Food Delivery

Volume 28| Quarterly Survey
1,500 US Consumers Balanced To Census
Tickers Covered: UBER, DASH, GRUB.

KPIs and Key questions

1. Respondents are more likely to view food delivery apps as a luxury than they are to view grocery delivery as a luxury. The share who view food delivery apps as a luxury increased q/q.

2. Food delivery app users are more likely to self-report decreases in usage than increases in usage. That trend has been consistent in each of the past four quarterly survey volumes.

3. The share of consumers who use food delivery apps increased considerably during Covid and has held generally flat since (2021).

4. During the pandemic, usage frequency among adopters increased. During the last year or two, consumers have shifted their pattern to more occasional usage and less high frequency usage.

5. DoorDash's growth in adoption over the history of our survey has been very strong (among the stronger growth trends we've seen across all of our surveys.

6. An increasing percentage of Uber Eats users are also using DoorDash. Conversely, the share of DoorDash users who are also using Uber Eats has been flatter over time.

7. Food Delivery users are increasingly telling us low fees is the most important feature in deciding which food delivery app to use.

8. Users of most food delivery platforms show worsening sentiment toward each app's fees.

9. Food delivery app users also have been allocating a lower % of their total orders to each of the apps on their phone (relative to when we first started asking this question).
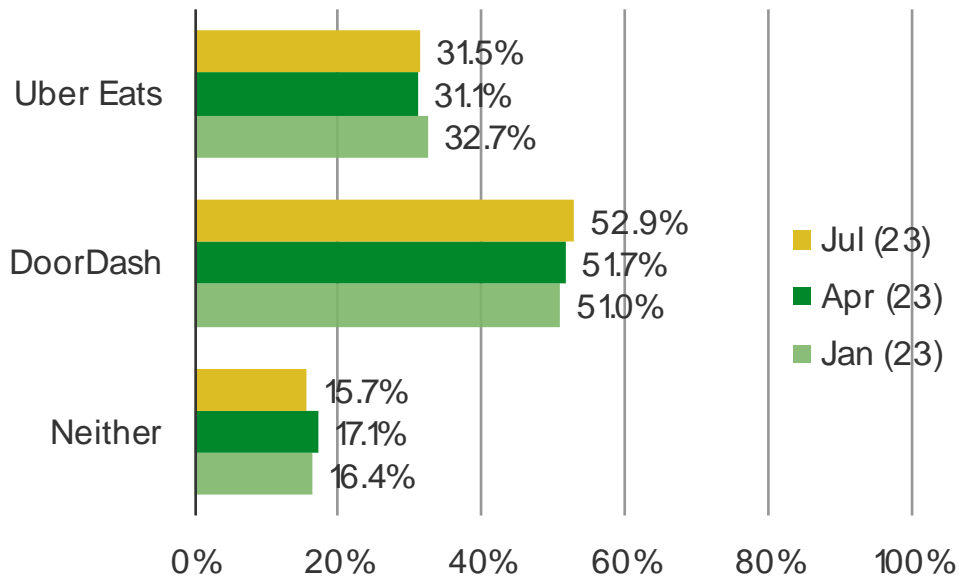
Noteworthy Stats:

25.8% Of respondents order food through websites online or through apps either frequently or very frequently.

34.4% Of respondents who use food delivery apps use Uber Eats regularly or occasionally.

52.6% Of respondents view food delivery apps as a luxury (share has increased over time).
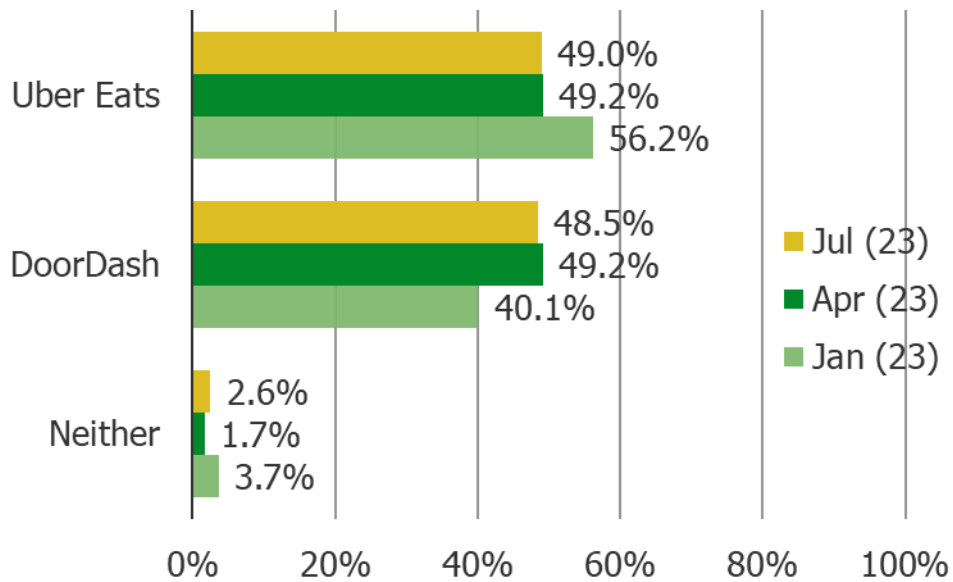
RECENTLY ADDED QUESTIONS

IF YOU HAD TO CHOOSE ONLY ONE OF THESE TO USE, WHICH WOULD YOU PICK?

Posed to all food delivery users.

Category	Jul (23)	Apr (23)	Jan (23)
Uber Eats	31.5%	31.1%	32.7%
DoorDash	52.9%	51.7%	51.0%
Neither	15.7%	17.1%	16.4%

Posed to respondents who said they use BOTH DoorDash AND Uber Eats.

Category	Jul (23)	Apr (23)	Jan (23)
Uber Eats	49.0%	49.2%	56.2%
DoorDash	48.5%	49.2%	40.1%
Neither	2.6%	1.7%	3.7%

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH who prefer DoorDash

Because I am most familiar with it
Because I like their door dash plus better
Because i love their way of attending to the costumer's
because i love to use doordash
Because I've used the most before
Because is so amazing and fantastic
Because it is better
Because it's a good app
Because it's cheaper
Because it's great and i trust in it
Because it's inexpensive, and fast delivery
Because of it inexpensive and personality test and innovative ideas
Because the fees aren't as high.
Because they are fast and excellent in handling
Because they are quick on their feet
Because they are very much reliable and trustworthy and premium
best drivers
best selection
Better fees
Better prices and service
Cheaper
Cheaper rates
Cheapest and good tracking
Discount through Amazon Prime and more user friendly
DoorDash has a better selection of restaurants I can order food from in my area.
DoorDash is cheaper than Uber Eats.
Easy-to-use
Fast cheap easy
faster delivery
Has a great deal and it is easy to use
I get free delivery fees
I have good previous experience
I have had better device with doordash
I have had better luck with hot food delivered in a timely manner
I just like to stack to what I know.,
I like the service
I like the service
I like it
I like their selections
I prefer the restaurants available on this platform
I sometimes drive for them so get added promotions
I use them very often and their fees are low.

I'm more formalized with it
I'm most familiar with it and it has the restaurants I enjoy.
I'm the most familiar with it.
I've been using the site longer and has good results.
I'm just used to it
It is faster
It is very delicious
It seems to be the most popular of the three
It's attractive
It's cheaper
It's local we're I live
It's quick and easy and safe
Just feel they offer more restaurants and more affordable fees
Less fees more options
Like
love
More familiar to me
More restaurants
Overall better
Person might have to make a stop or cancel order
Probably cheaper - ubereats has added so many fees.
Quality
Quality
Reliability
Reliable
Seems more popular/more reliable
Since all driver use all apps, ot does appear better
The best ever to use
The fees are lower most of the time
There application user interface is fantastic and very easy to use. There are a wide variety of options. There is a very good filtering system.
They are one of the best
They are the most reliable
They have better drivers in my area.
They have cheaper fees
They have more restaurants available compared to others
they have tasty food
They have the best rates and resturaunt selection.
They have the fastest delivery time
They have the restaurants that I enjoy
They quick
They seem more popular than the others.
They seem to have the most friendliest and professional drivers
Uber behaved badly, in authoritarian ways, during COVID.
Use the most so very familiar and low to no deliveryfee
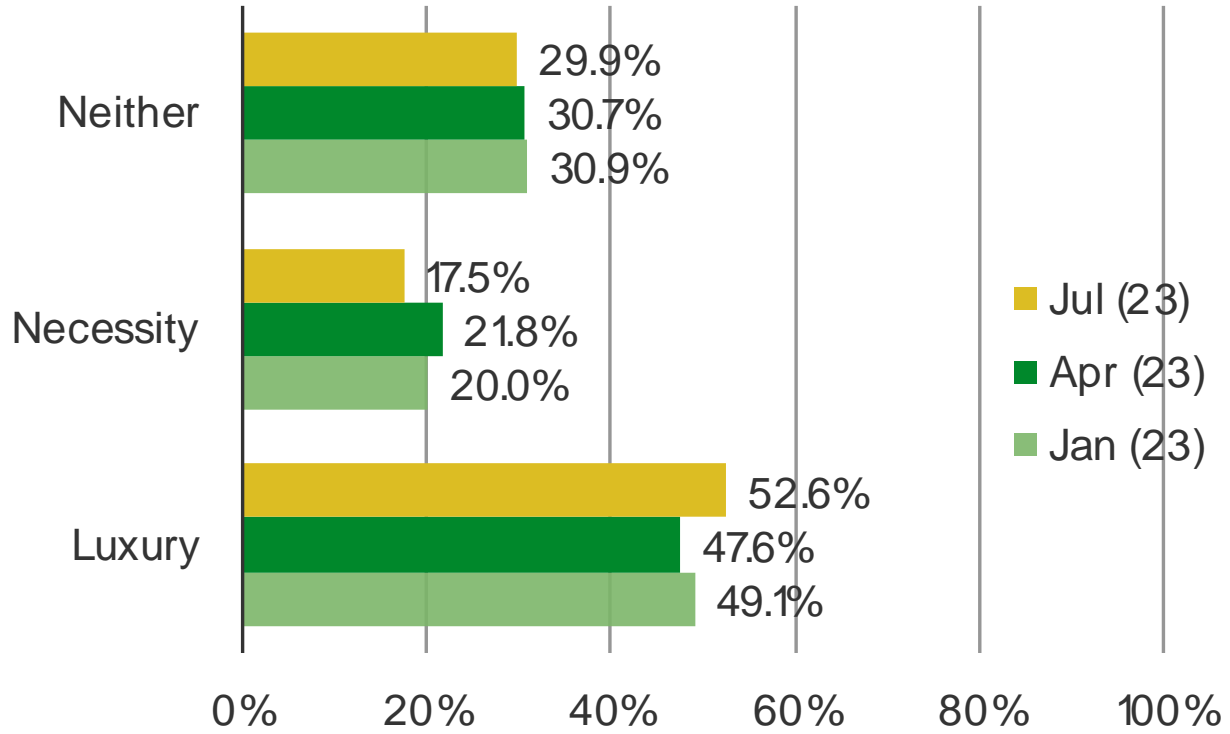
PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH who prefer Uber Eats

I've had the best experiences with them and their service
Because I love it
Because I've been using it longer
Because it better
because it is the one i prefer
Because it's the better of the two
Because they always on time
Because they are so reliable.
Because they are very much reliable and trustworthy
Because they have a good delivery service comparing to the others
Because Uber Eats provides best of quality.
Becouse I like very much
best restaurant selection
Better choices an cheaper fees
better pricing and deliverer
Better rewards program.
Better selection and price
better service and more deals
Cheaper
Ease of use
Fast service
for better quality food
Godd value for the money, great customer service, reliable, consistent
Good delivery fees
good service
Good service
Great service
Great services
Have good quality foods
I don't know
I have been using them the longest
I have the best service and discounts
I have used it longer and it works well for me
I have used them for years
I like it
I like it
I like it
I like their drivers more.
i live it
I think it's the best
I trust them more
I use there ride app
Is quite reliable and trustworthy
It a great app

It has the best service
it is my preferred method
It is reliable for me and has good service.
It is the best and I use more often
It is the best app
It is the most accurate and trustworthy
It offers the most amount of restaurants to choose from
It provides the most free/low fee delivery options and the best selection of restaurants.
It what I use most
It's better
It's good
it's so good
It's the best
It's a reliable and genuine source
It's better
It's the fastest service I've used, even if it does tend to be more expensive
its the one that's given me the least problems and its the most advanced and convenient to use and contact my courier
less expensive, drivers tend be more vocal if delays
Love them
More comfortable in knowing I'll get quality food and service when ordering with them.
More professional customer service
More restaurants
Price
quality
quickly ship my order
The great deals they have
Their fees are reasonable.
there app is way better
They are quick inexpensive and very punctual
They are the most reliable
They have better service
they're faster
Uber Eats has better restaurant options for my household because they're picky eaters.
Uber eats I just like the app easy to use
UberEats is cheaper
Very Efficient And Reliable
Very fast delivery and take care of your food
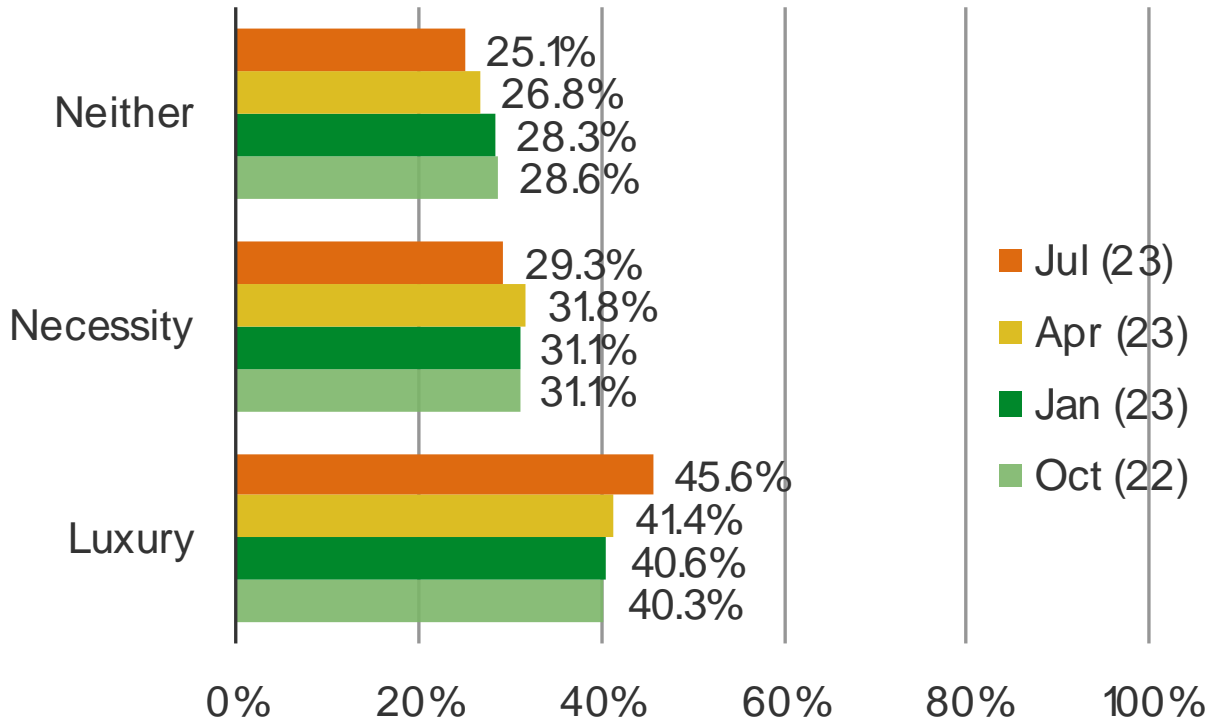
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.

Neither
- 29.9% (Jul 23)
- 30.7% (Apr 23)
- 30.9% (Jan 23)

Necessity
- 17.5% (Jul 23)
- 21.8% (Apr 23)
- 20.0% (Jan 23)

Luxury
- 52.6% (Jul 23)
- 47.6% (Apr 23)
- 49.1% (Jan 23)

Legend:
- Jul (23)
- Apr (23)
- Jan (23)

DO YOU VIEW GROCERY DELIVERY AS MORE OF A...

Posed to all respondents.

Neither
- 25.1%
- 26.8%
- 28.3%
- 28.6%

Necessity
- 29.3%
- 31.8%
- 31.1%
- 31.1%

Luxury
- 45.6%
- 41.4%
- 40.6%
- 40.3%

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
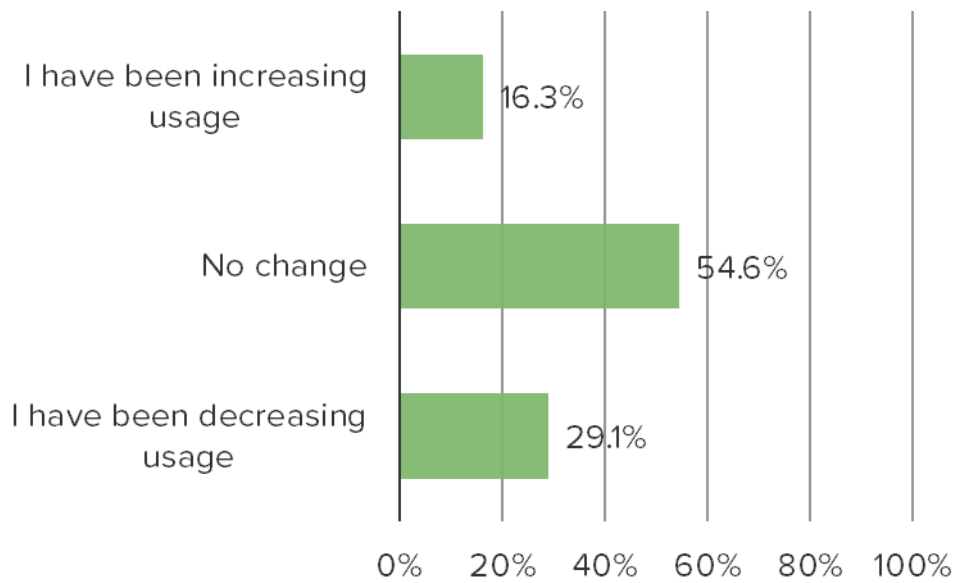- Oct (22)

HAVE YOU RECENTLY BEEN CHANGING HOW OFTEN YOU USE FOOD DELIVERY APPS?

Posed to respondents who use food delivery apps.
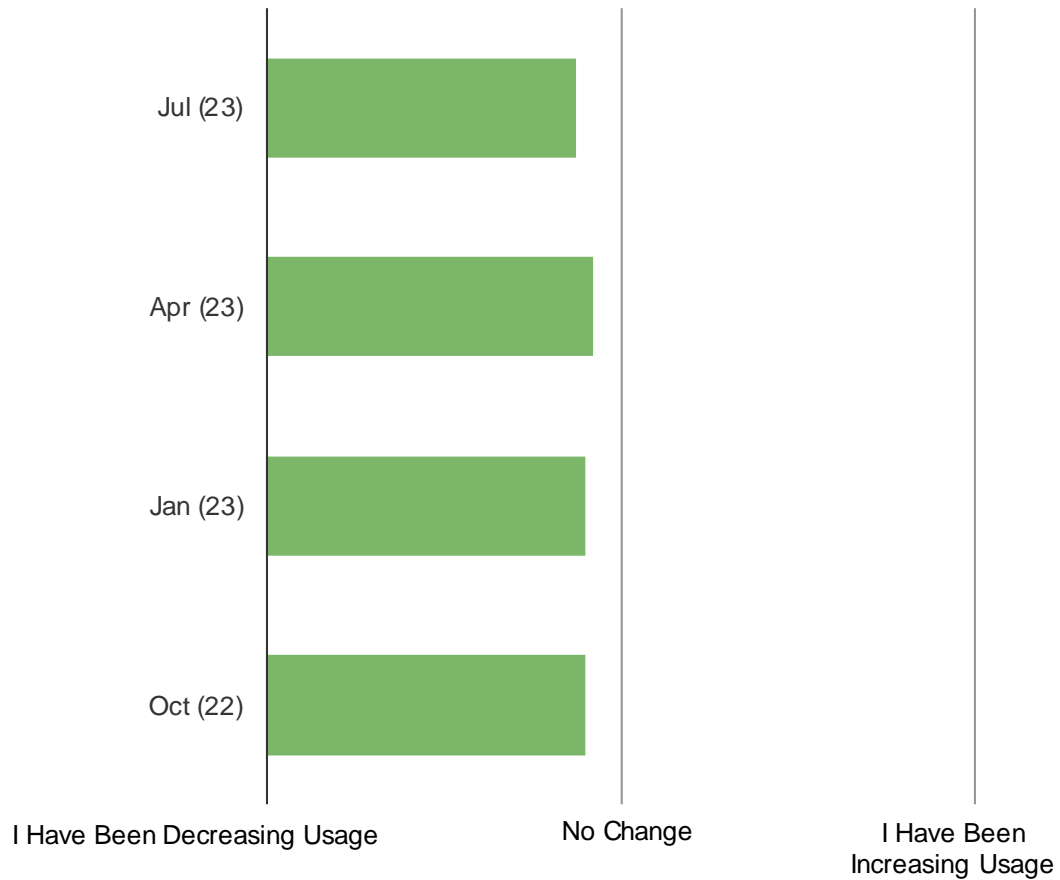
July 2023 Data

USAGE TRENDS AND SENTIMENT READINGS

HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)
- Jul (19)
- Apr (19)
- Jan (19)
- Oct (18)
- Jul (18)

Categories: Very Frequently (9.6%), Frequently (16.2%), Somewhat Frequently (25.9%), Infrequently (25.4%), Never (22.8%)
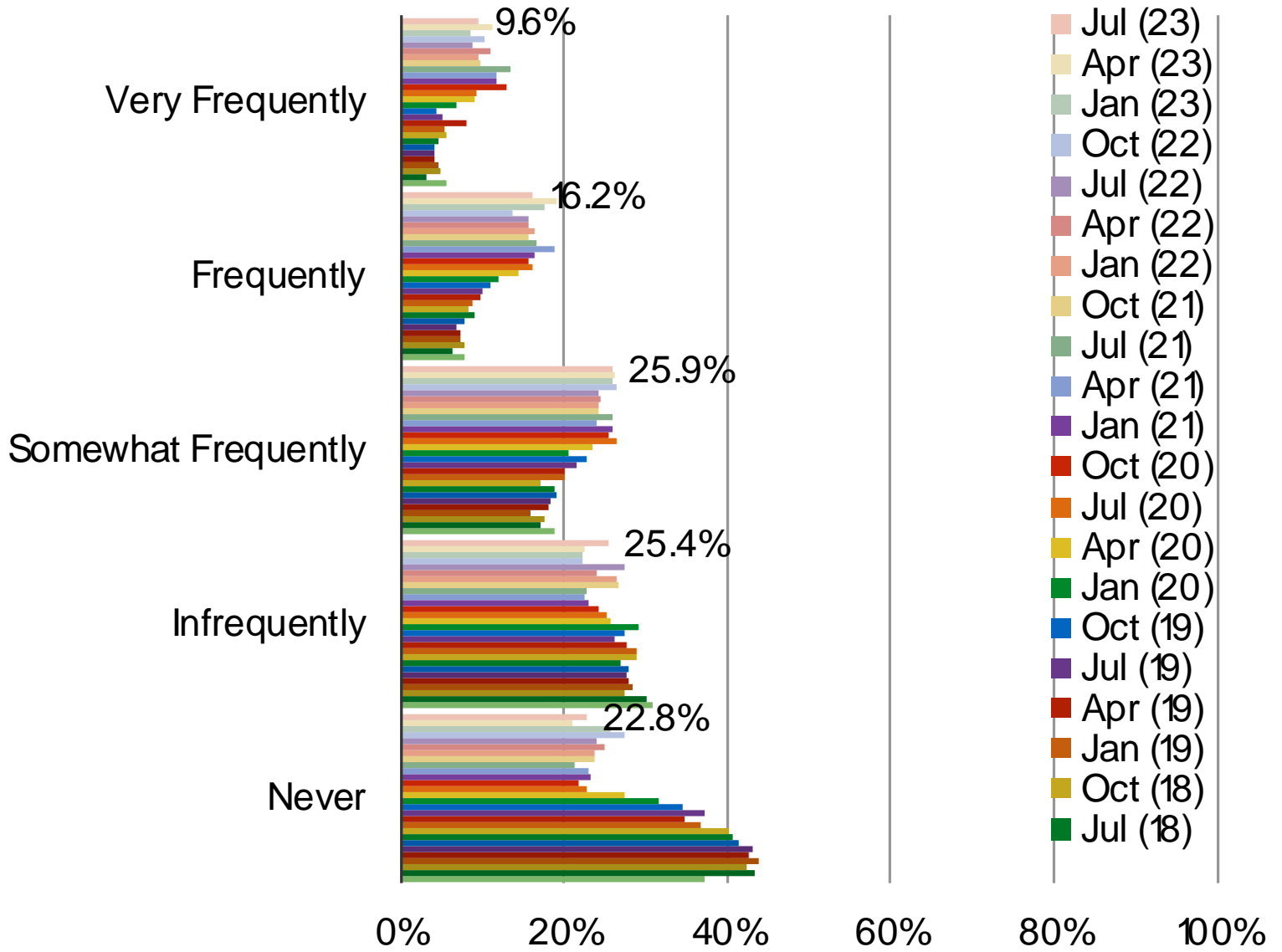
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.
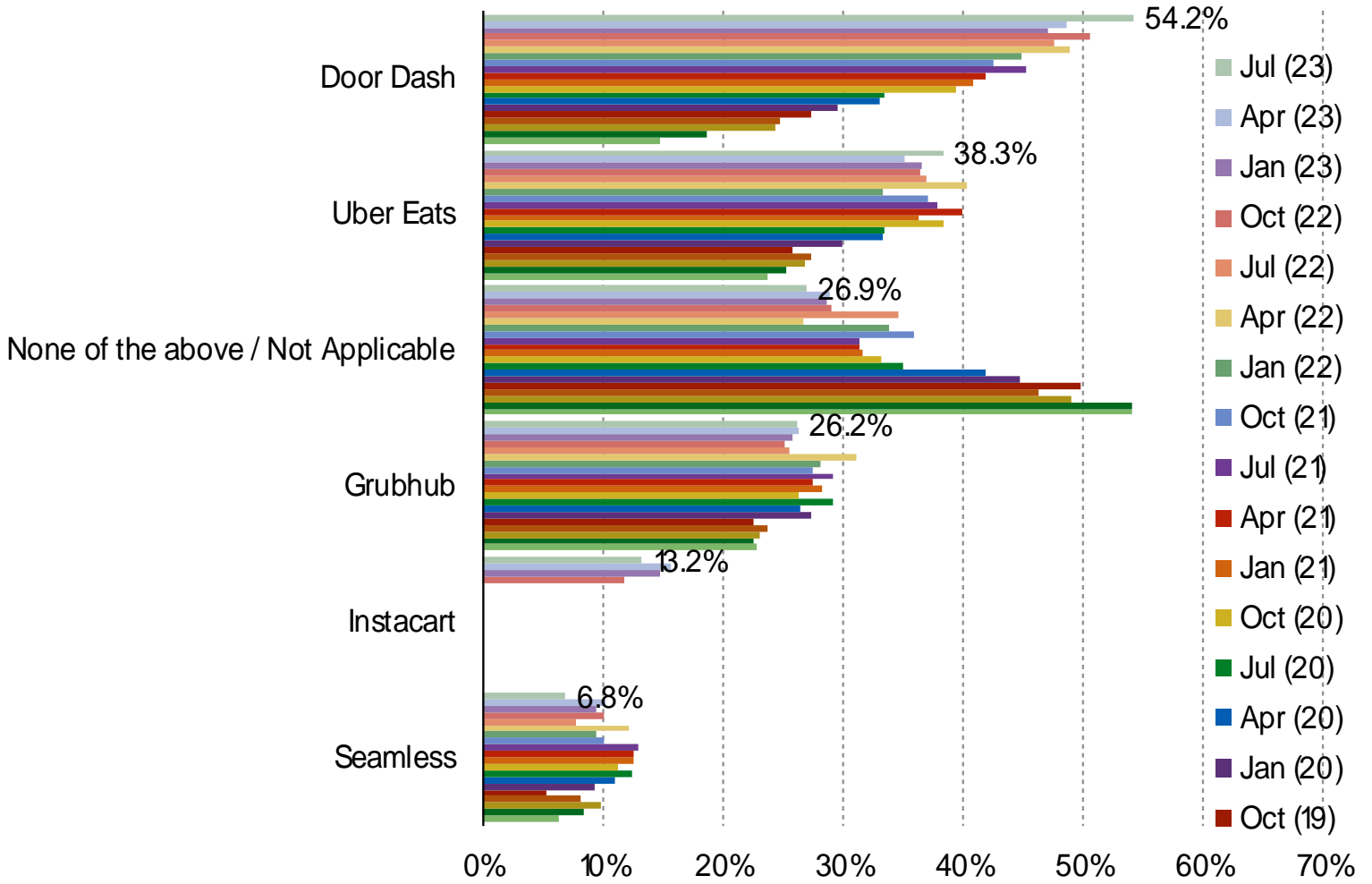
N = 1250

DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING PLATFORMS FOR ORDERING TAKEOUT FOOD DELIVERY?

Posed to respondents who use food delivery apps.

N = 965

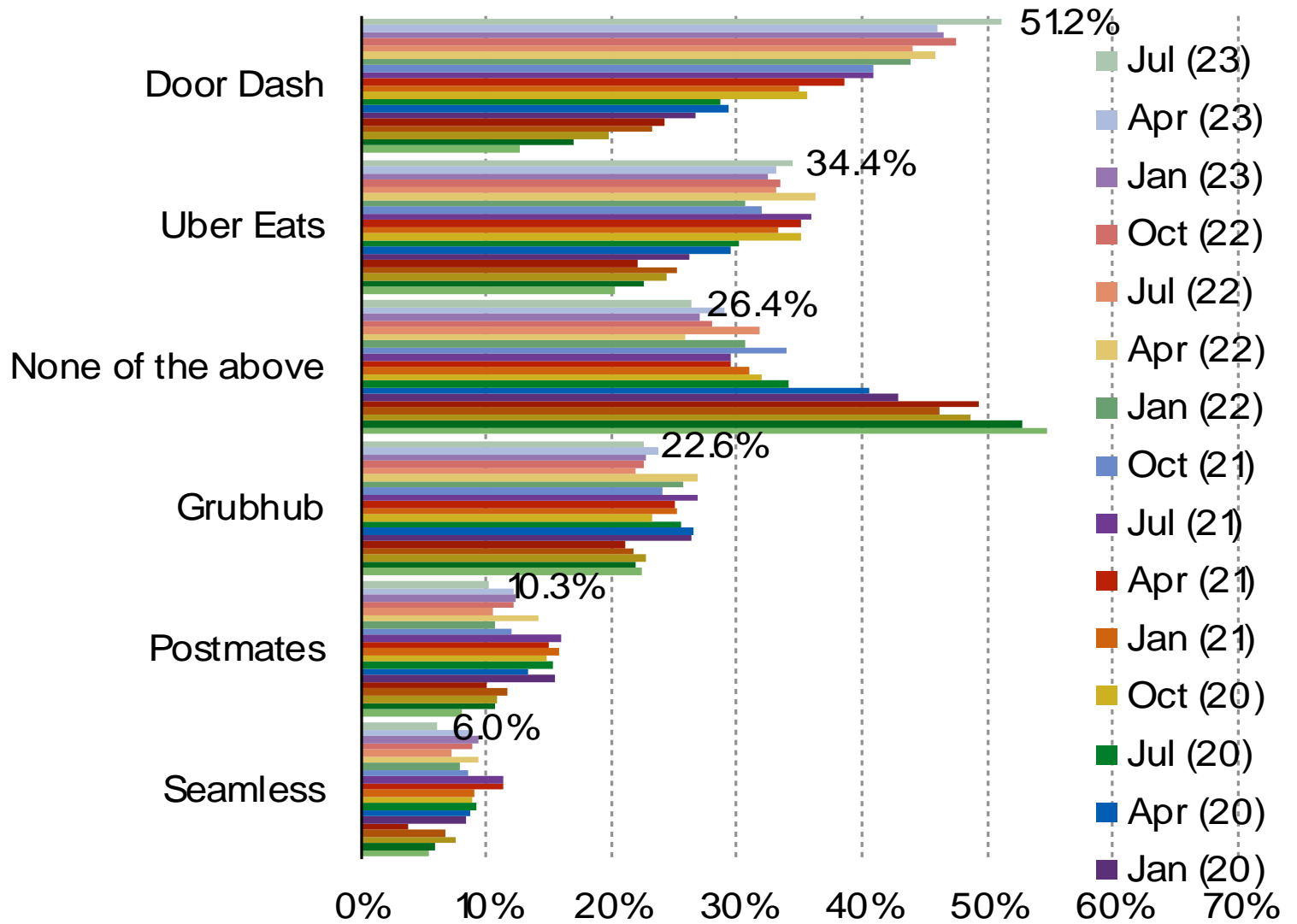**CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?**

Posed to respondents who use food delivery apps.

Uber Eats Users Also Use
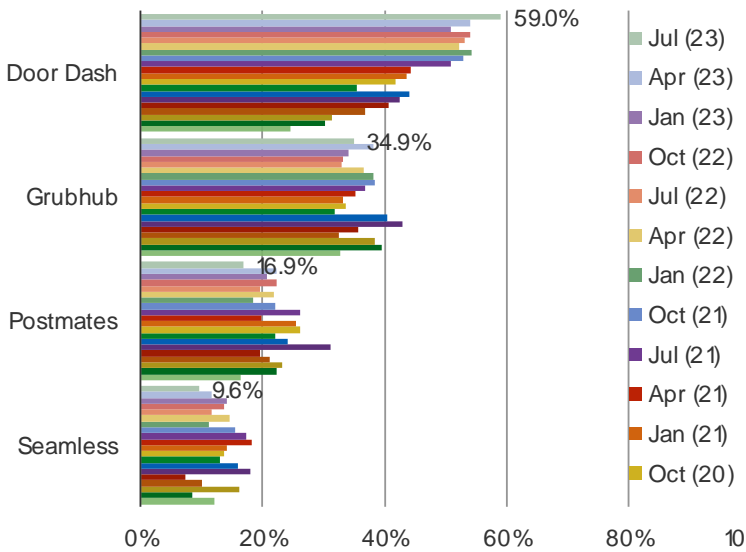
Door Dash Users Also Use
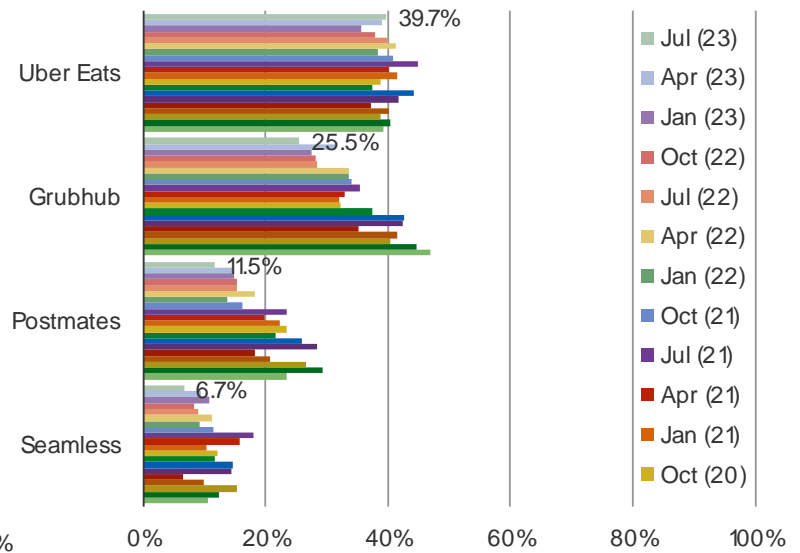
GrubHub Users Also Use
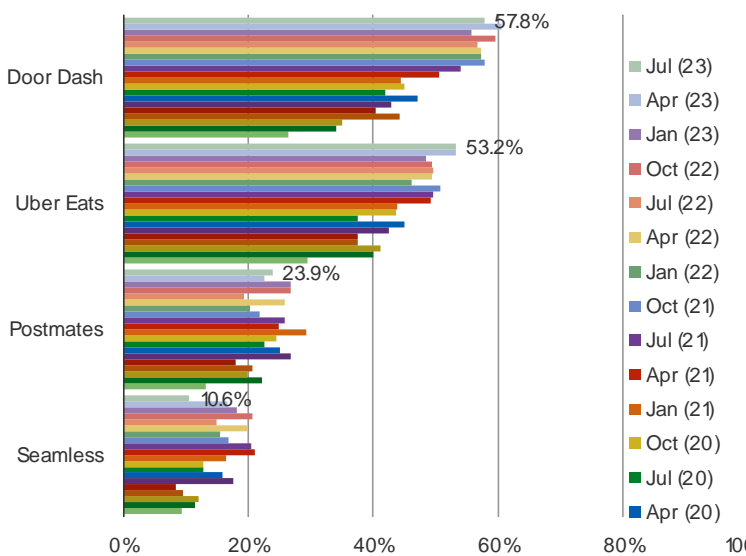
Postmates Users Also Use
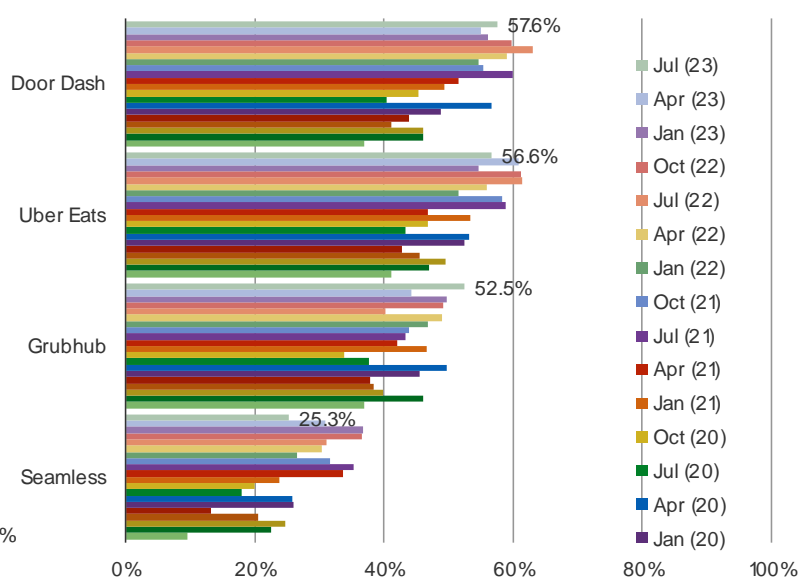
	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

WHAT IS THE MOST IMPORTANT FEATURE IN DECIDING WHICH FOOD DELIVERY/TAKEAWAY APP TO USE?

Posed to respondents who use food delivery apps.
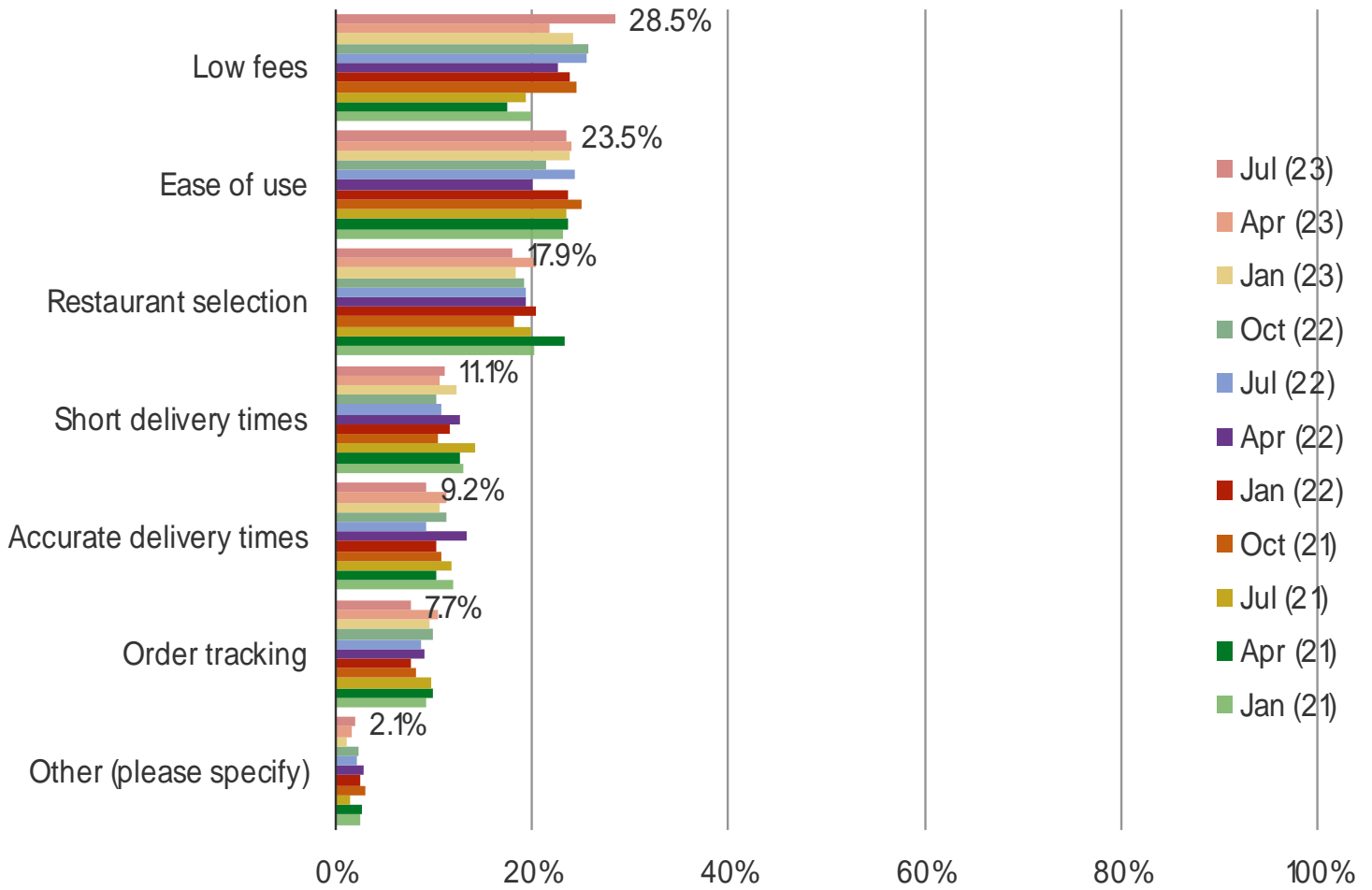
N = 965

PLEASE RATE HOW GOOD THE FOLLOWING ARE WHEN IT COMES TO USER EXPERIENCE:

Posed to respondents who have the following downloaded on their smartphone.
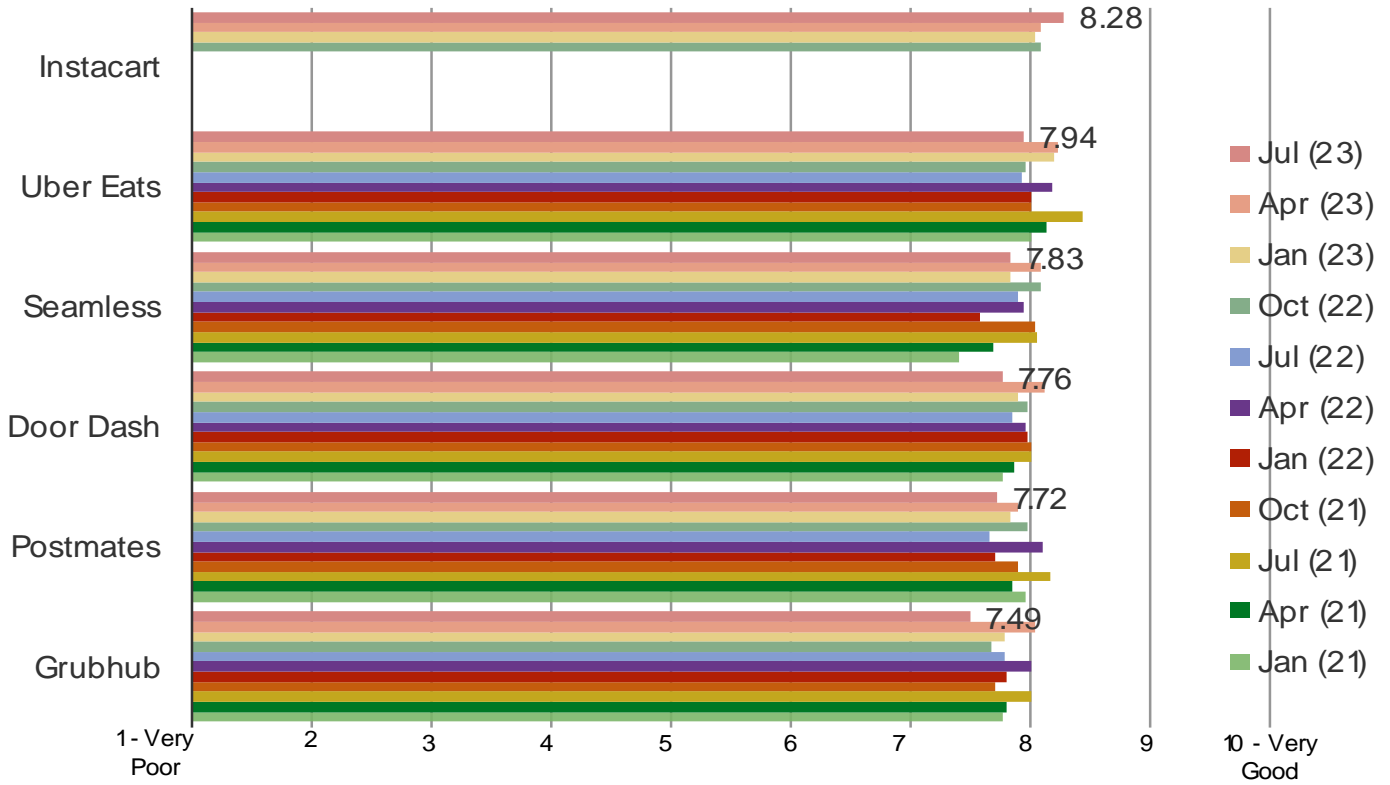
	N=
Uber Eats	370
Door Dash	523
Seamless	66
Grubhub	253
Postmates	102
Instacart	127

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

Posed to respondents who have the following downloaded on their smartphone.
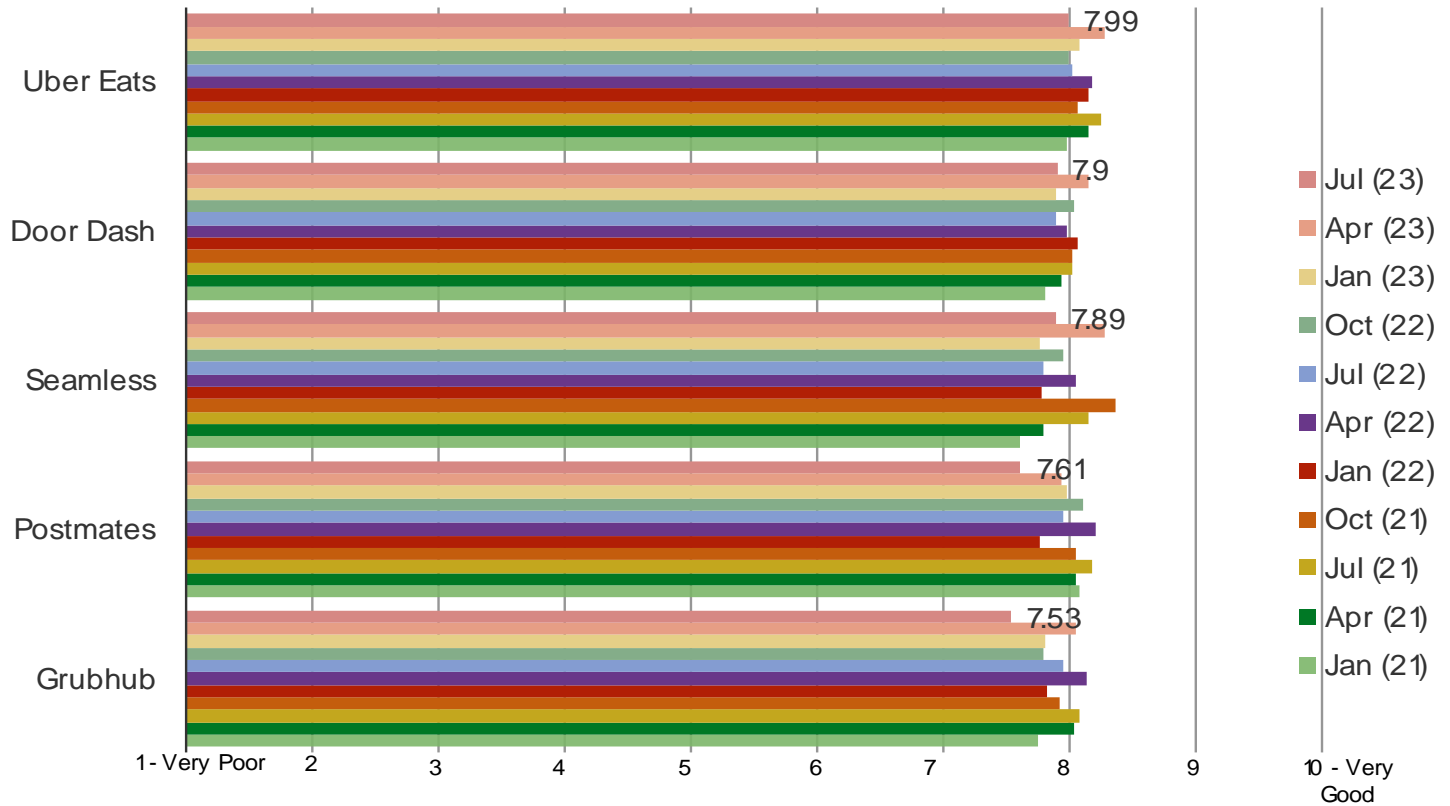
Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

	N=
Uber Eats	370
Door Dash	523
Seamless	66
Grubhub	253
Postmates	102
Instacart	127

PLEASE RATE THE FOLLOWING WHEN IT COMES TO FEES...

Posed to respondents who have the following downloaded on their smartphone.
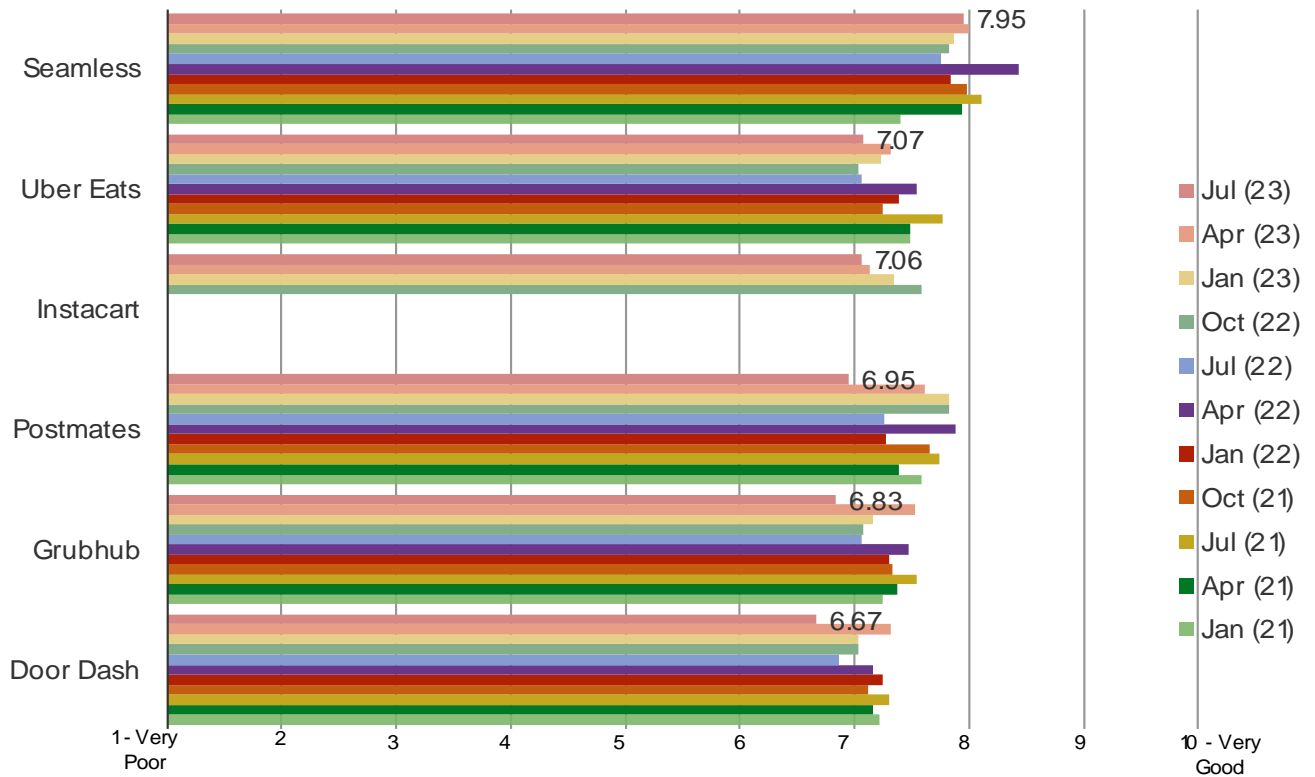
Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Seamless: 7.95
Uber Eats: 7.07
Instacart: 7.06
Postmates: 6.95
Grubhub: 6.83
Door Dash: 6.67

X-axis: 1 - Very Poor ... 10 - Very Good

	N=
Uber Eats	370
Door Dash	523
Seamless	66
Grubhub	253
Postmates	102
Instacart	127

WHAT PERCENTAGE OF YOUR FOOD DELIVERY/TAKEAWAY ORDERS DO YOU MAKE THROUGH THE FOLLOWING?

Posed to respondents who have the following downloaded on their smartphone.
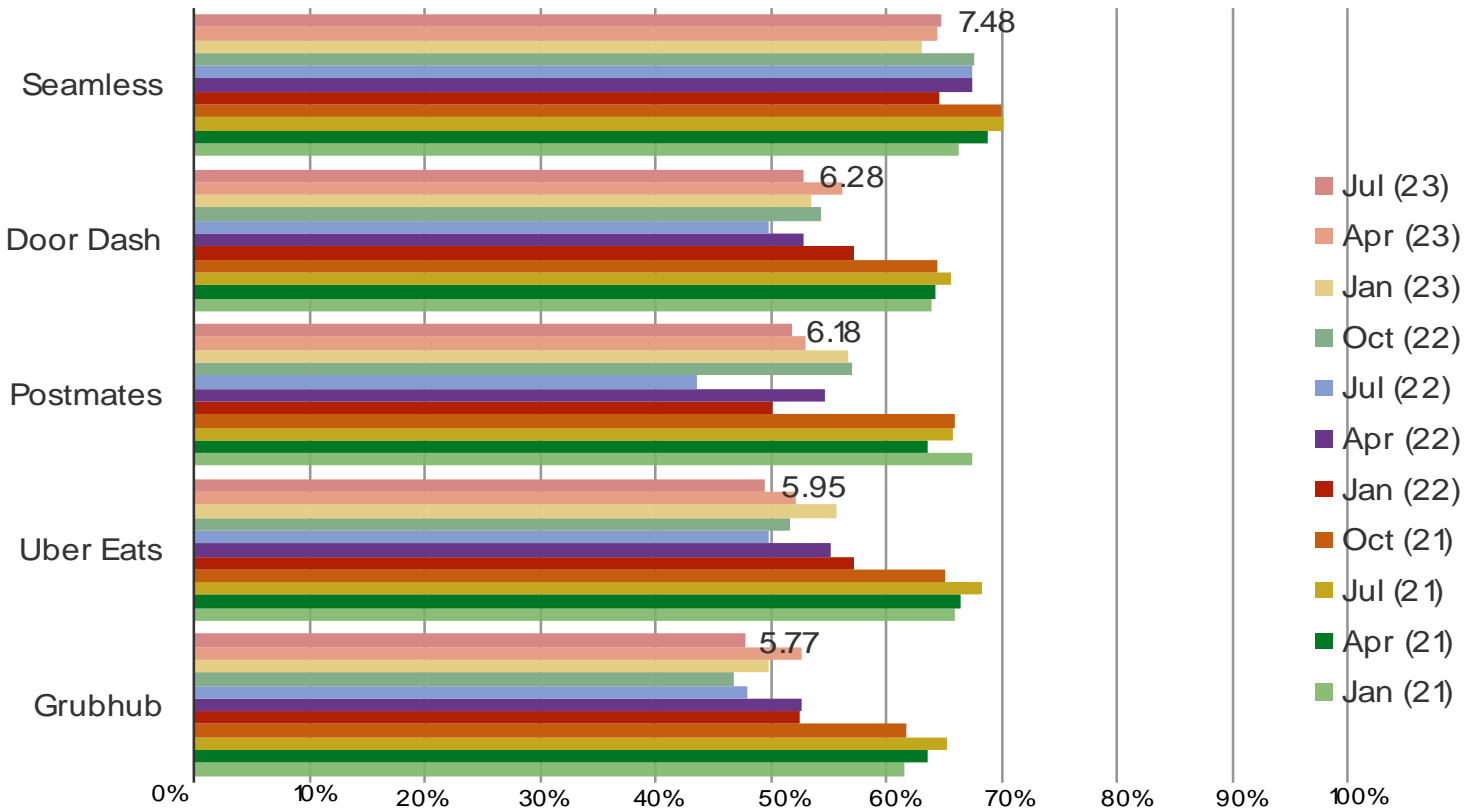
	N=
Uber Eats	370
Door Dash	523
Seamless	66
Grubhub	253
Postmates	102
Instacart	127

WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)

Door Dash: 32.1%
Uber Eats: 15.9%
Grubhub: 6.4%
McDonald's: 5.3%
Domino's: 2.3%
Chick-Fil-A: 1.6%
Pizza Hut: 1.1%
Chipotle: 1.1%
Postmates: 0.5%
Starbucks: 0.3%
Papa John's: 0.3%
Panera Bread: 0.3%
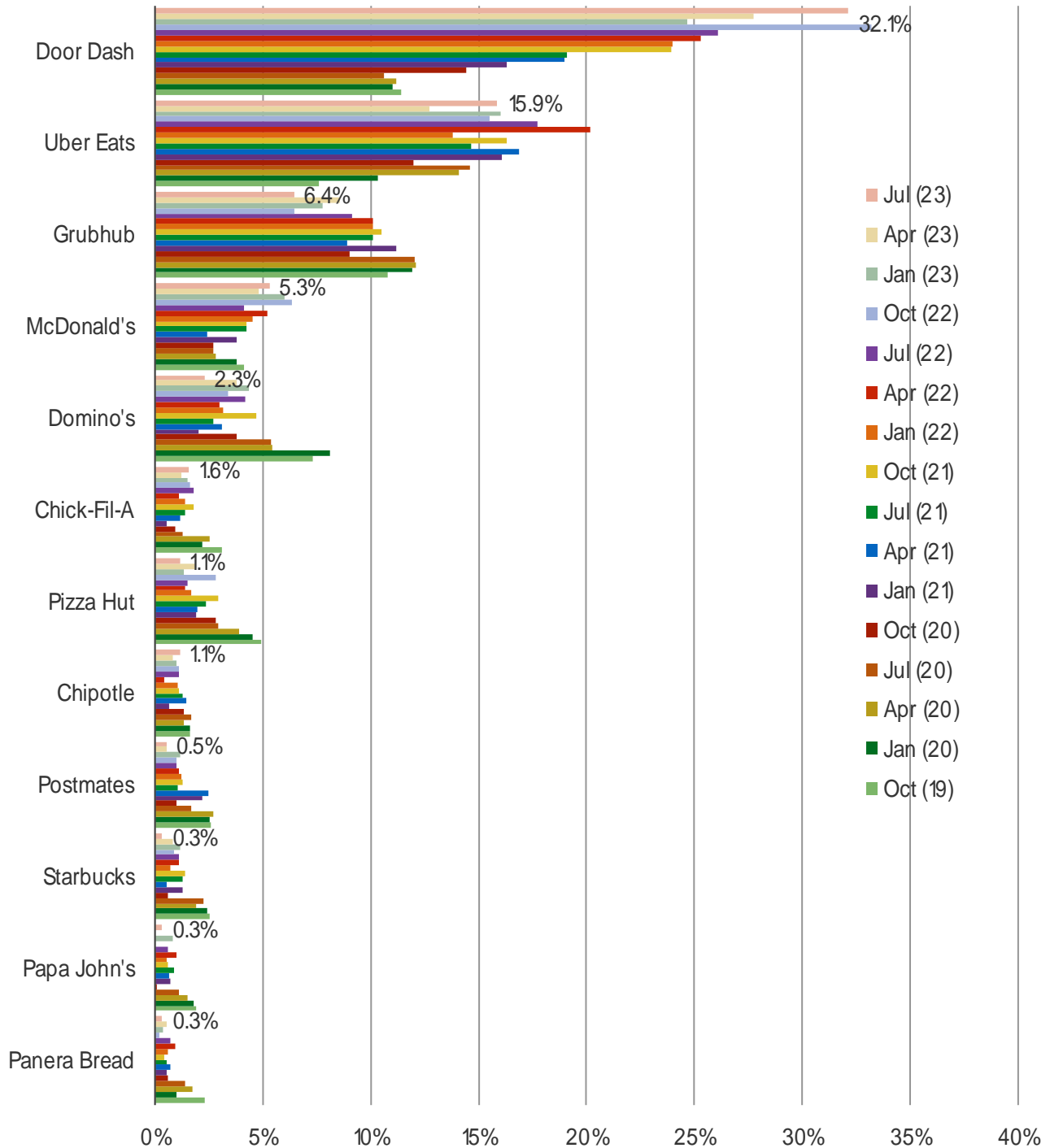
WHAT IS YOUR OPINION OF THE PLATFORM?

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

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)
- Jul (19)
- Apr (19)
- Jan (19)

Chart categories: Uber Eats (4.15), Postmates (4.14), Seamless (4.07), Door Dash (3.98), Grubhub (3.88)

X-axis: Very Negative — Negative — Neutral — Positive — Very Positive
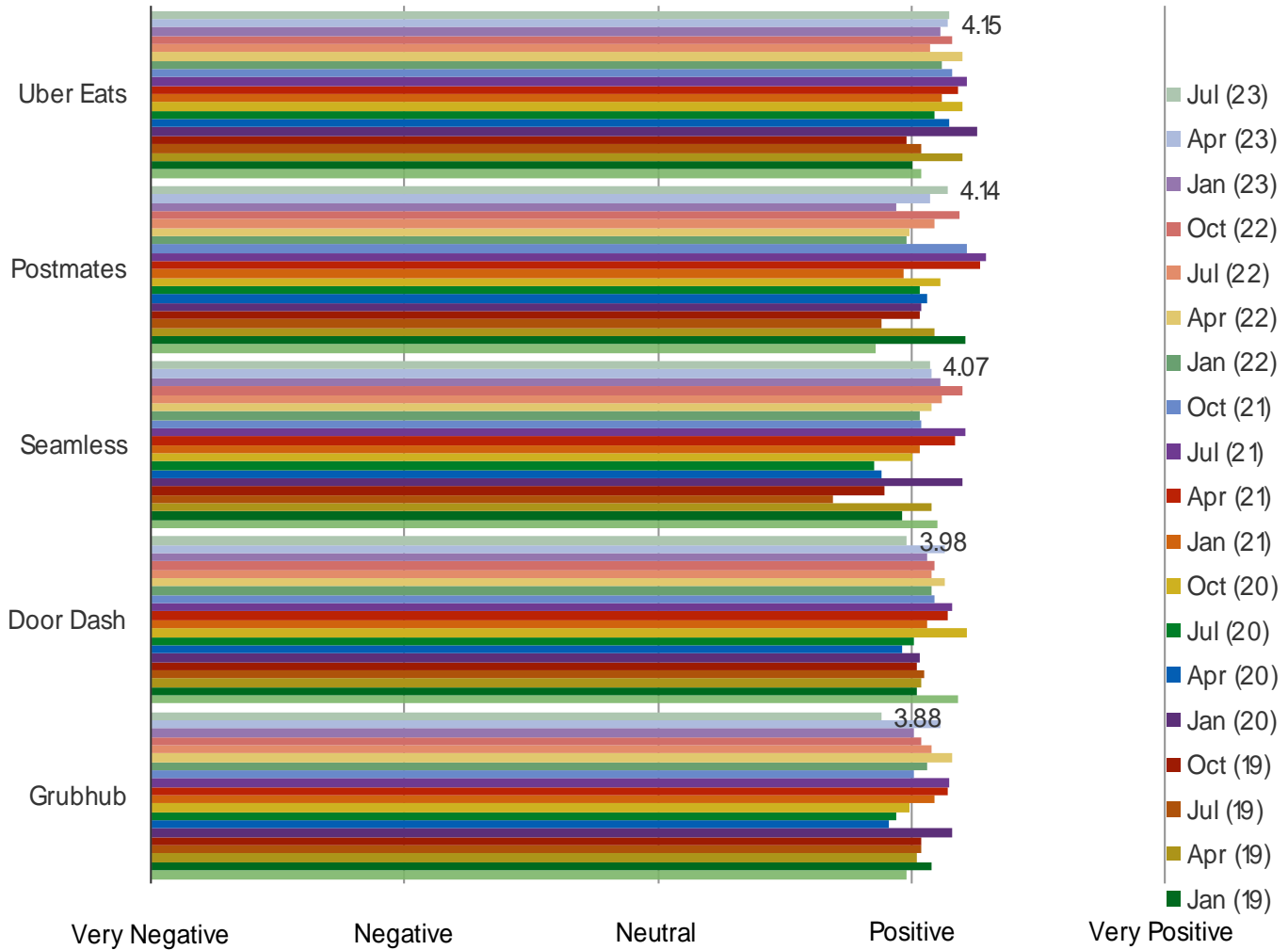
	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

WHEN DID YOU FIRST START USING THIS PLATFORM?

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

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)
- Jul (19)
- Apr (19)
- Jan (19)
- Oct (18)

Chart categories (x-axis): In the past month | In the past three months | In the past year | More than a year ago

Door Dash: 2.82
Grubhub: 2.64
Uber Eats: 2.63
Seamless: 2.41
Postmates: 2.36

	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

Food Delivery
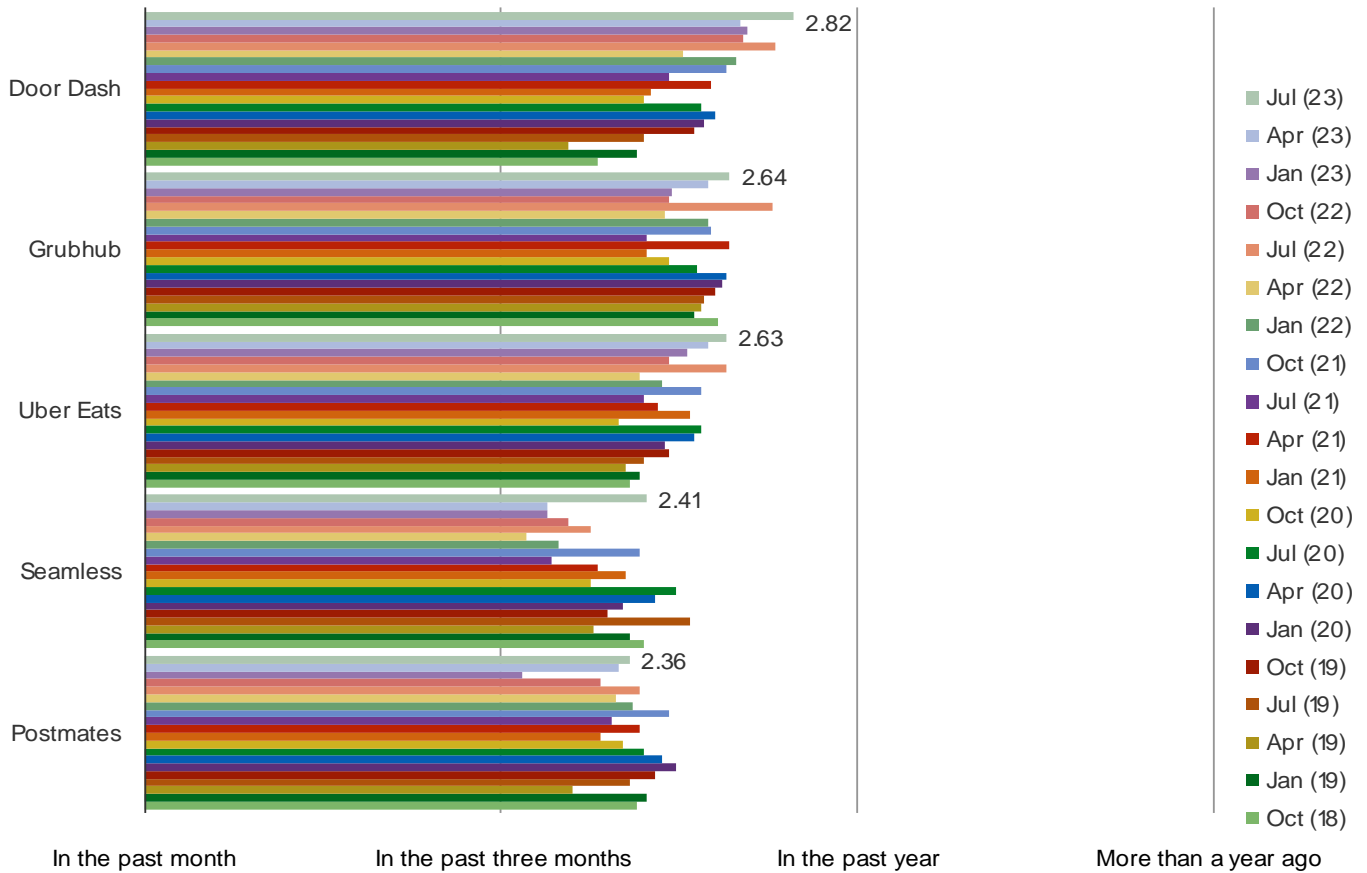
HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)
- Jul (19)
- Apr (19)
- Jan (19)
- Oct (18)

Categories (x-axis): Everyday or nearly everyday — Multiple times per week — Multiple times per month — Around once per month — Less than once per month

Values shown: Grubhub 3.3, Door Dash 3.24, Uber Eats 3.03, Postmates 2.73, Seamless 2.67
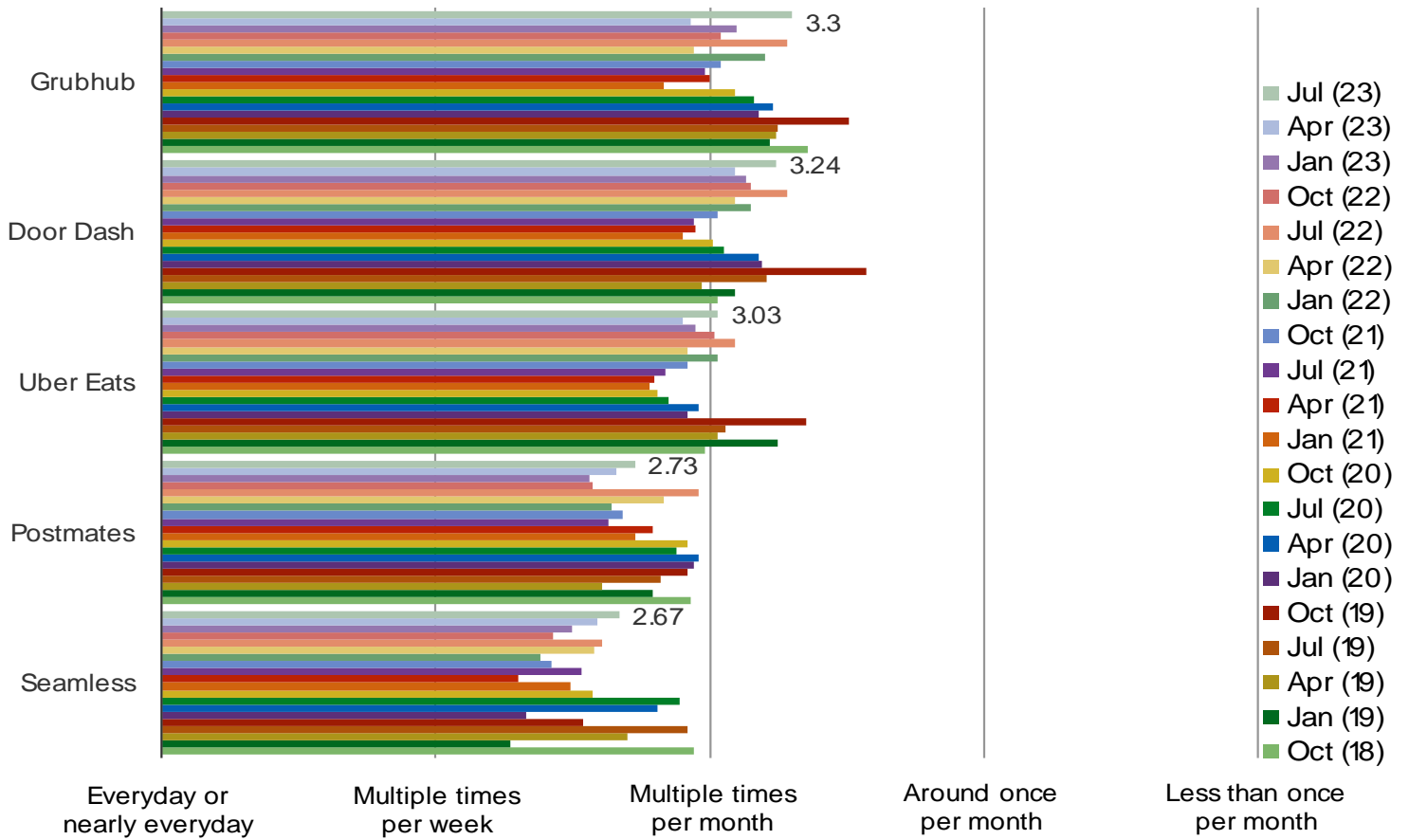
More Frequent

	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

PLEASE RATE THE FOLLOWING WHEN IT COMES TO THE PRICE IT COSTS FOR DELIVERY (DELIVERY CHARGES PLUS ANY TIPS YOU DECIDE TO ADD)

Posed to respondents who regularly or occasionally use each of the following apps.
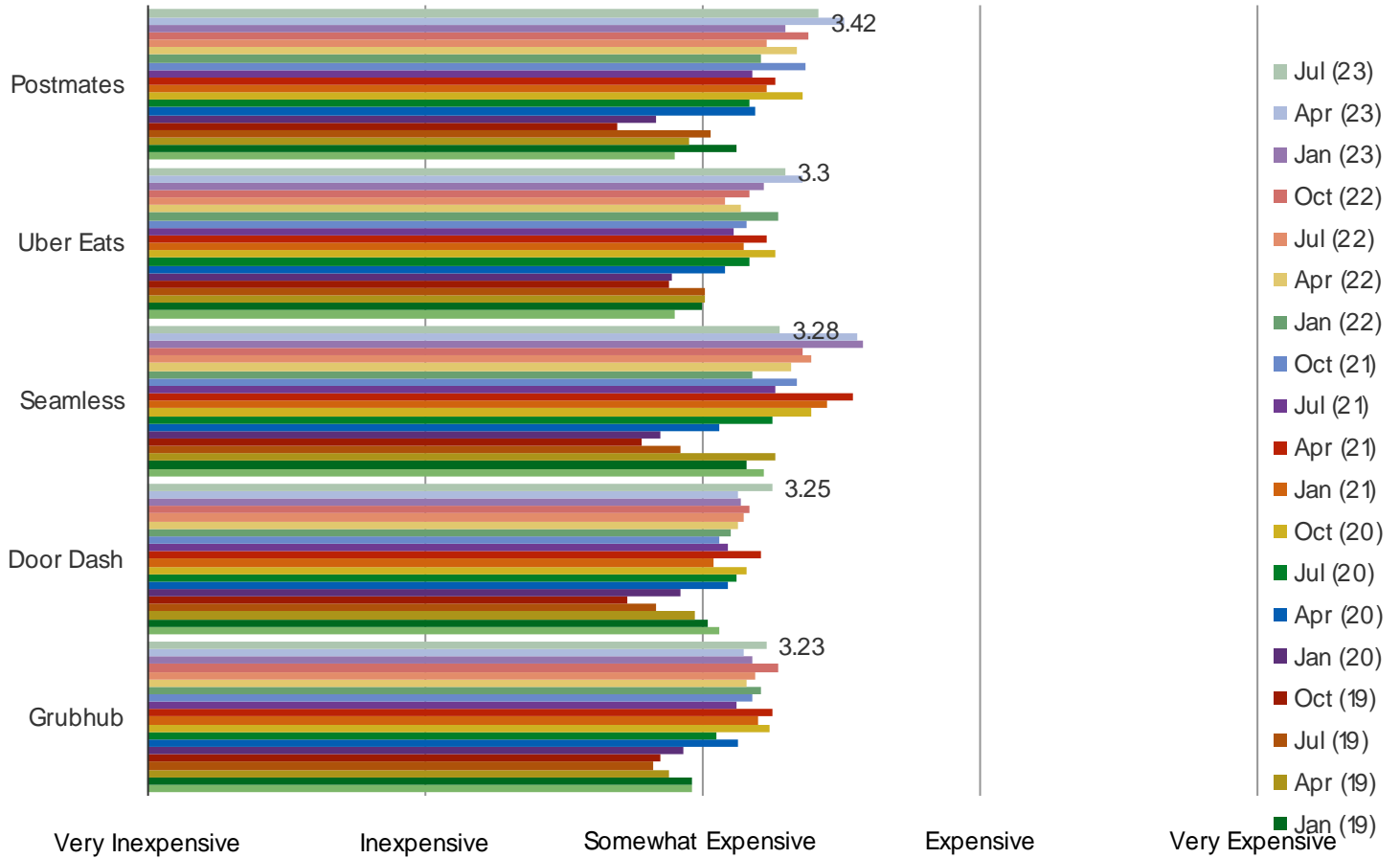
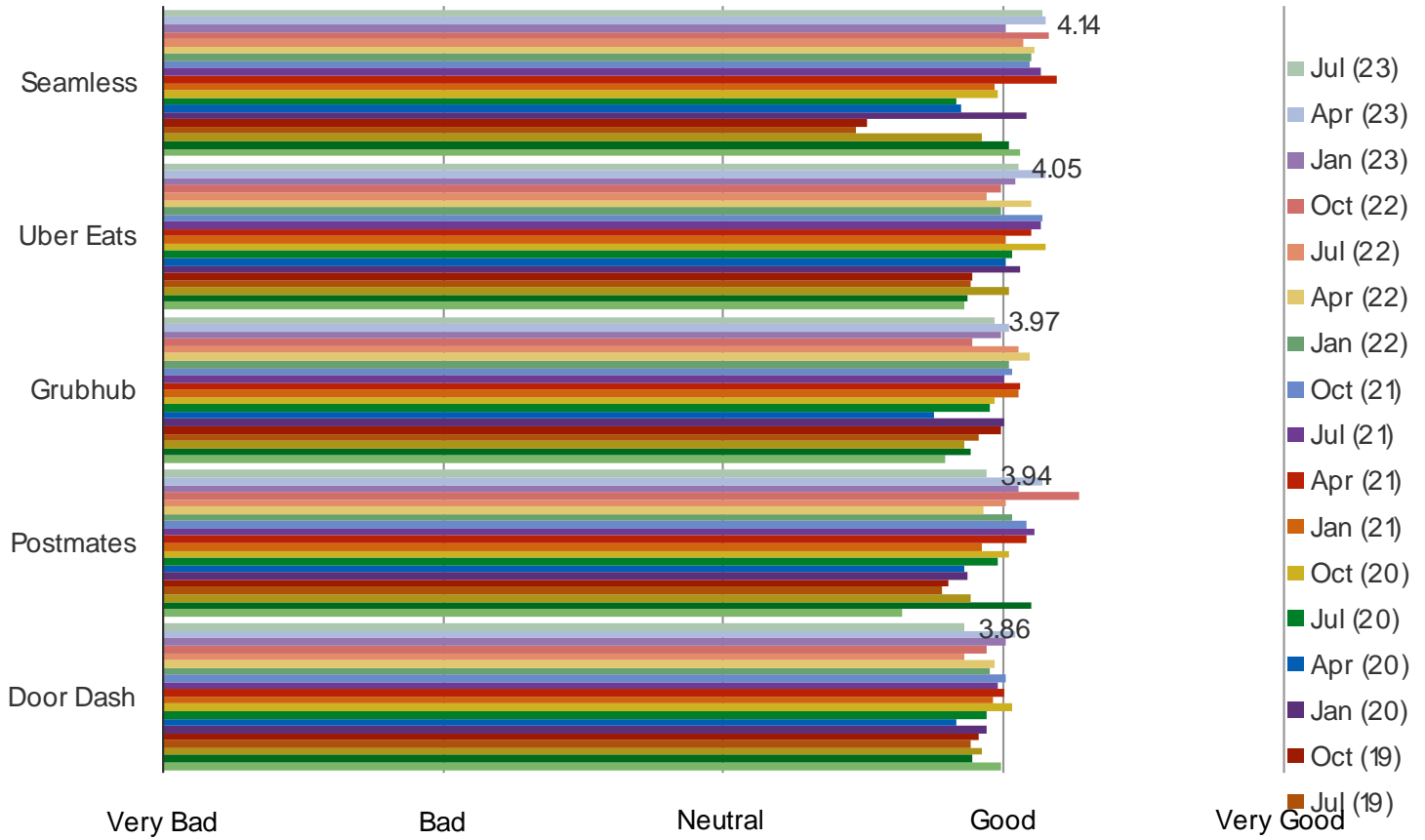|	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

PLEASE RATE THE FOLLOWING WHEN IT COMES TO SPEED AND ACCURACY OF SERVICE.

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

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)
- Jul (22)
- Apr (22)
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
- Oct (20)
- Jul (20)
- Apr (20)
- Jan (20)
- Oct (19)
- Jul (19)

Chart values shown: Seamless 4.14, Uber Eats 4.05, Grubhub 3.97, Postmates 3.94, Door Dash 3.86

Axis labels: Very Bad, Bad, Neutral, Good, Very Good

	N=
Uber Eats	332
Door Dash	494
Seamless	58
Grubhub	218
Postmates	99

Food Delivery

WHEN USING FOOD DELIVERY APPS, HOW IMPORTANT DO YOU THINK IT IS TO BE ABLE TO TRACK THE DRIVER ON A MAP ONCE THEY PICK UP YOUR FOOD?

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

Date	Value
Jul (23)	2.46
Apr (23)	2.5
Jan (23)	2.42
Oct (22)	2.44
Jul (22)	2.45
Apr (22)	2.45
Jan (22)	2.44
Oct (21)	2.45
Jul (21)	2.45
Apr (21)	2.45
Jan (21)	2.41
Oct (20)	2.47
Jul (20)	2.39
Apr (20)	2.42
Jan (20)	2.42
Oct (19)	2.4
Jul (19)	2.4
Apr (19)	2.39
Jan (19)	2.41
Oct (18)	2.37

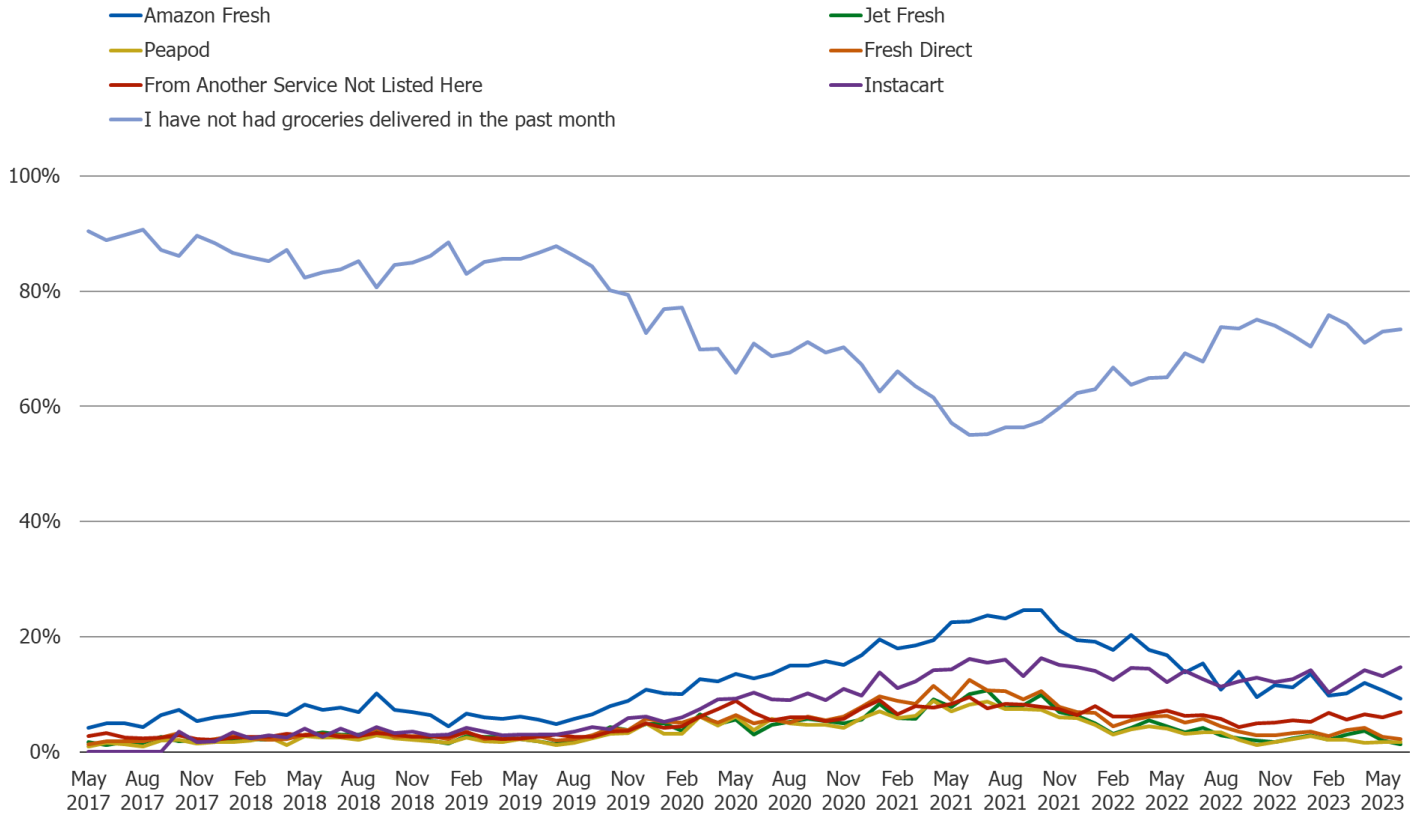Not at all important   Somewhat important   Very important

MONTHLY DATA

DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.

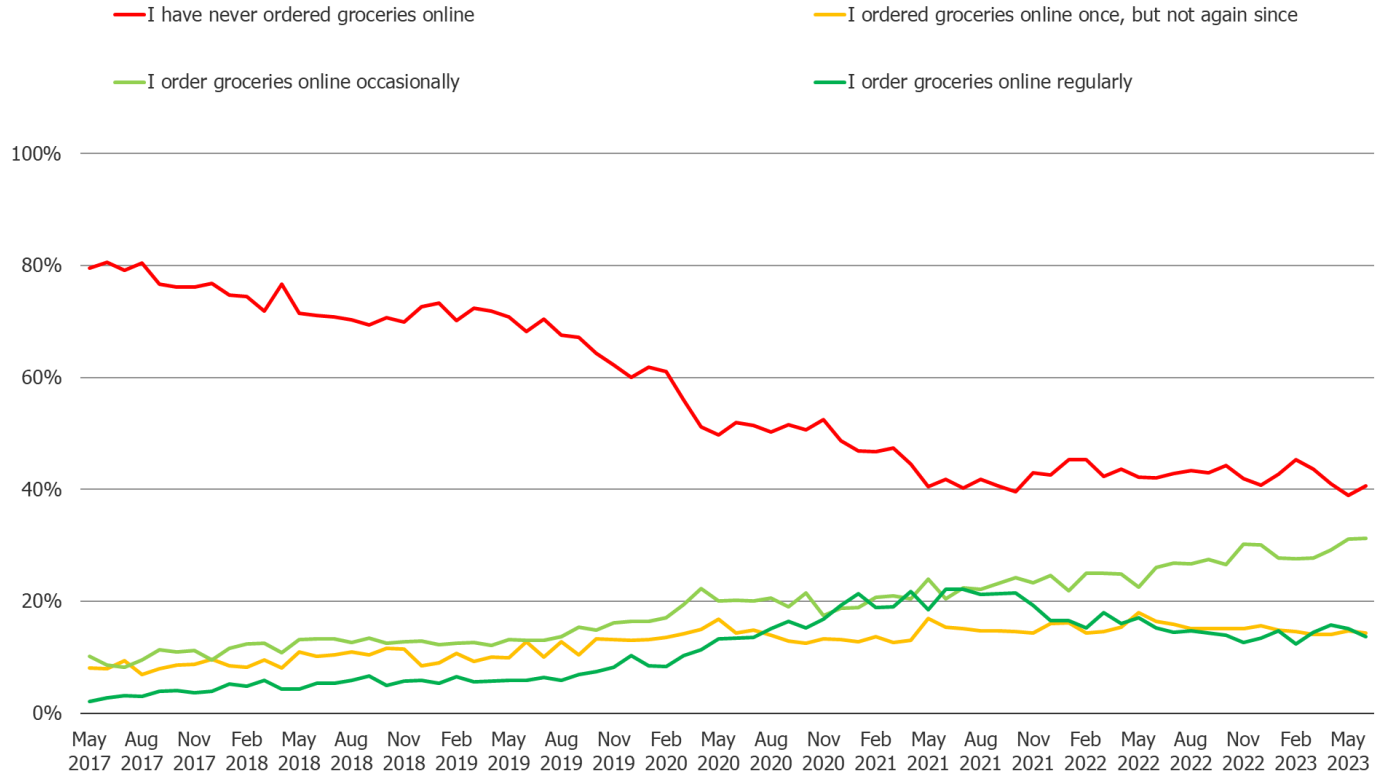## HOW OFTEN DO YOU USE FOOD DELIVERY APPS?

Posed to all respondents.
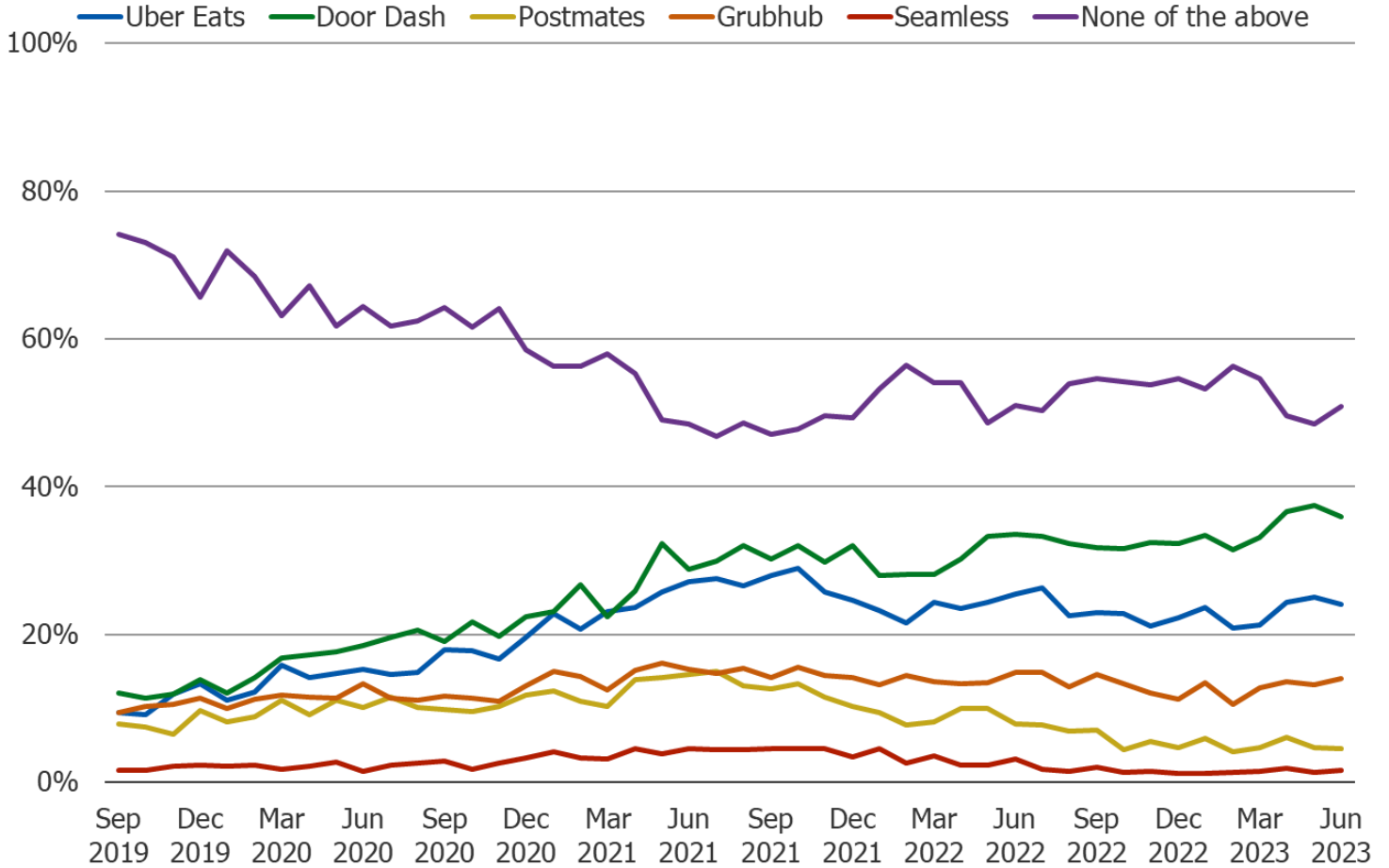
HAVE YOU GOTTEN GROCERIES DELIVERED IN THE PAST MONTH FROM ANY OF THE FOLLOWING? SELECT ALL

Posed to all respondents.

Legend:
- Amazon Fresh
- Jet Fresh
- Peapod
- Fresh Direct
- From Another Service Not Listed Here
- Instacart
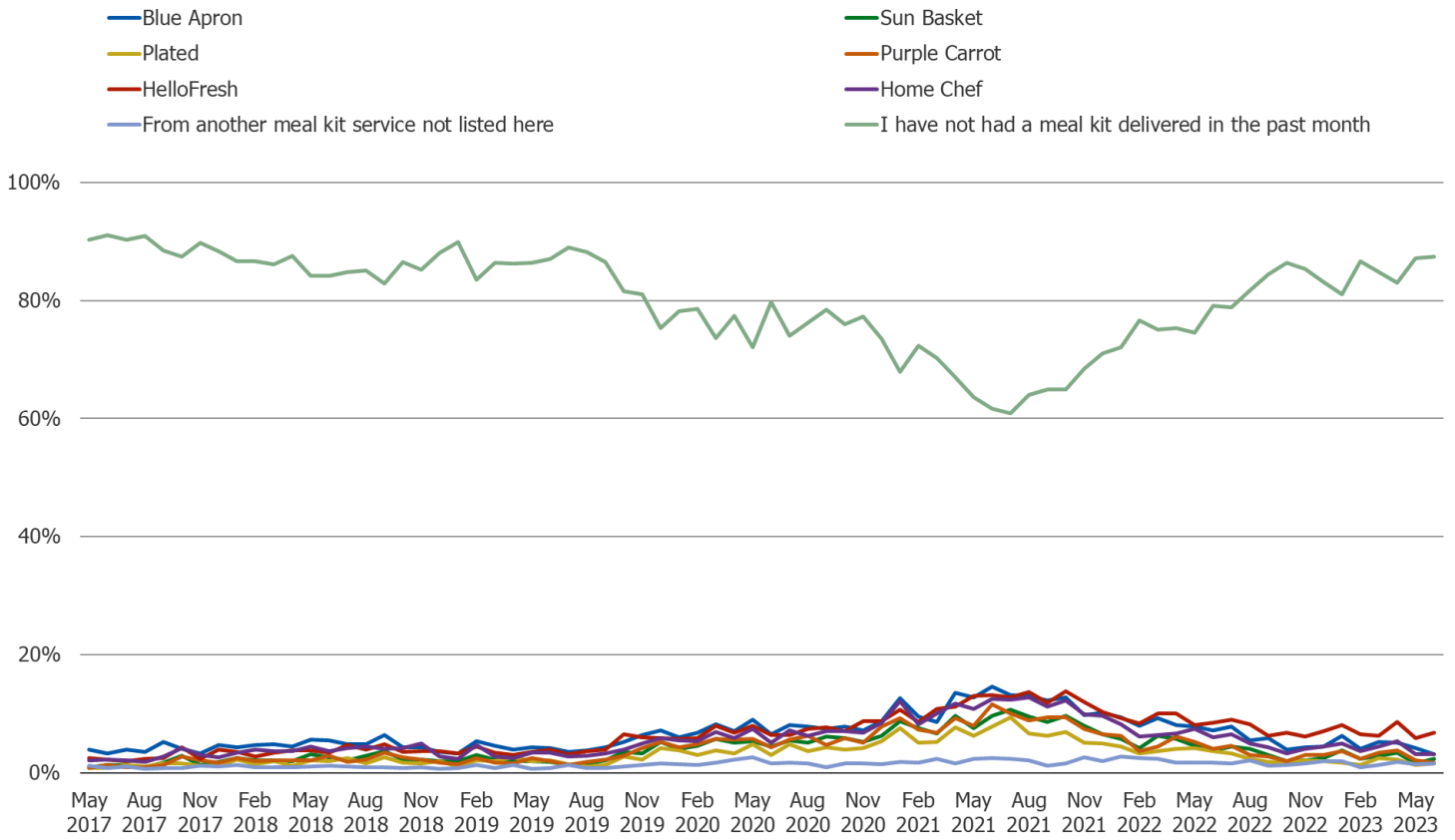- I have not had groceries delivered in the past month

## PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING GROCERIES ONLINE:

Posed to all respondents.

HAVE YOU GOTTEN MEALKITS DELIVERED IN THE PAST MONTH FROM ANY OF THE FOLLOWING? SELECT ALL

Posed to all respondents.

Legend:
- Blue Apron
- Sun Basket
- Plated
- Purple Carrot
- HelloFresh
- Home Chef
- From another meal kit service not listed here
- I have not had a meal kit delivered in the past month

PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING MEALKITS ONLINE:
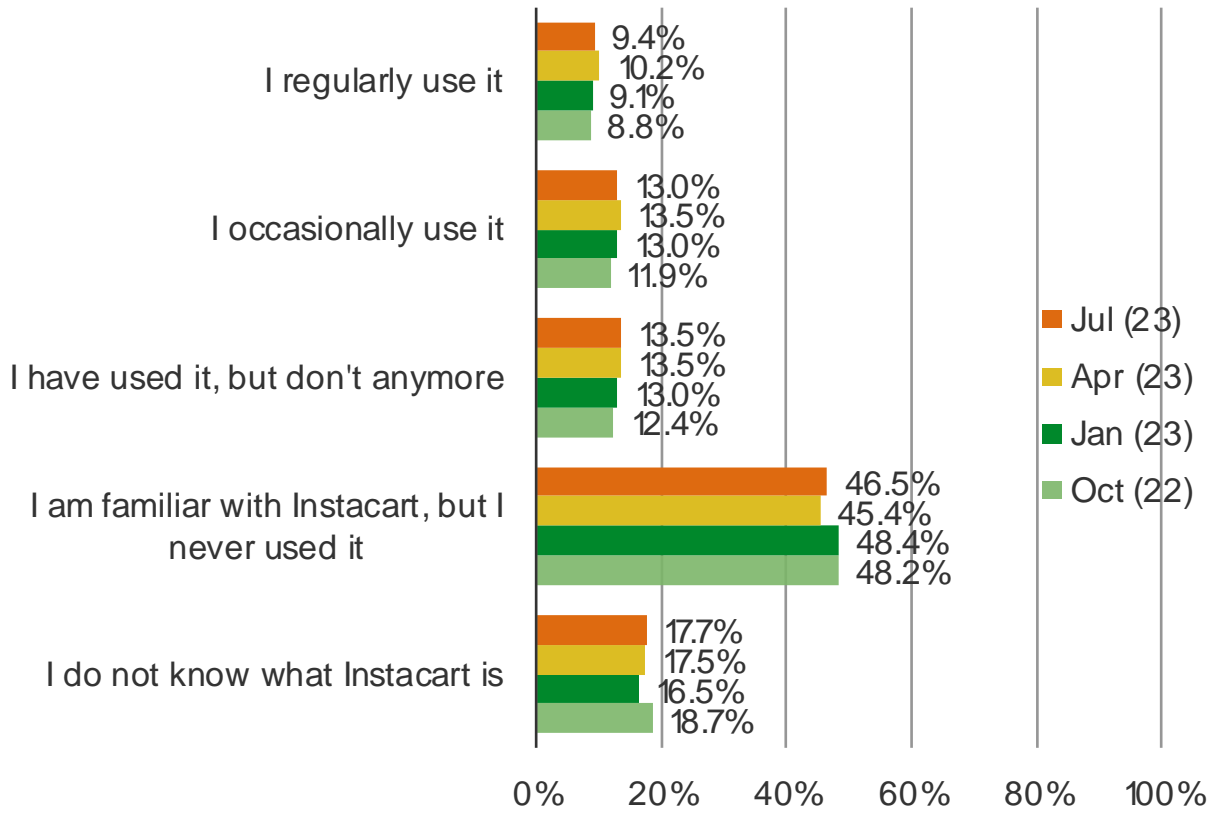
Posed to all respondents.
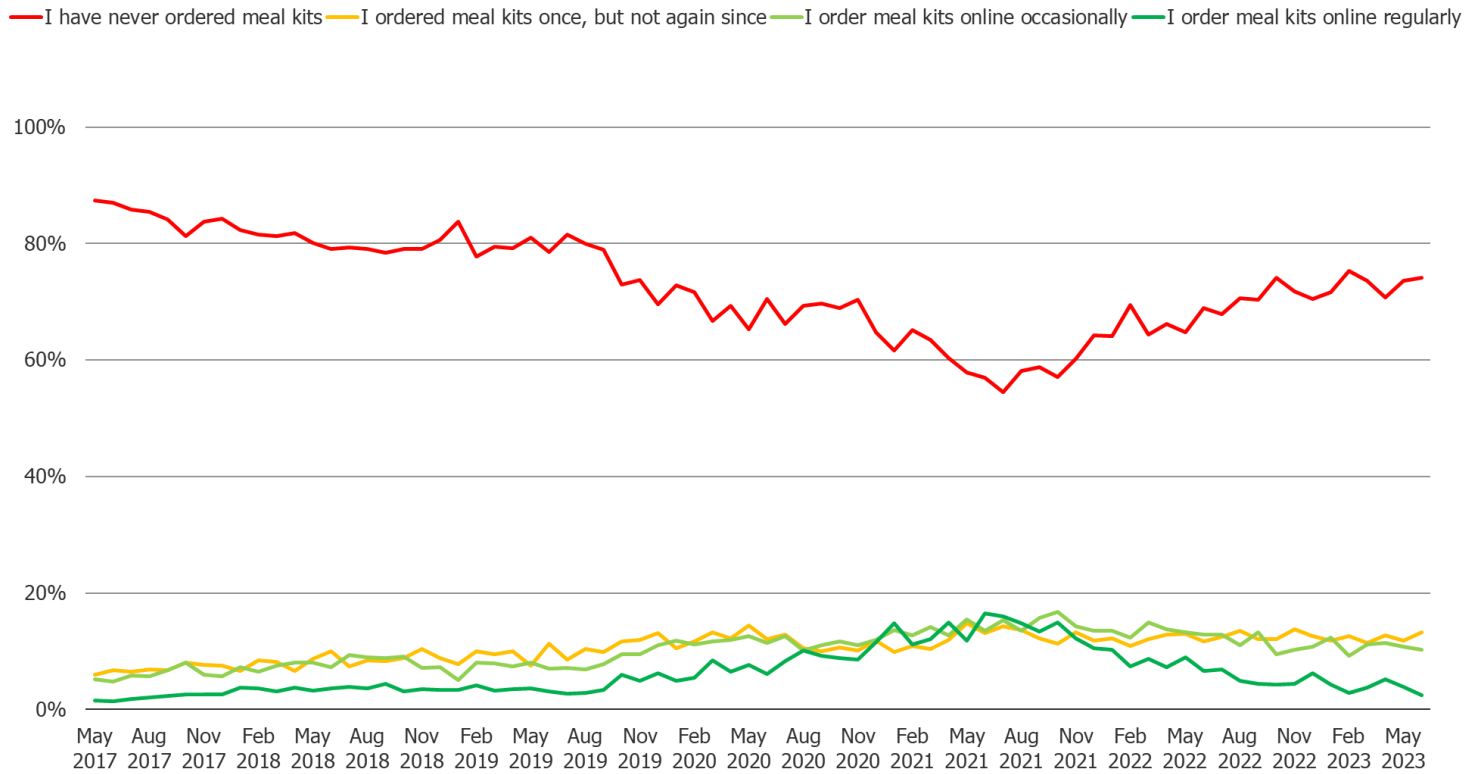
INSTACART

Food Delivery

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

Posed to all respondents.

I regularly use it
- 9.4%
- 10.2%
- 9.1%
- 8.8%

I occasionally use it
- 13.0%
- 13.5%
- 13.0%
- 11.9%

I have used it, but don't anymore
- 13.5%
- 13.5%
- 13.0%
- 12.4%

I am familiar with Instacart, but I never used it
- 46.5%
- 45.4%
- 48.4%
- 48.2%

I do not know what Instacart is
- 17.7%
- 17.5%
- 16.5%
- 18.7%

Legend:
- Jul (23)
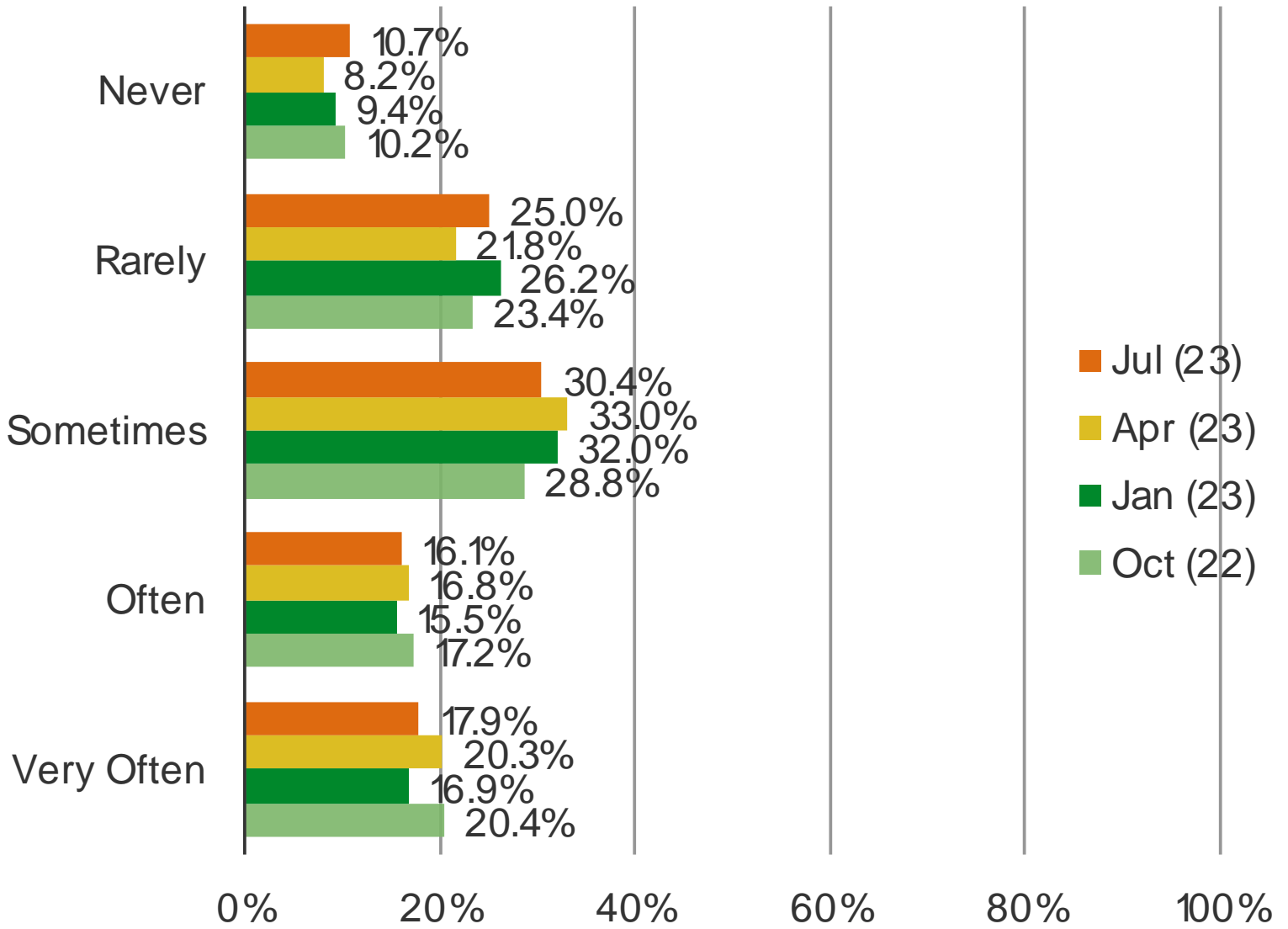- Apr (23)
- Jan (23)
- Oct (22)

X-axis: 0%, 20%, 40%, 60%, 80%, 100%

HOW LIKELY IS IT THAT YOU WOULD RECOMMEND INSTACART TO A FRIEND OR COLLEAGUE?
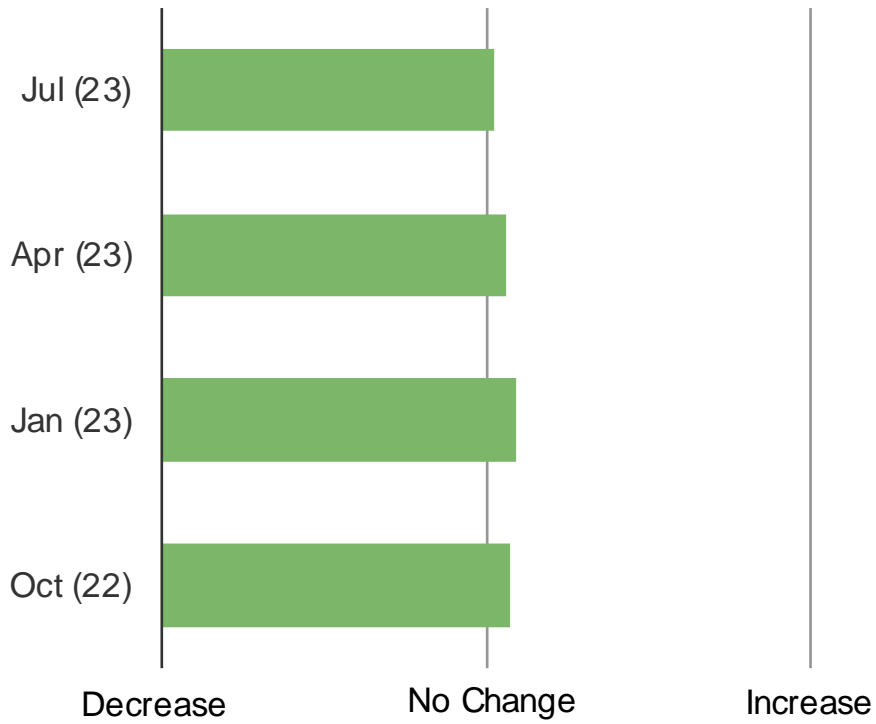
Posed to all respondents who have ever used Instacart.

Jul (23): 17.86
Apr (23): 28.23
Jan (23): 25.09
Oct (22): 21.4

WHAT DO YOU LIKE MOST/LEAST ABOUT INSTACART?

Posed to all respondents who have ever used Instacart.

MOST

LEAST
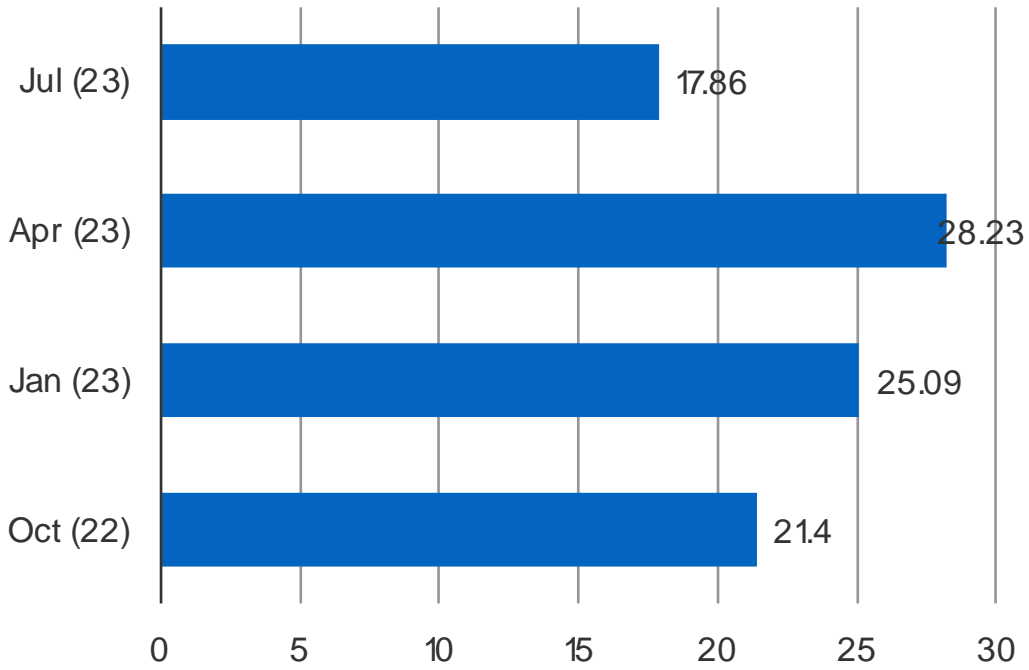
HOW OFTEN DO YOU USE INSTACART?

Posed to all respondents who have ever used Instacart.

Never
- 10.7%
- 8.2%
- 9.4%
- 10.2%

Rarely
- 25.0%
- 21.8%
- 26.2%
- 23.4%

Sometimes
- 30.4%
- 33.0%
- 32.0%
- 28.8%

Often
- 16.1%
- 16.8%
- 15.5%
- 17.2%

Very Often
- 17.9%
- 20.3%
- 16.9%
- 20.4%

Legend:
- Jul (23)
- Apr (23)
- Jan (23)
- Oct (22)

DO YOU EXPECT TO INCREASE OR DECREASE YOUR USAGE OF INSTACART GOING FORWARD?

Posed to all respondents who have ever used Instacart (N = 448)

July 2023 Data