

Bespoke Survey Research

July 2023

Pizza

Volume 16 | Quarterly Survey
1,250 US Consumers Balanced To Census
Tickers Covered: DPZ, YUM, PZZA.

KPIs and Key questions

DPZ TAKEAWAYS

1. Domino's customers overwhelmingly think it would be better to get Domino's through Domino's delivery over third party apps (92% selected Domino's delivery, 8% selected Uber Eats or Postmates).
2. One year ago, Domino's customers self-report having allocated a larger share of their Domino's engagements through delivery compared to what they are doing now (40% a year ago, 43% now).
3. Users of Postmates and Uber Eats indicate that they would be likely to order Domino's if they came across it while browsing on the former and the latter. Most of these folks would see these as additional orders, not replacement.
4. Consumers are pointing to higher prices at Domino's, but to a lesser extent than last quarter. Customers are actually increasingly going to Domino's because of the prices (less because of quality compared to historical readings).
5. Most Domino's customers use third party food delivery apps. That said, respondents increasingly note that their use of third-party food delivery apps does not impact how often they order from Domino's.
6. Among customers, self-reported Domino's visit recency / frequency is a bit softer compared to historical readings.

Noteworthy Stats:

29.4% Of respondents consume pizza a couple of times per month.

49.4% Of respondents who have eaten Domino's within the past year indicated that price is a top reason why they eat Domino's.

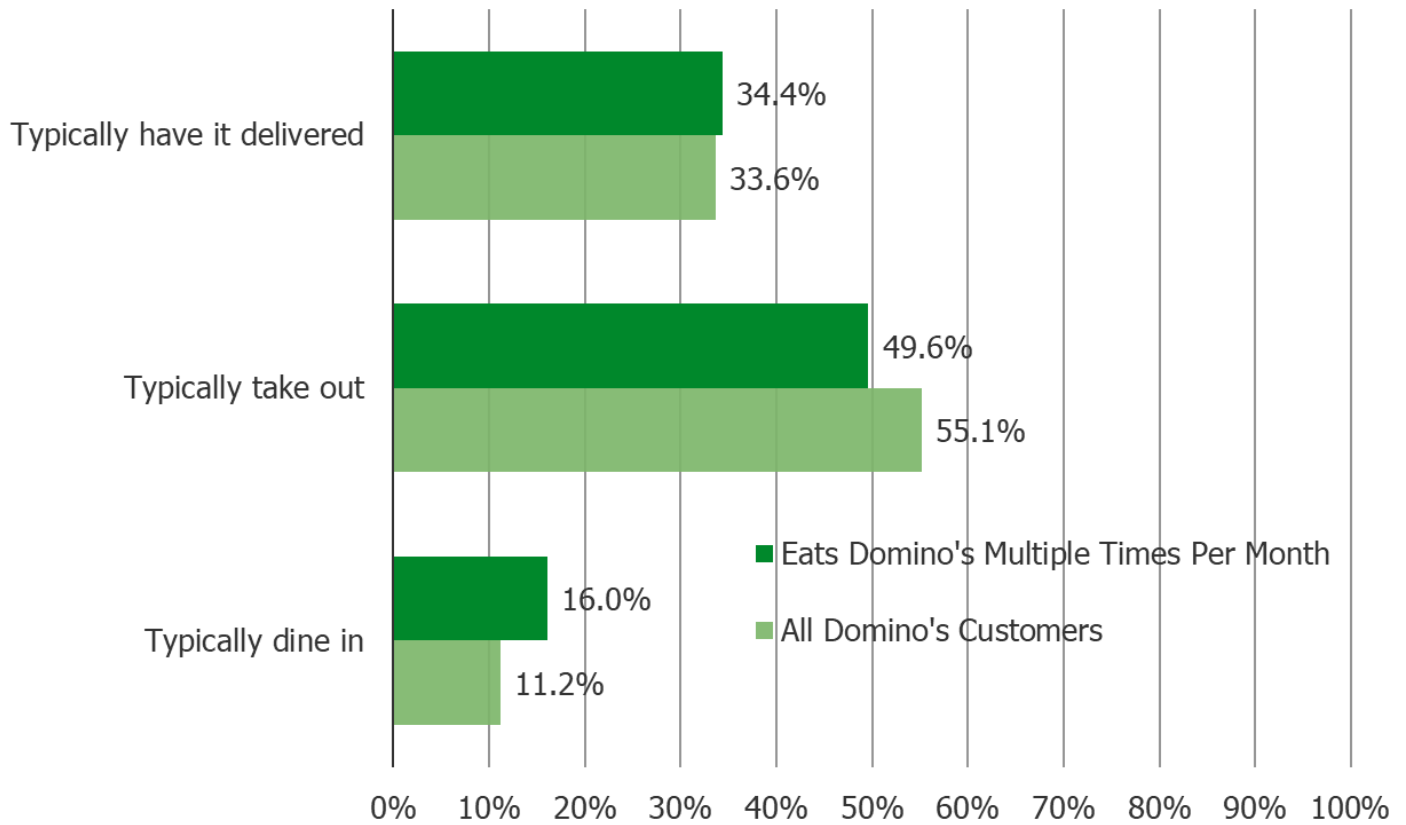
36.6% Of respondents who have eaten Domino's within the past year note that they order through the Domino's mobile app for pickup or delivery.

61.7% Of respondents who have eaten Domino's within the past year and use third party food delivery apps say that apps do not impact how often they order Domino's.

NEW QUESTIONS THIS QUARTER

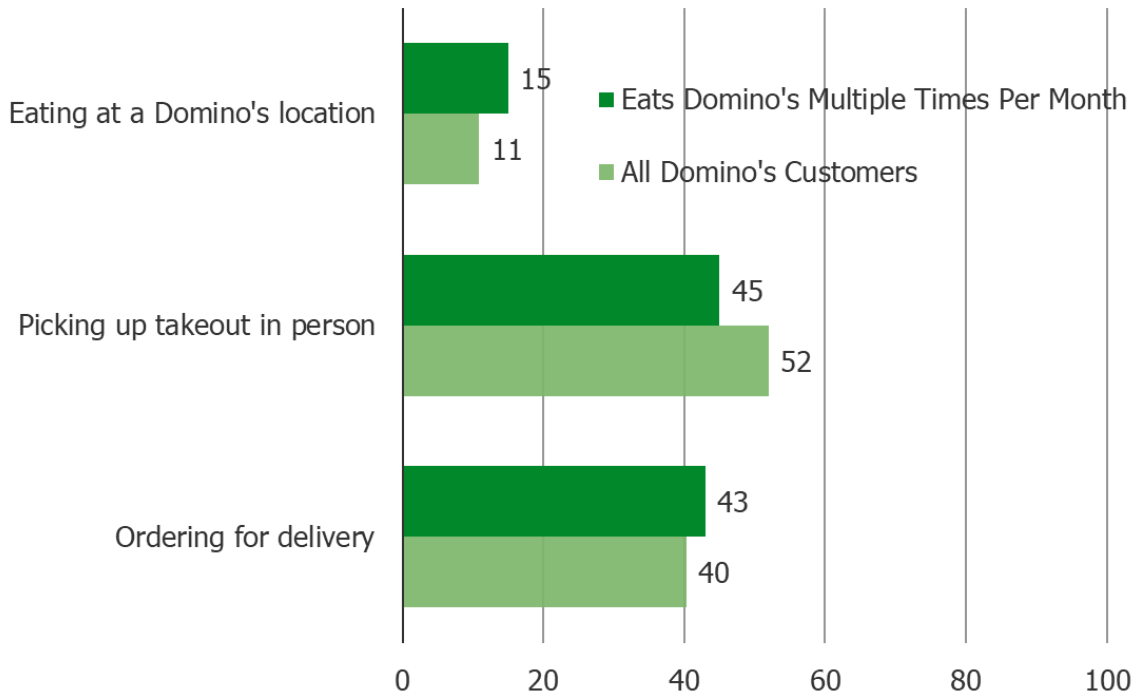
WHEN YOU GET DOMINO'S, DO YOU TYPICALLY DINE IN, TAKE OUT, OR HAVE IT DELIVERED?

Posed to respondents who eat Domino's regularly or occasionally.



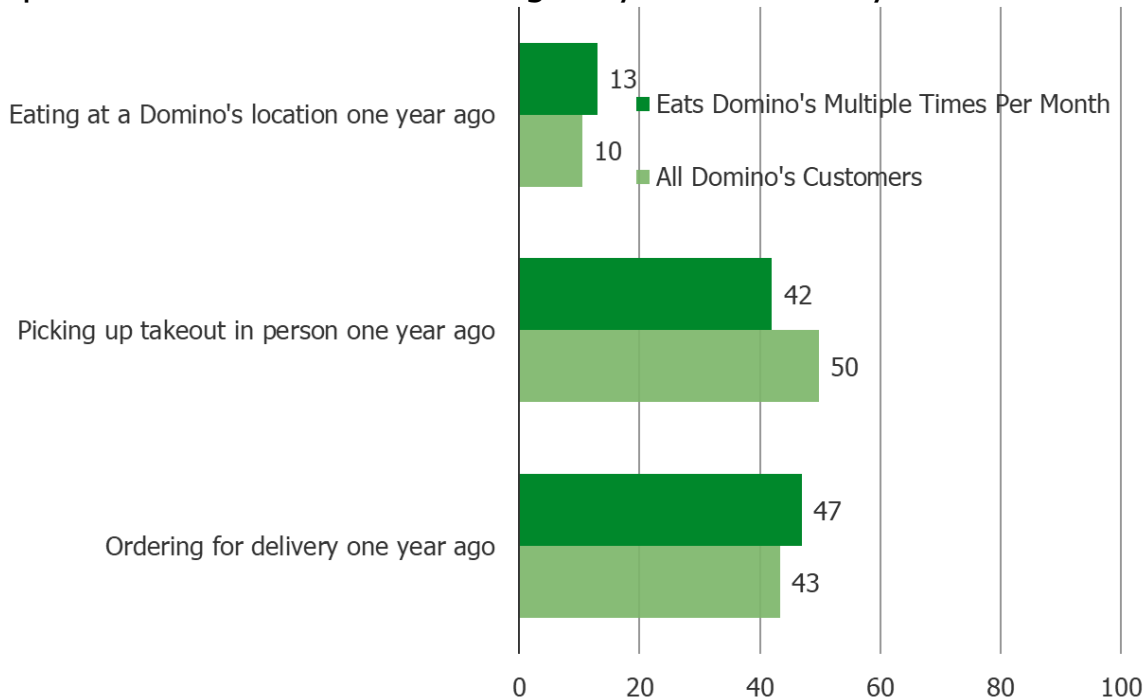
WHAT PERCENTAGE OF THE TIMES YOU HAVE DOMINO'S DO YOU GET IT IN THE FOLLOWING WAYS?

Posed to respondents who eat Domino's regularly or occasionally.



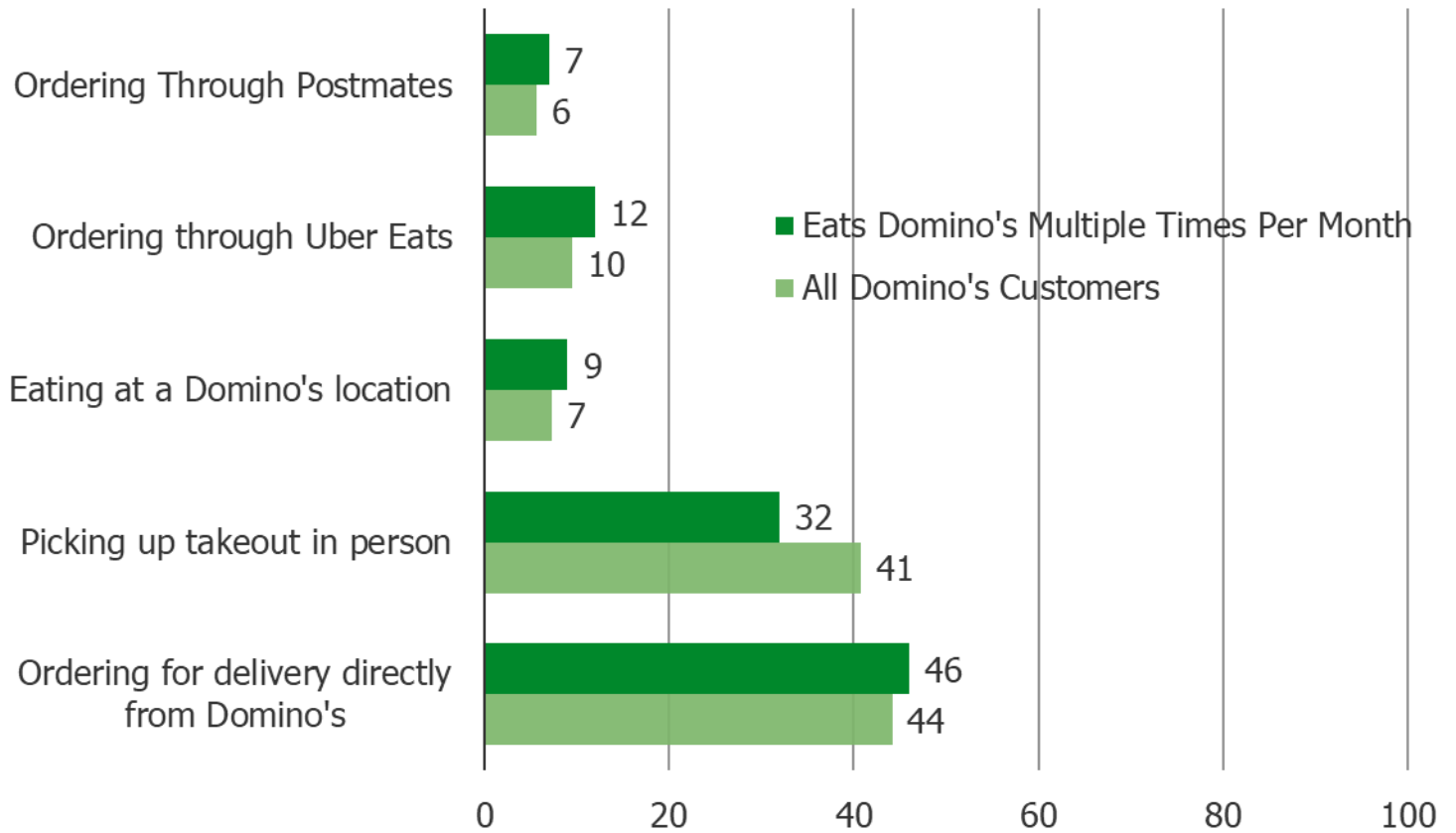
IF WE ASKED YOU THIS QUESTION ONE YEAR AGO, WHAT WOULD YOU HAVE SAID? WHAT PERCENTAGE OF THE TIMES YOU HAVE DOMINO'S DO YOU GET IT IN THE FOLLOWING WAYS?

Posed to respondents who eat Domino's regularly or occasionally.



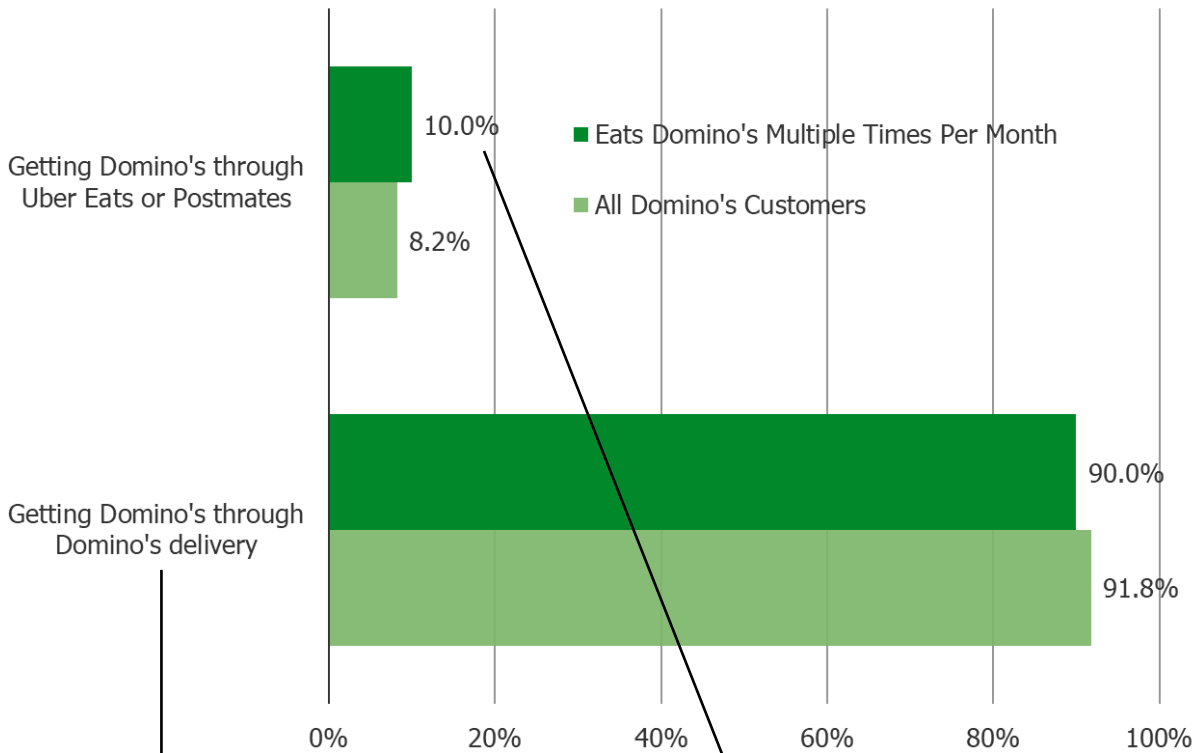
IF DOMINO'S WAS AVAILABLE ON UBER EATS OR POSTMATES, WHAT PERCENTAGE OF YOUR DOMINO'S ORDERS WOULD BE MADE THE FOLLOWING WAYS...

Posed to respondents who eat Domino's regularly or occasionally.



IN YOUR OPINION, WHICH WOULD BE BETTER?

Posed to respondents who eat Domino's regularly or occasionally.

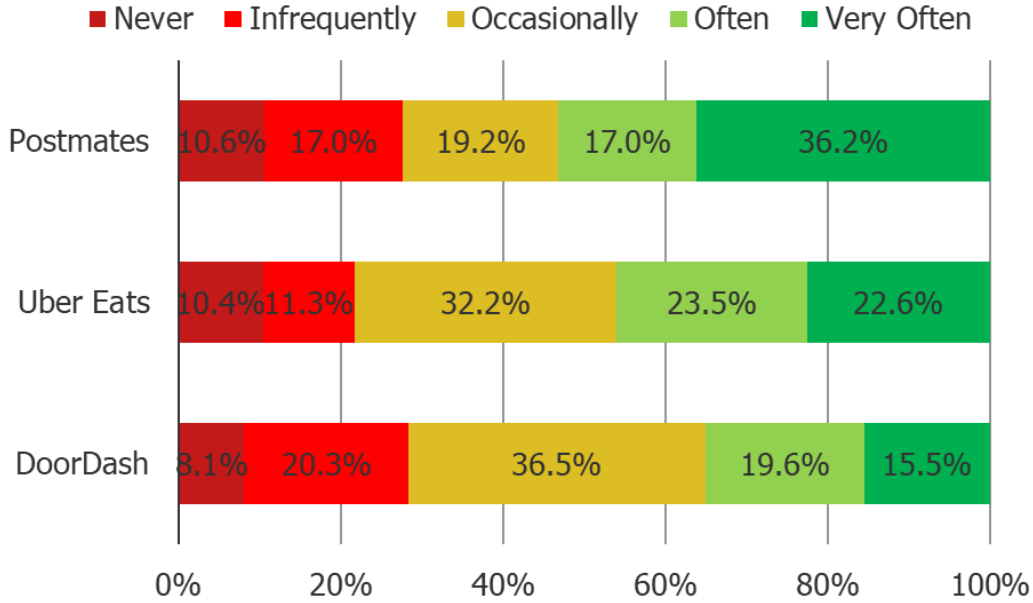


use uber fees less time cost less
directly cheaper Domino's
food better delivery
delivery services

Only a handful of folks selected this option. Ones who did flagged that Domino's won't deliver to them, ease/convenience, or Domino's charging too much.

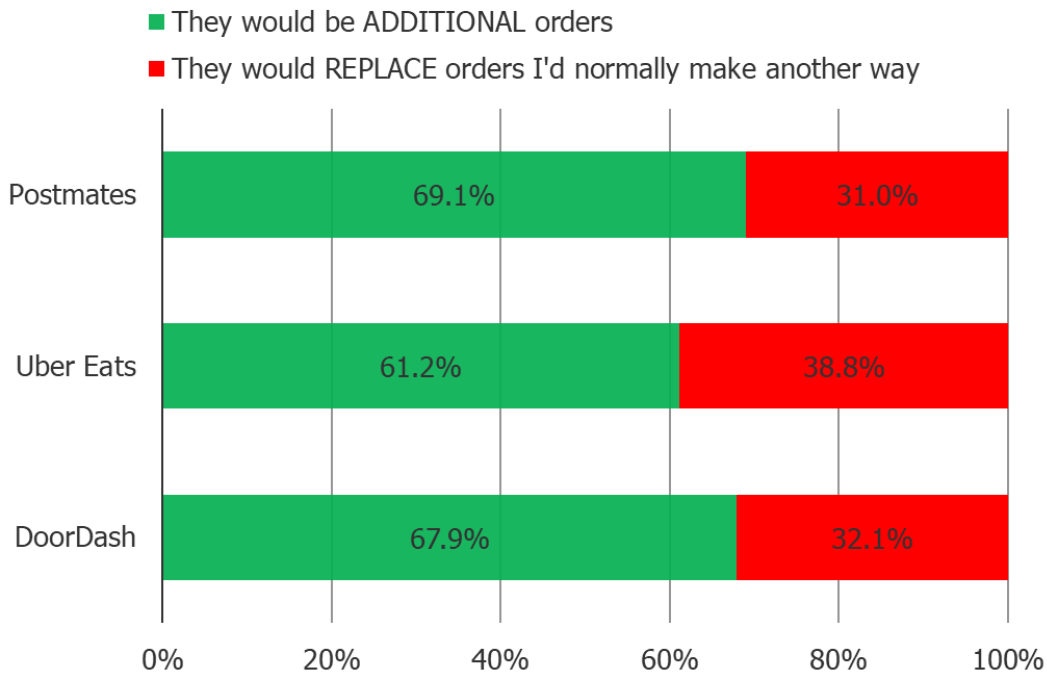
IF YOU CAME ACROSS DOMINO'S ON THE FOLLOWING APP(S), HOW OFTEN DO YOU THINK YOU WOULD ORDER FROM THERE THROUGH THIS APP?

Posed to respondents who use each of the following platforms...



IF YOU CAME ACROSS DOMINO'S ON THE FOLLOWING APP(S), HOW OFTEN DO YOU THINK YOU WOULD ORDER FROM THERE THROUGH THIS APP?

Posed to respondents who use each of the following platforms and said they would order from Domino's through each app at least infrequently...



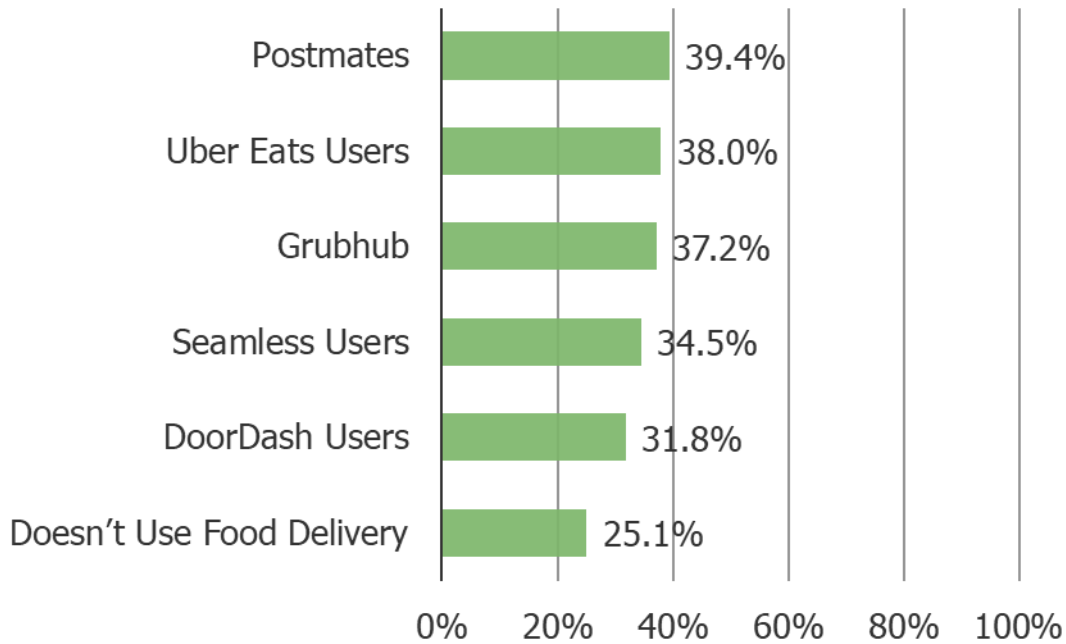
ORDERS FOOD DELIVERY APPS REGULARLY OR OCCASIONALLY...

Cross-tabs, Domino's customers by how often they eat Domino's

	Orders Regularly or Occasionally					
	Uber Eats	Door Dash	Seamless	Grubhub	Postmates	None
Eats Domino's: Every day or nearly every day	63.2%	52.6%	18.4%	42.1%	34.2%	2.6%
Eats Domino's: Multiple times per week	65.7%	77.1%	22.9%	42.9%	30.0%	4.3%
Eats Domino's: Around once per week	40.4%	58.6%	18.2%	33.3%	26.3%	12.1%
Eats Domino's: 2-3 times per month	44.2%	55.1%	4.1%	27.2%	10.9%	17.0%
Eats Domino's: Around once per month	38.0%	57.7%	5.1%	20.4%	6.6%	24.8%
Eats Domino's: Less than once per month	24.1%	47.7%	0.8%	16.9%	2.5%	33.8%

USERS OF EACH OF THE FOLLOWING APPS, % WHO EAT DOMINO'S REGULARLY OR OCCASIONALLY

Posed to users of each of the following platforms.



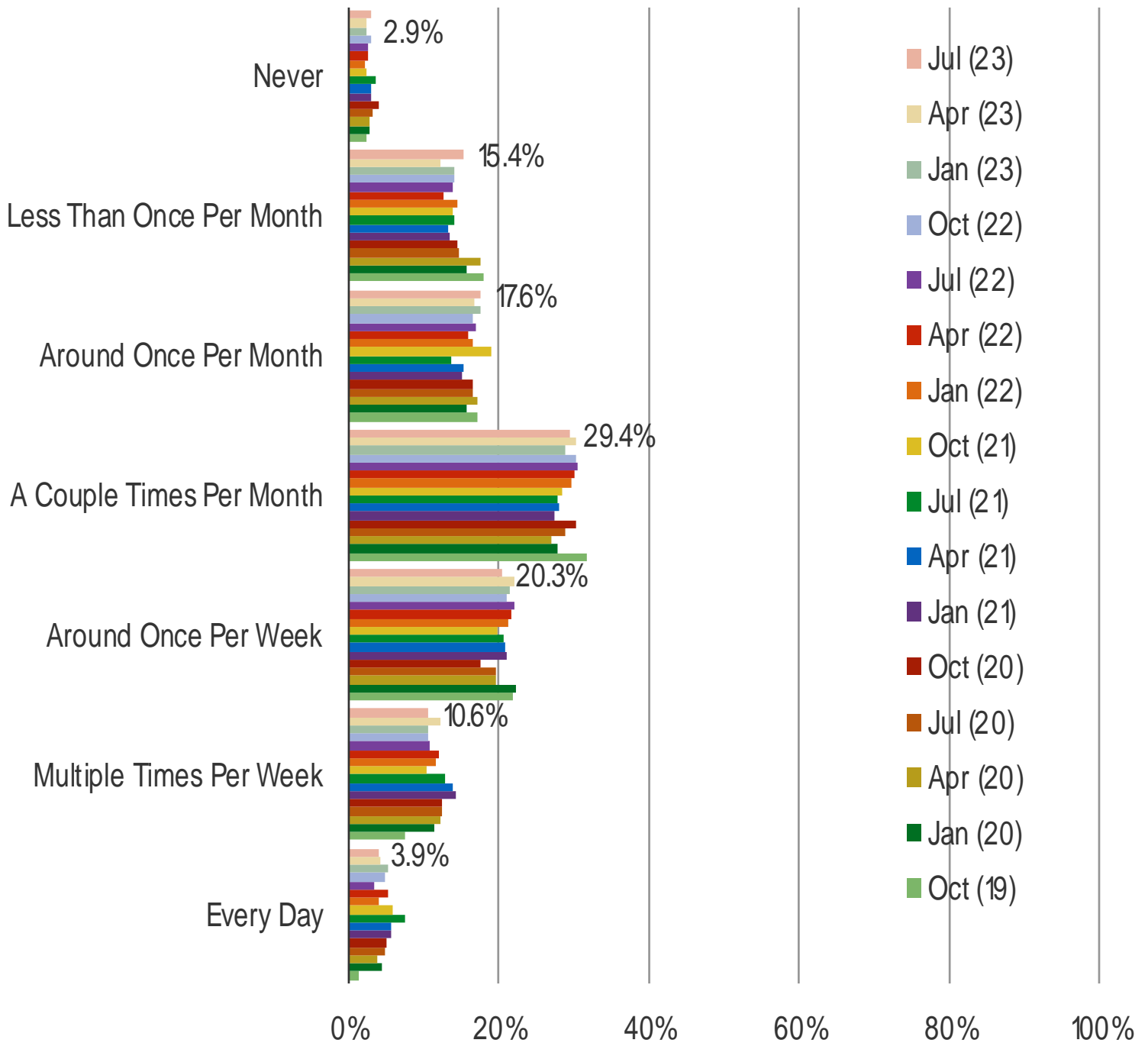
DPZ and Food Delivery Apps

PIZZA

PIZZA

HOW OFTEN DO YOU EAT PIZZA?

Posed to all respondents.

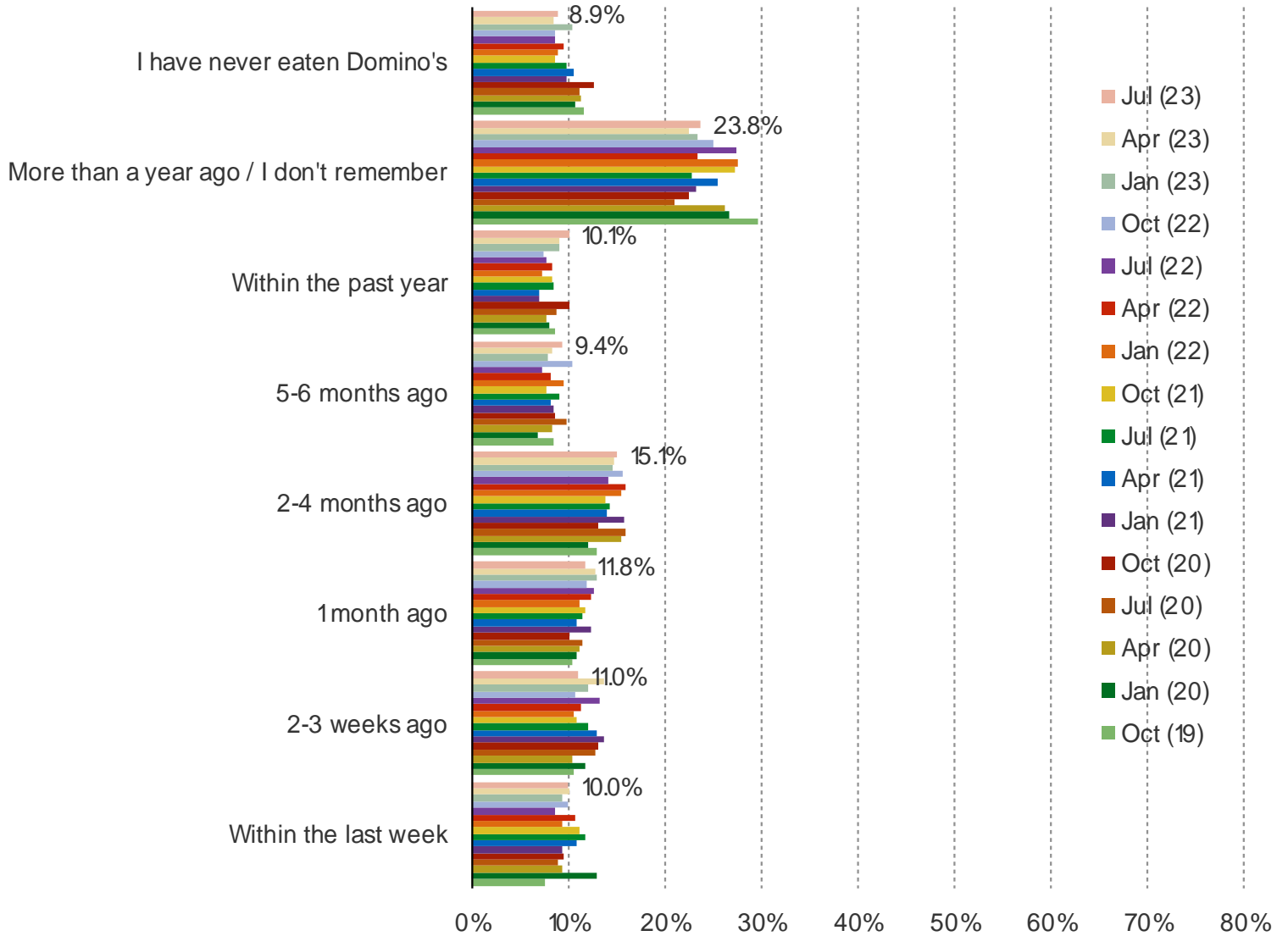


DPZ ENGAGEMENT

PIZZA

WHEN WAS THE LAST TIME YOU ATE DOMINO'S?

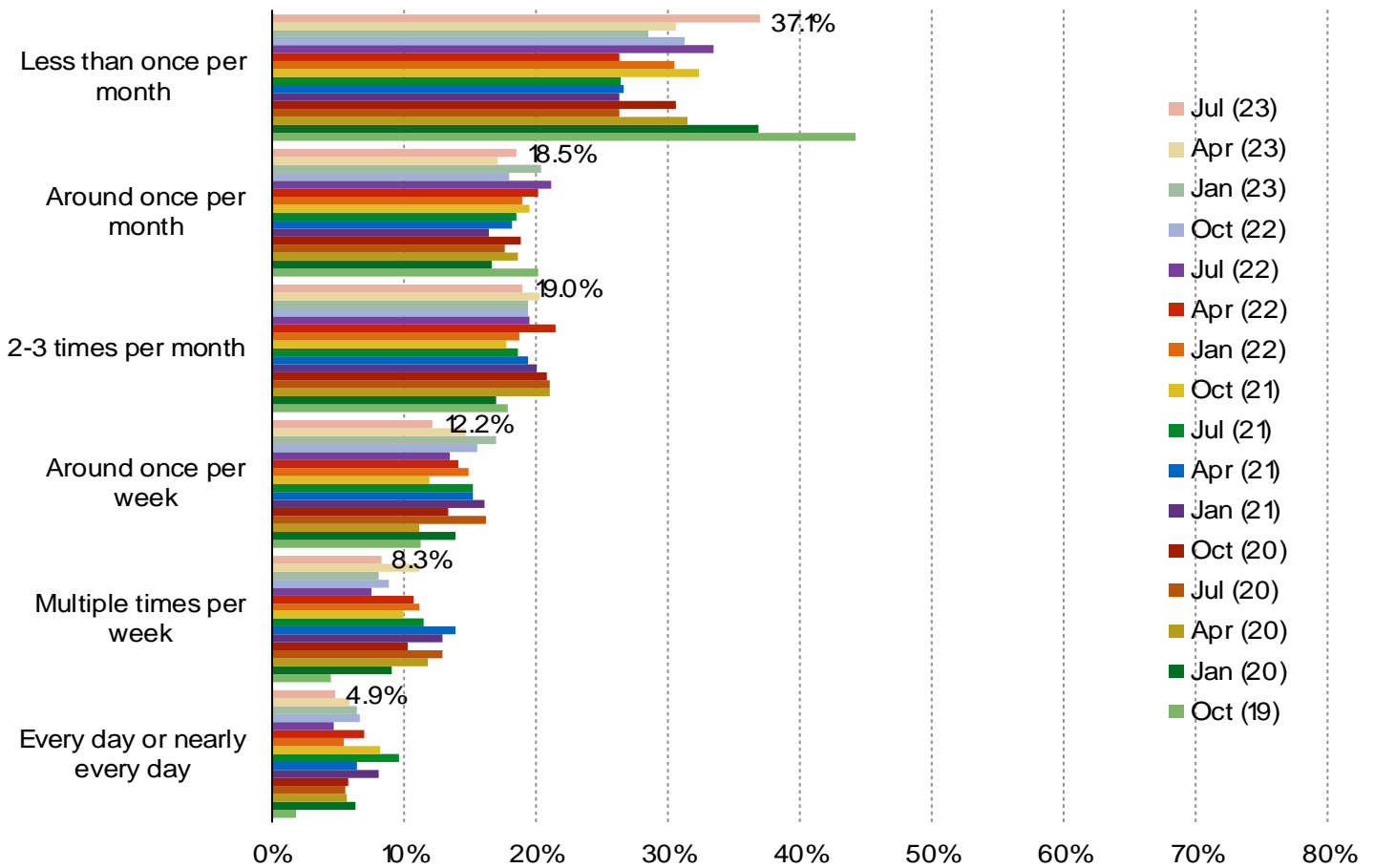
Posed to all respondents.



PIZZA

HOW FREQUENTLY DO YOU TYPICALLY EAT DOMINO'S?

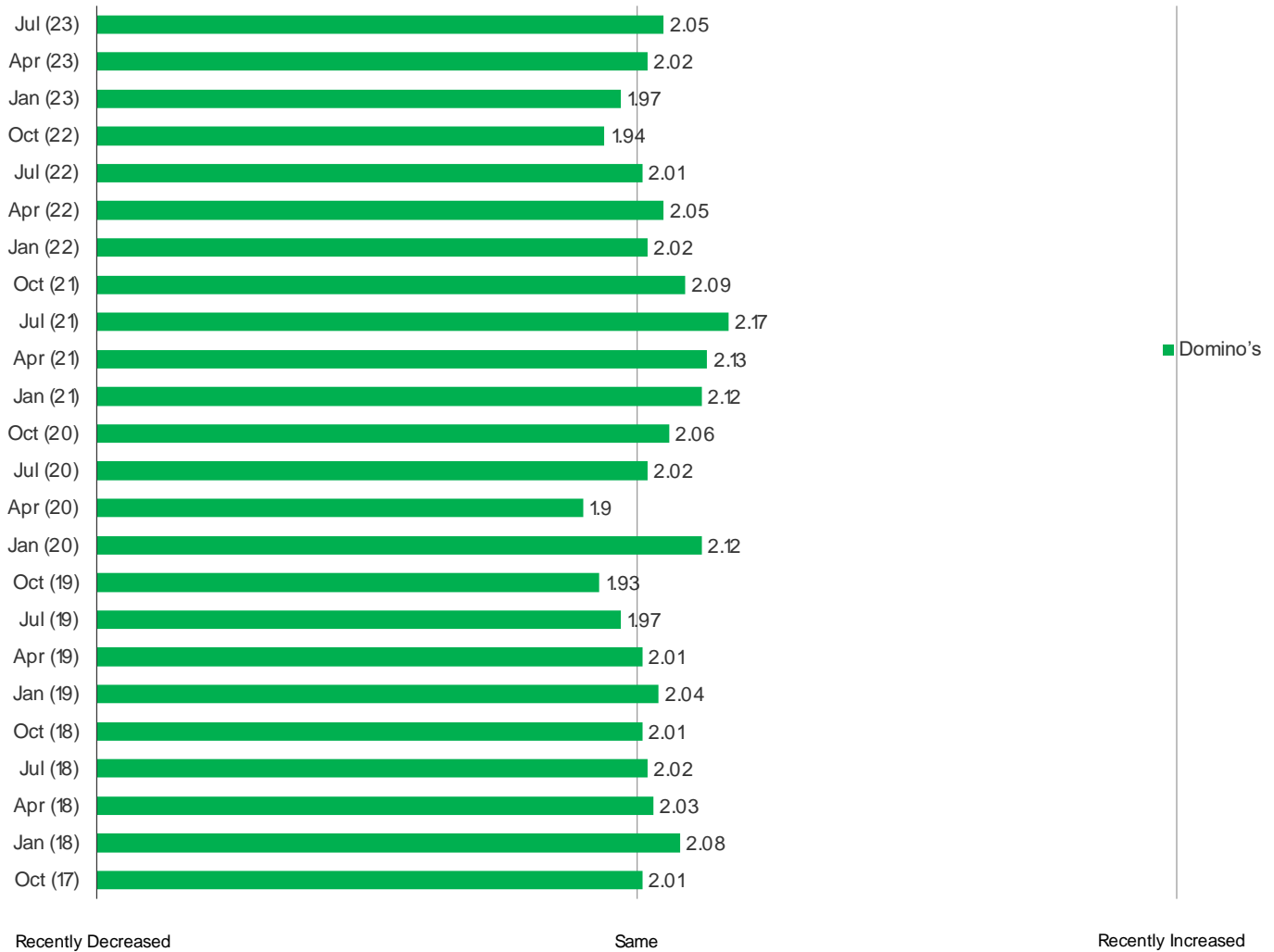
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU CHANGED HOW OFTEN YOU TAKEOUT OR DINE AT DOMINO'S?

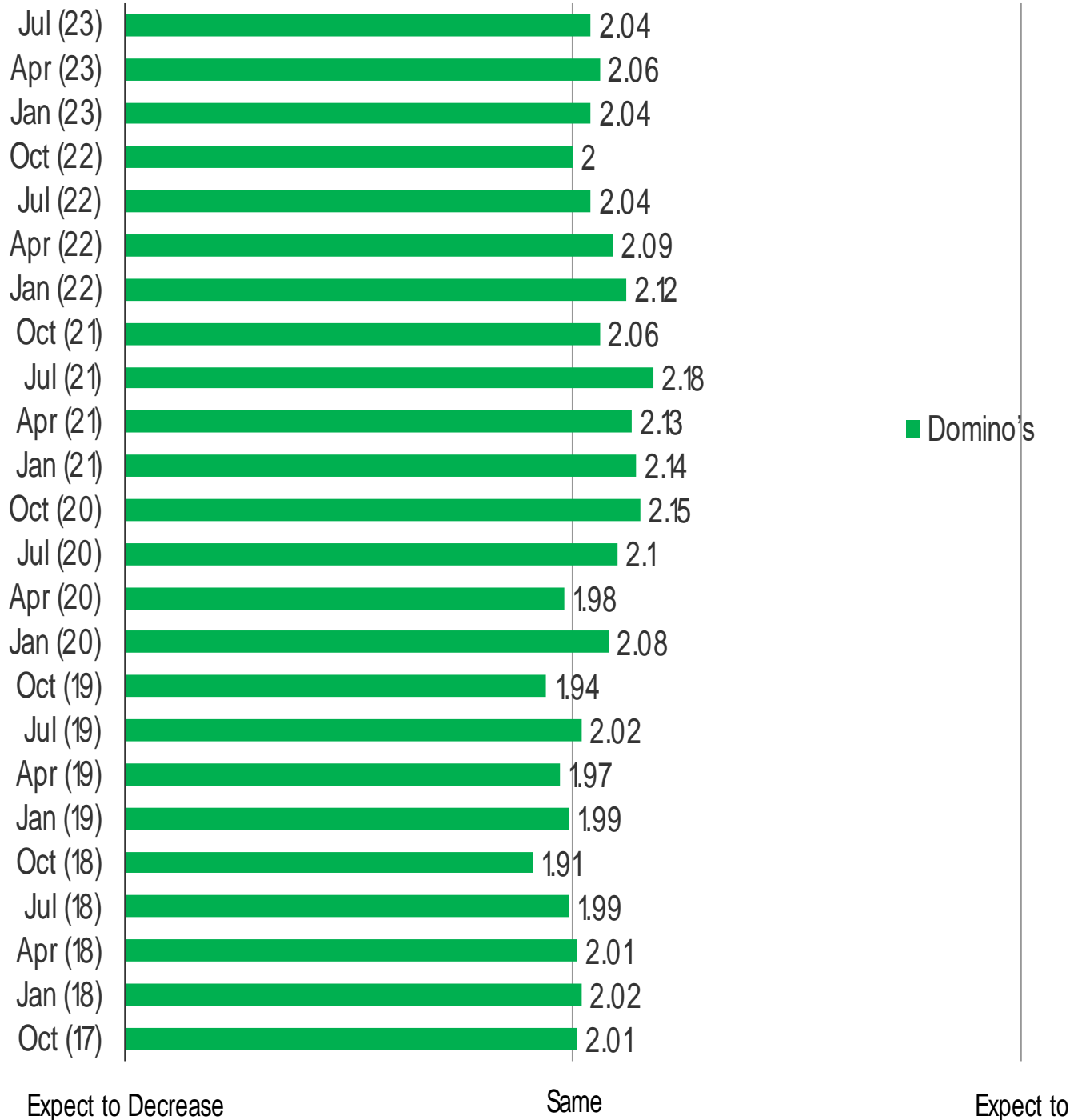
Posed to respondents who have eaten Domino's in the past year.



PIZZA

GOING FORWARD, DO YOU EXPECT TO CHANGE HOW OFTEN YOU TAKEOUT OR DINE AT DOMINO'S?

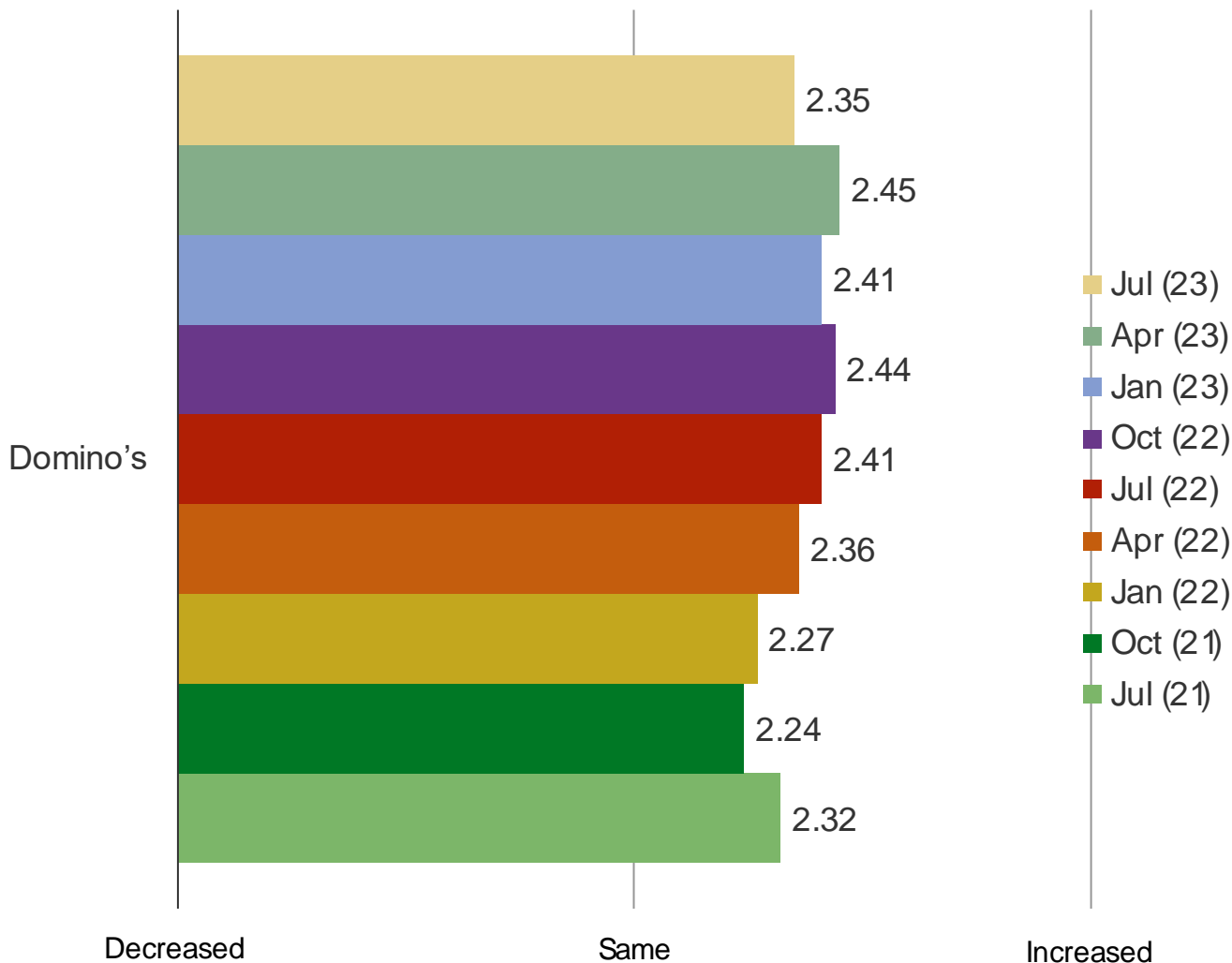
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU NOTICED ANY CHANGES TO MENU PRICES AT THE FOLLOWING RECENTLY?

Posed to respondents who regularly or occasionally eat each of the following.

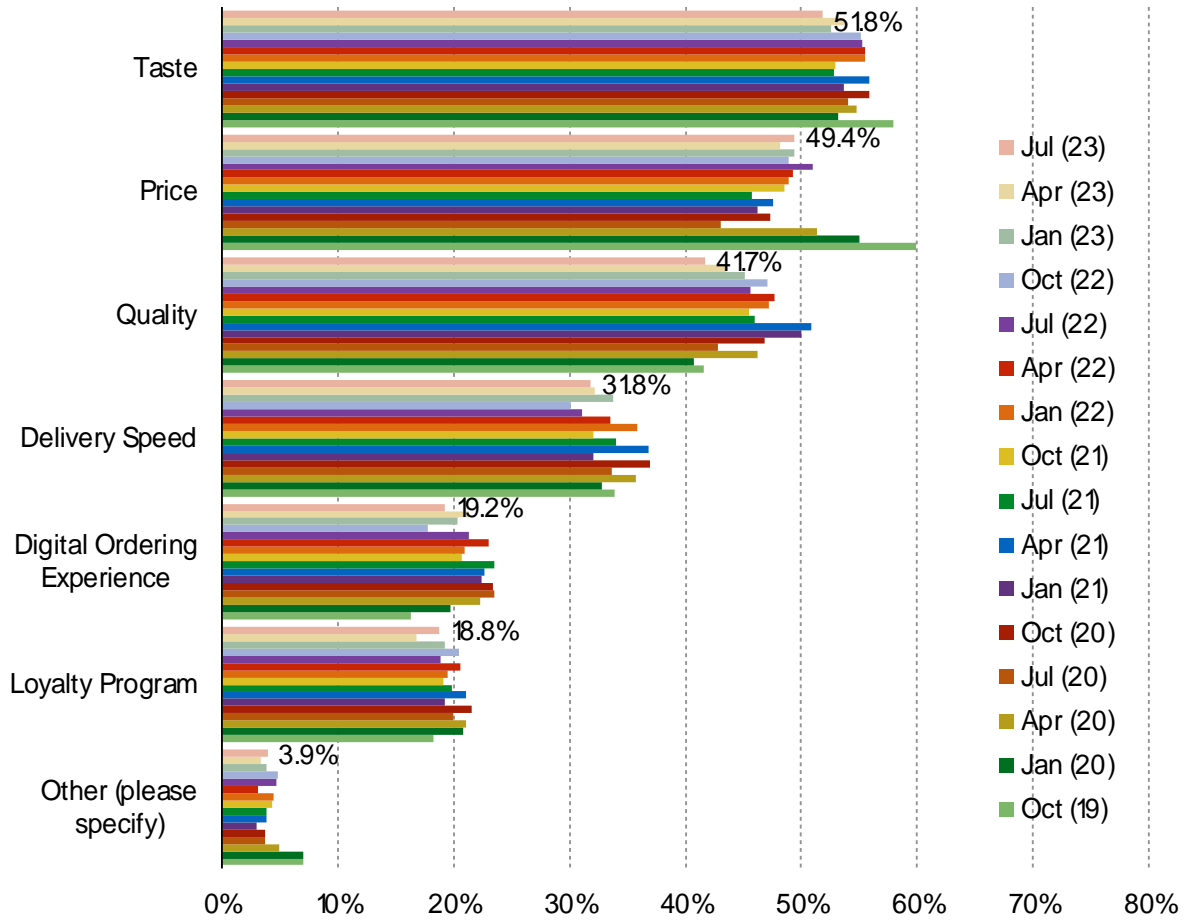


CATALYSTS AND MOBILE ORDERING

PIZZA

WHY DO YOU EAT DOMINO'S (SELECT ALL THAT APPLY)

Posed to respondents who have eaten Domino's in the past year.

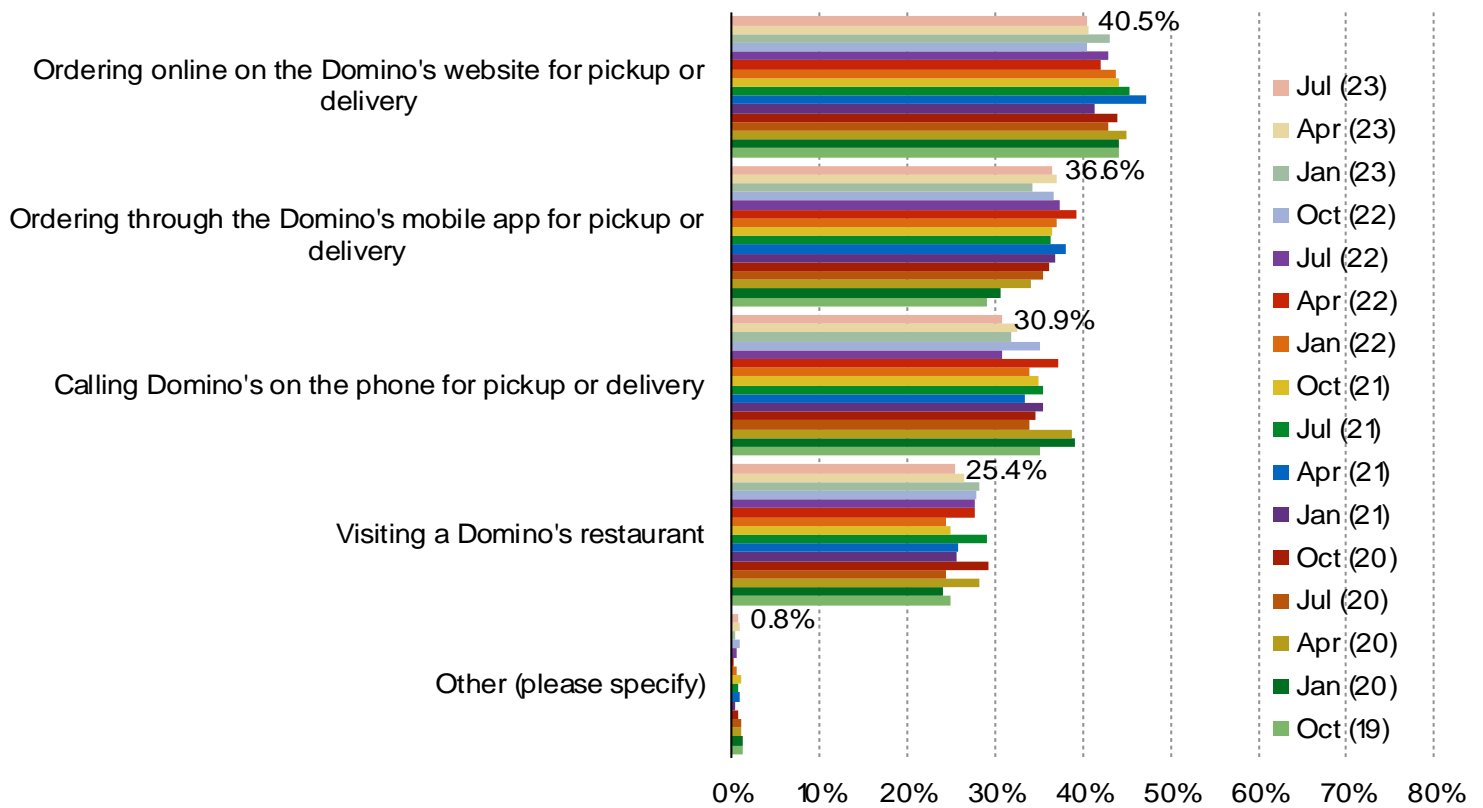


*Of those who filled in "other" most cited reasons related to convenience.

PIZZA

HOW DO YOU TYPICALLY GET DOMINO'S?

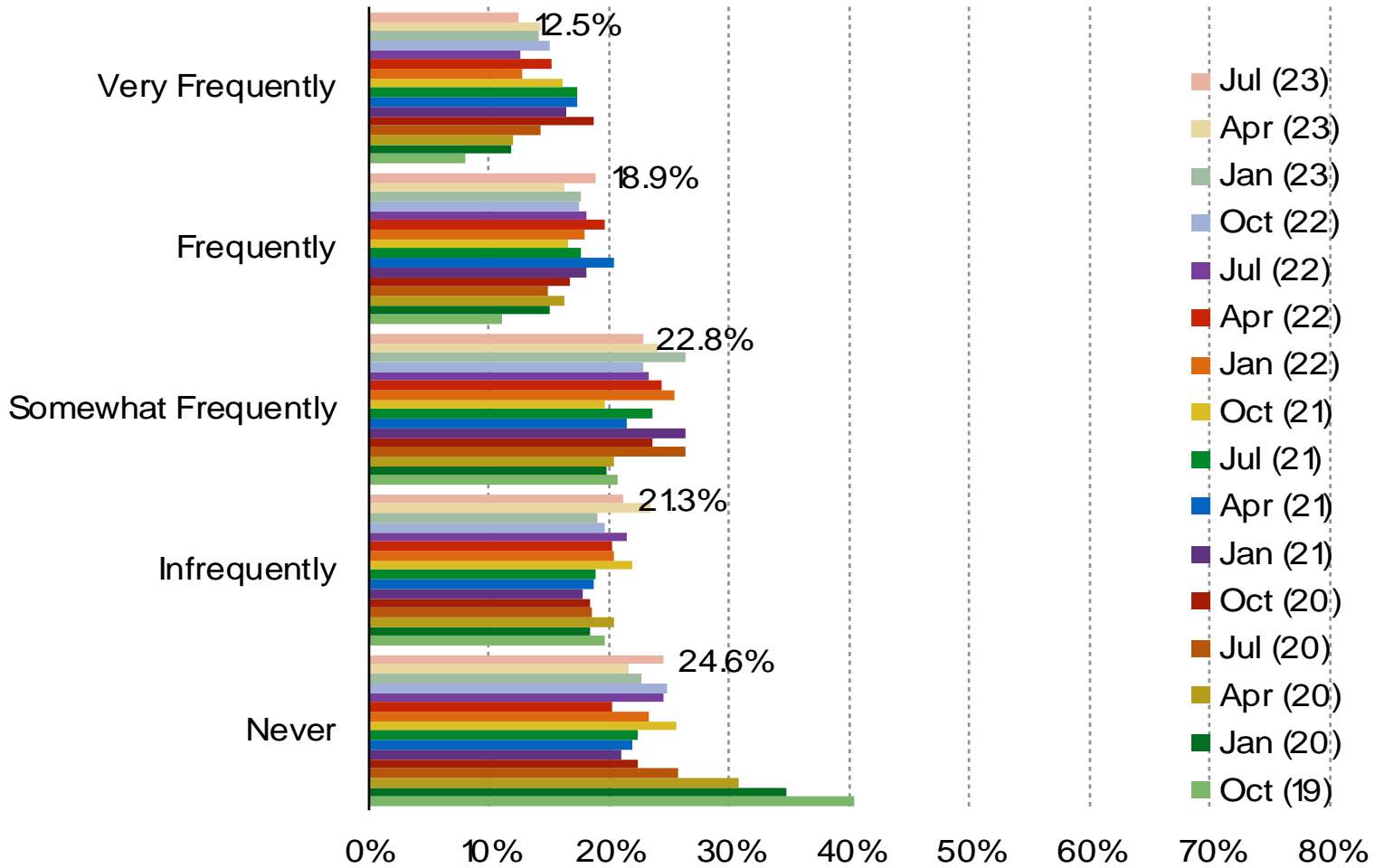
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HOW OFTEN DO YOU ORDER THROUGH DOMINO'S MOBILE APP?

Posed to respondents who have eaten Domino's in the past year.

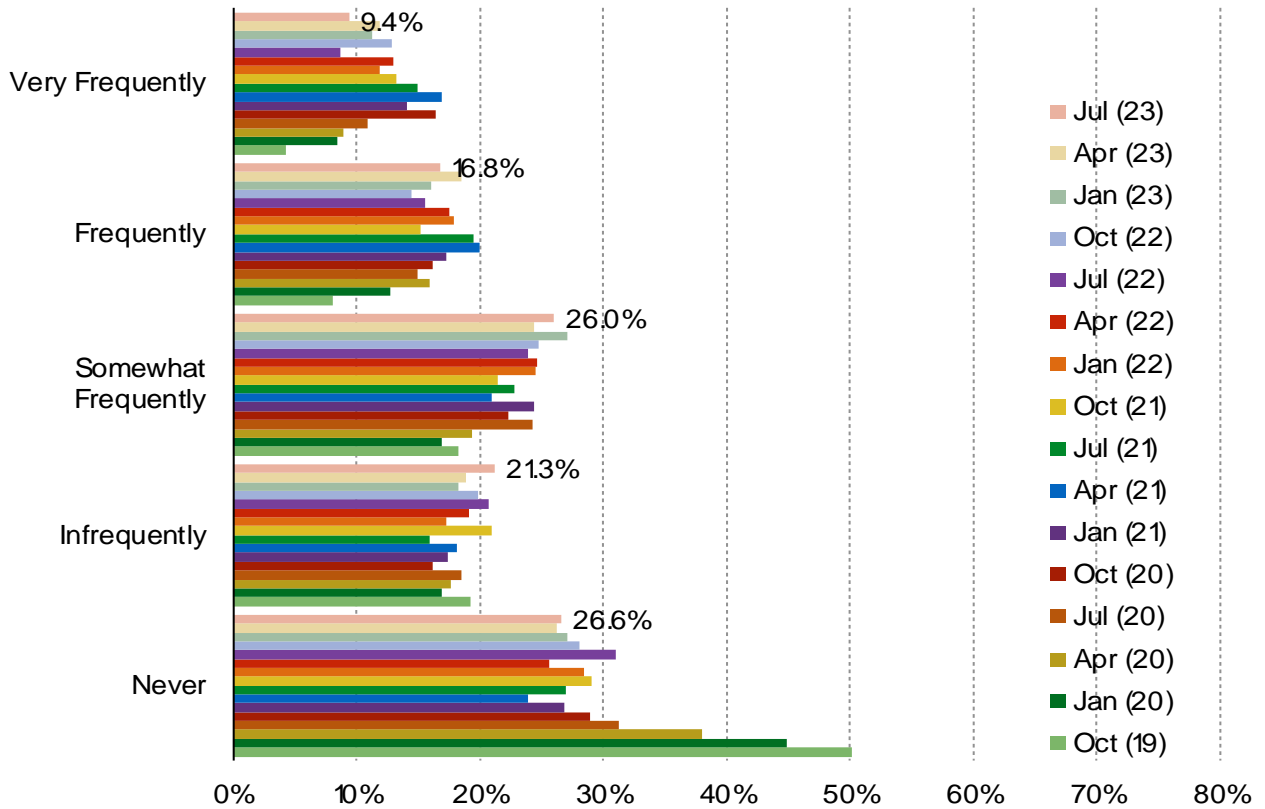


THIRD PARTY FOOD DELIVERY APPS VS. DPZ

PIZZA

HOW OFTEN DO YOU ORDER (FROM ANY RESTAURANT) THROUGH THIRD PARTY FOOD DELIVERY APPS? (IE. UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC)

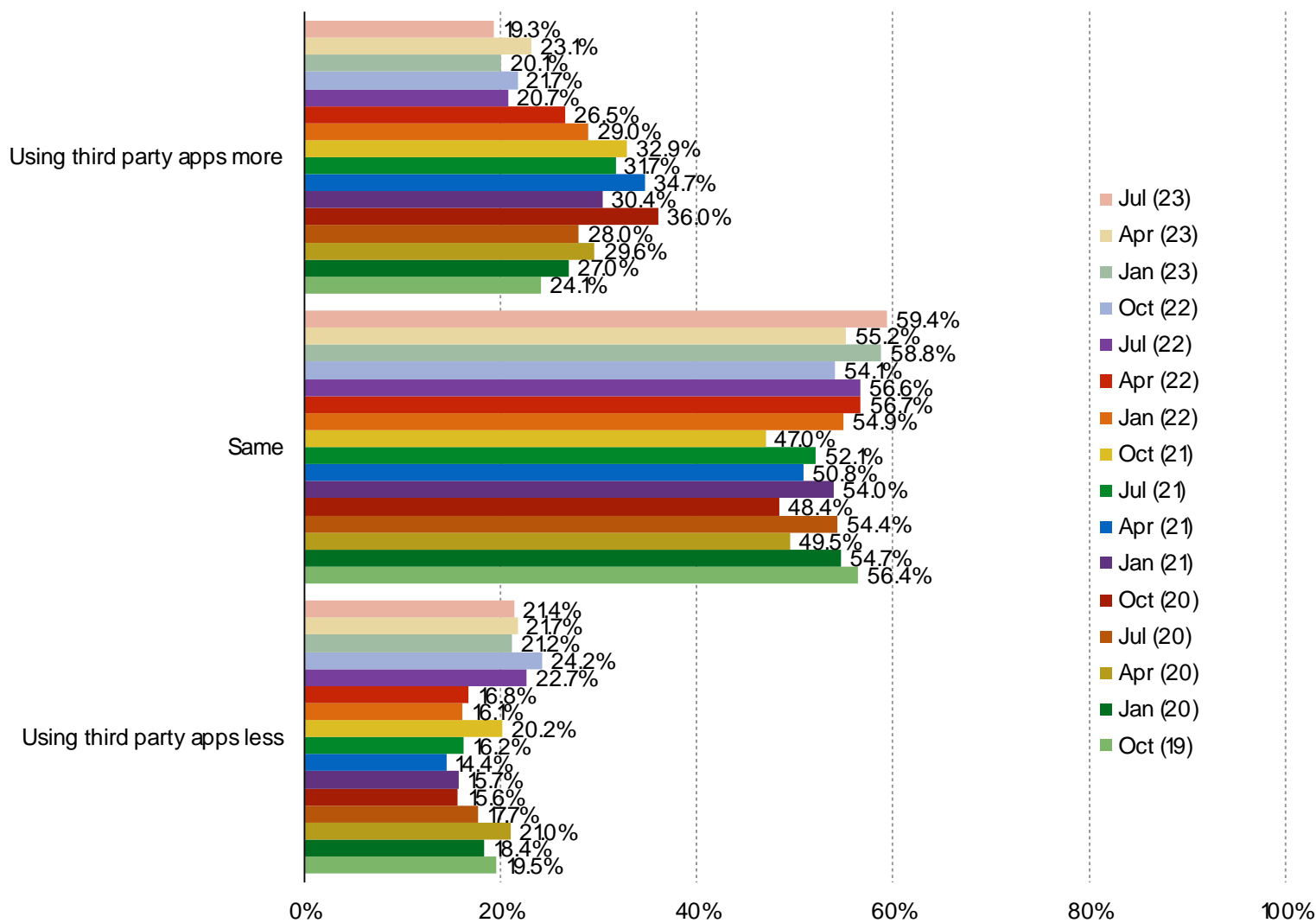
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU BEEN USING THIRD PARTY FOOD DELIVERY APPS (UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC) MORE OR LESS OVER TIME?

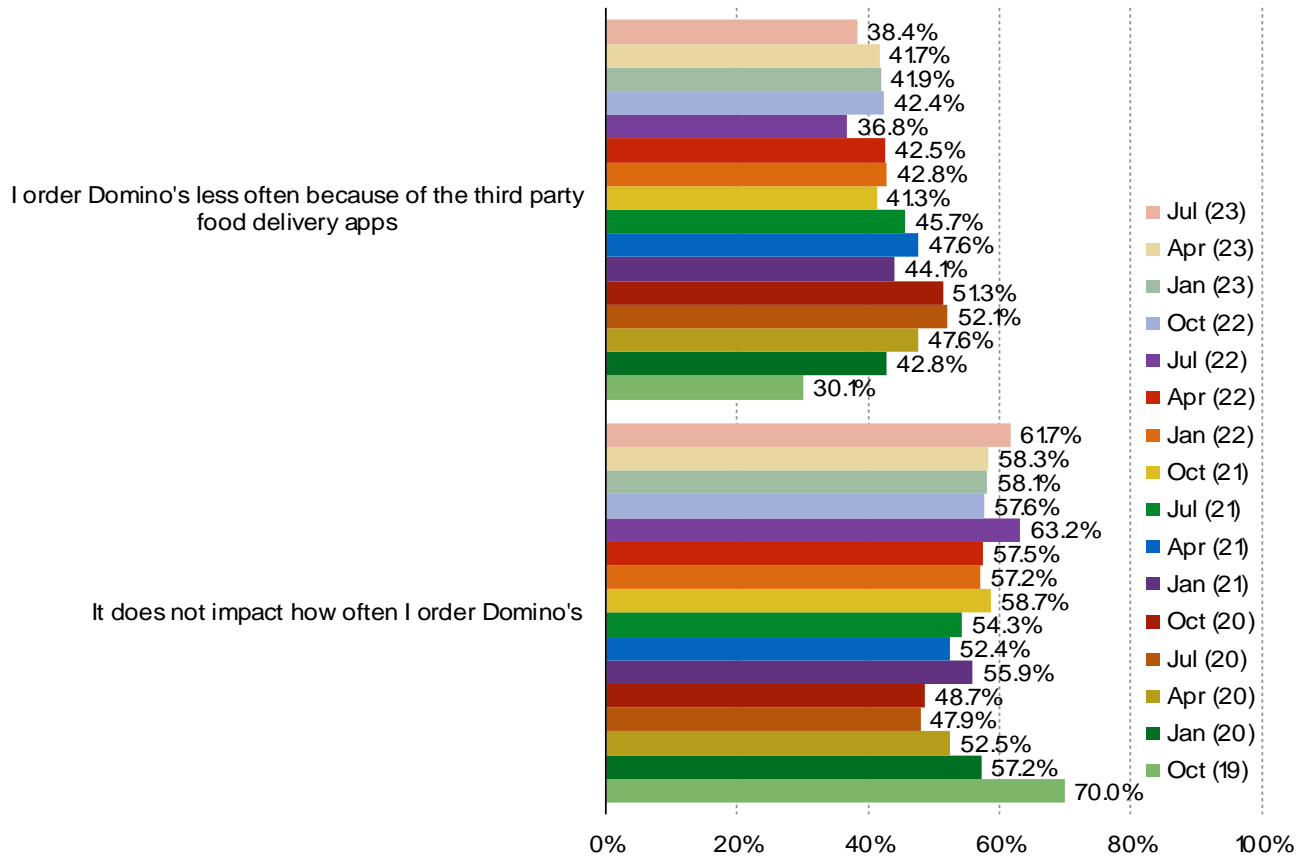
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

DOES YOUR USAGE OR THIRD PARTY FOOD DELIVERY APPS (UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC) HAVE ANY IMPACT ON HOW OFTEN YOU ORDER DOMINO'S?

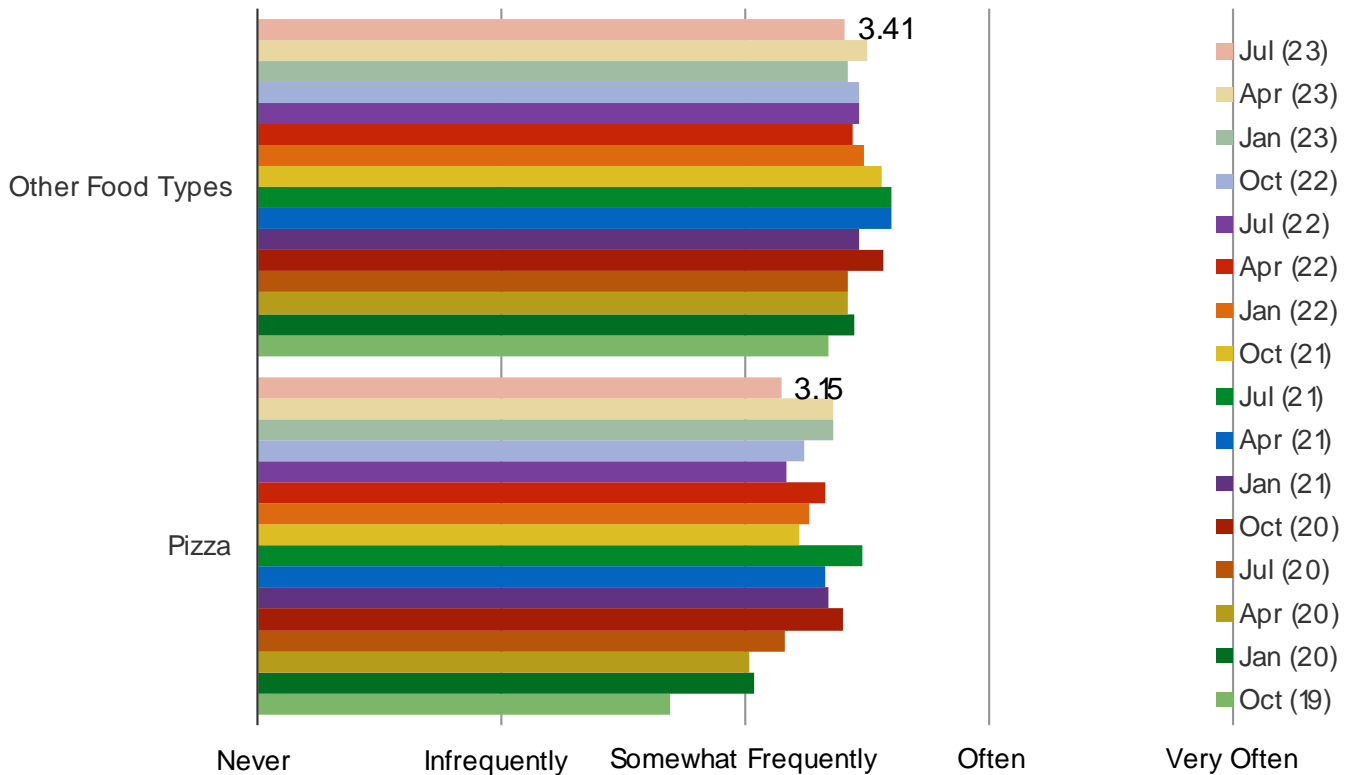
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

WHEN YOU ORDER THROUGH THIRD PARTY FOOD DELIVERY APPS, ARE YOU ORDERING PIZZA OR OTHER FOOD TYPES?

Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

WOULD YOU ESTIMATE THAT YOU HAVE BEEN INCREASING OR REDUCING YOUR CONSUMPTION OF DOMINO'S OVER THE PAST YEAR OR SO?

Posed to respondents who have eaten Domino's in the past year.

