
Food Delivery Apps | Monthly Tracking

September 2023

BACKGROUND:

- ❑ Survey of 1,500+ US Consumers balanced to census who read or subscribe to various publications.

FINDINGS:

1. DoorDash has been a significant share winner in our tracker survey.
2. While DoorDash has done well with frequent food delivery users, they have also shown significant share gains when it comes to more occasional users.
3. DoorDash users are the least likely among food delivery app users to also use other food delivery apps. They are the only food delivery platform in our survey to show declines in the average number of other apps used.
4. Overall food delivery usage among consumers in our survey has been shifting to more occasional usage (during the pandemic, usage was more frequent).
5. Turning to grocery delivery, usage increased considerably during the pandemic and then has regressed in the months that followed (starting in early 2022).
6. Instacart usage increased during the pandemic, but it didn't regress subsequently to pre-covid levels. Instead, it has held closer to flat from the peak through present.

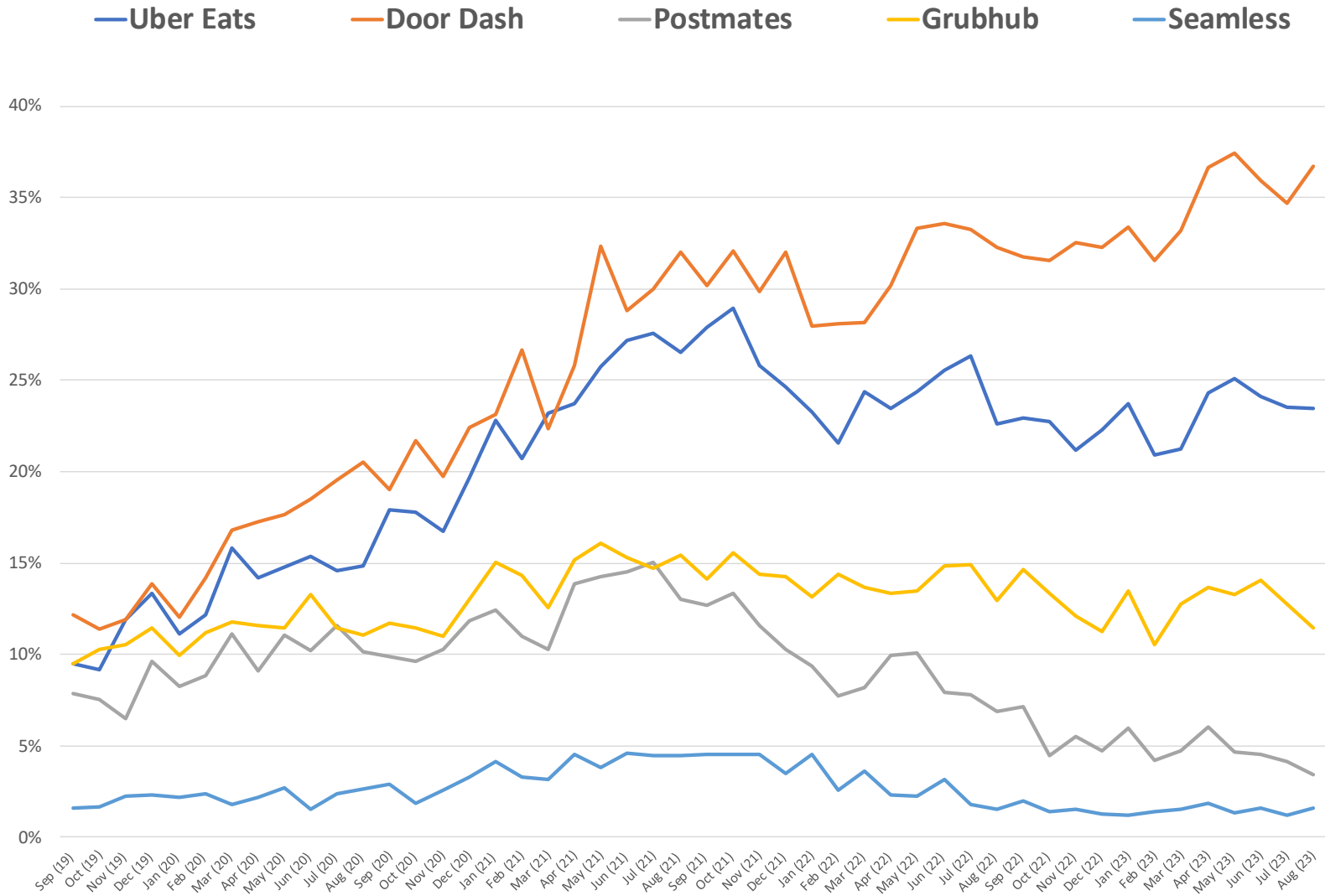


Food Delivery Apps

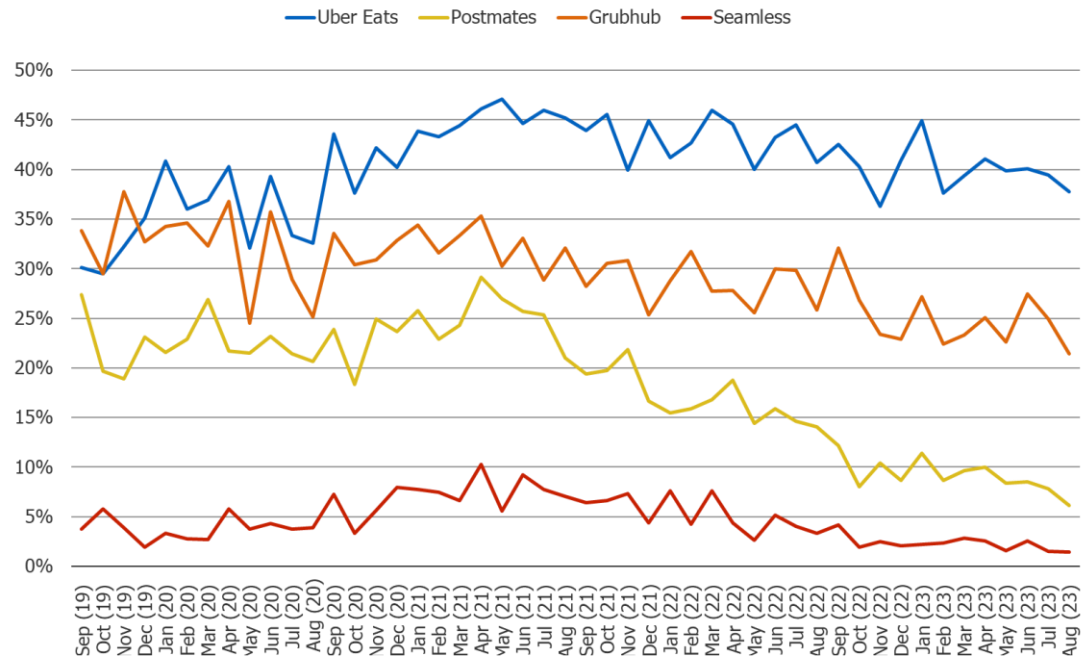


Do you regularly or occasionally use the following food delivery sites/apps?

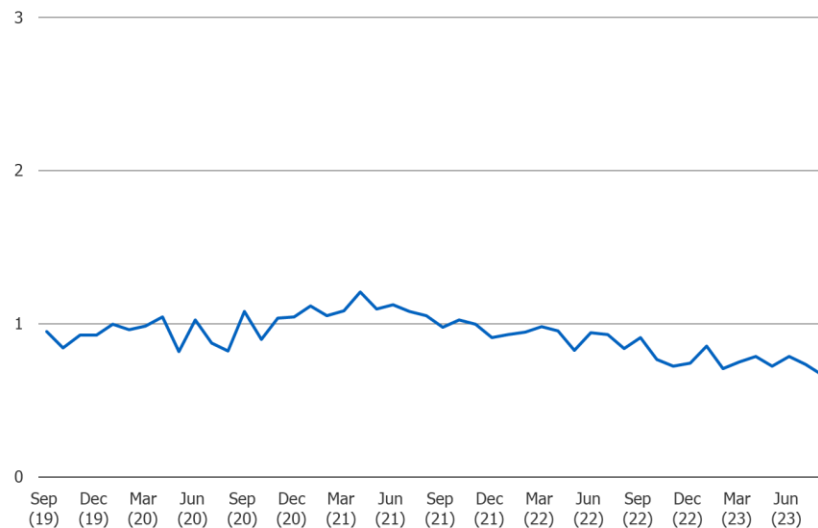
Posed to all respondents



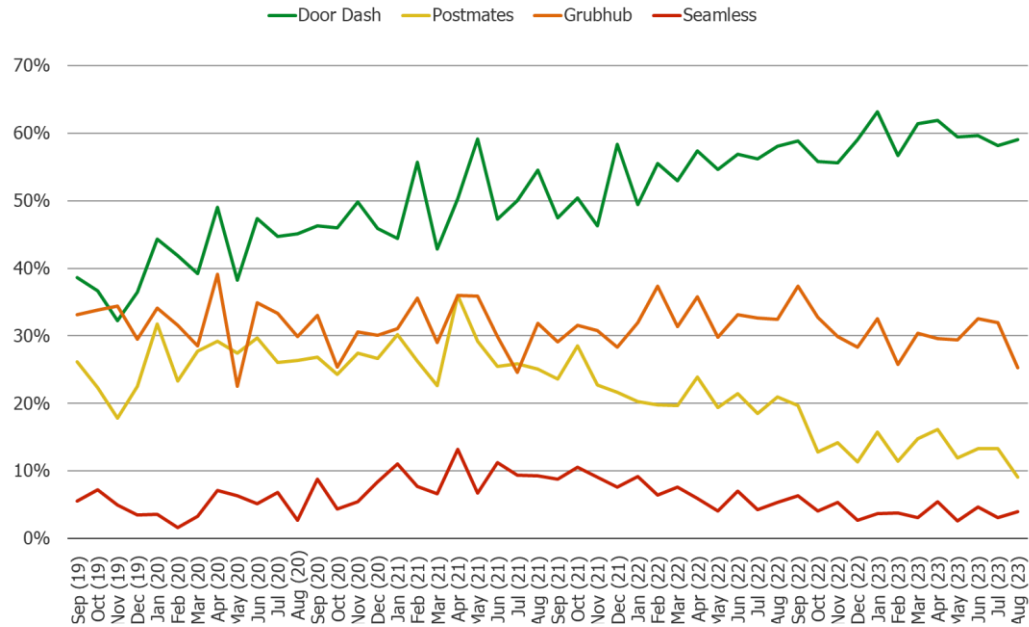
DOORDASH USERS | Do you regularly or occasionally use the following food delivery sites/apps?



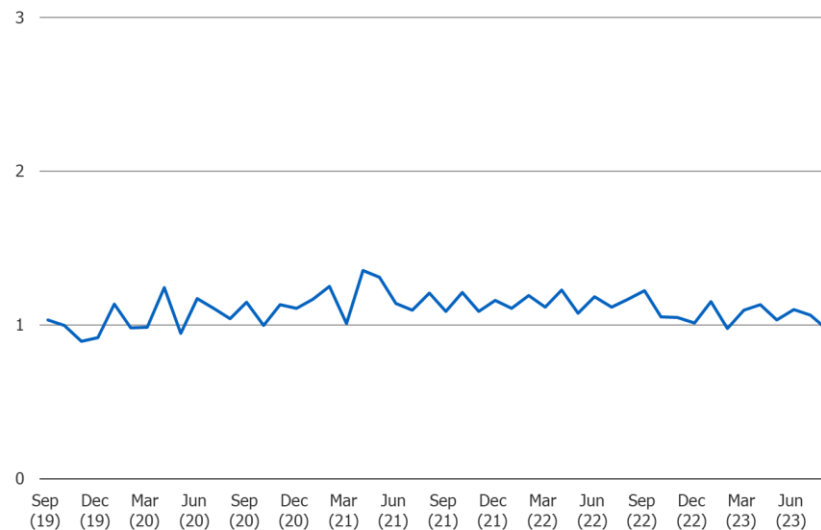
Average Number of Options Selected in ADDITION to DoorDash...



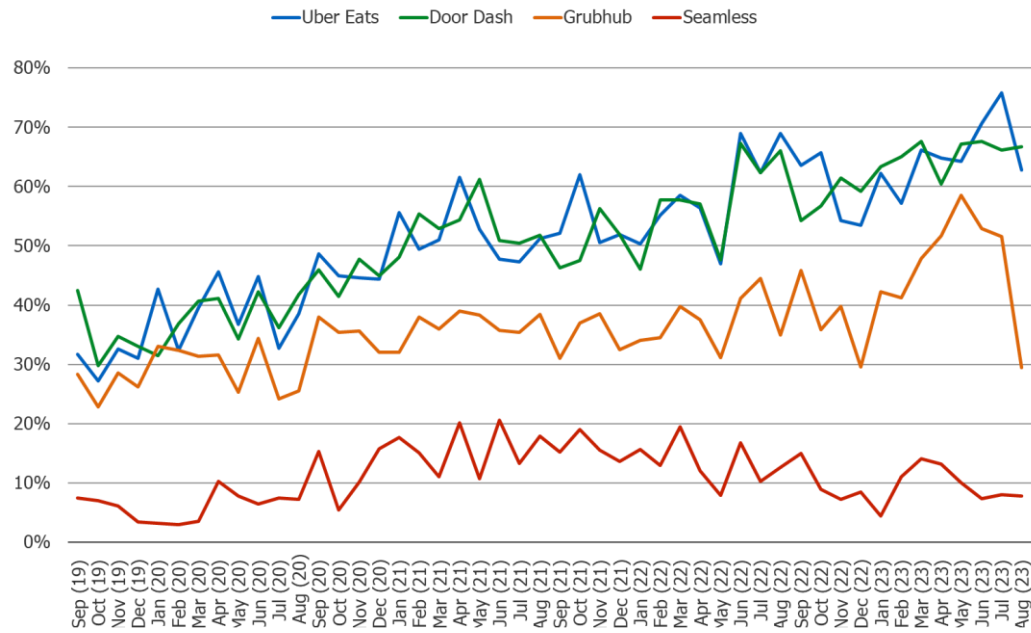
UBER EATS USERS | Do you regularly or occasionally use the following food delivery sites/apps?



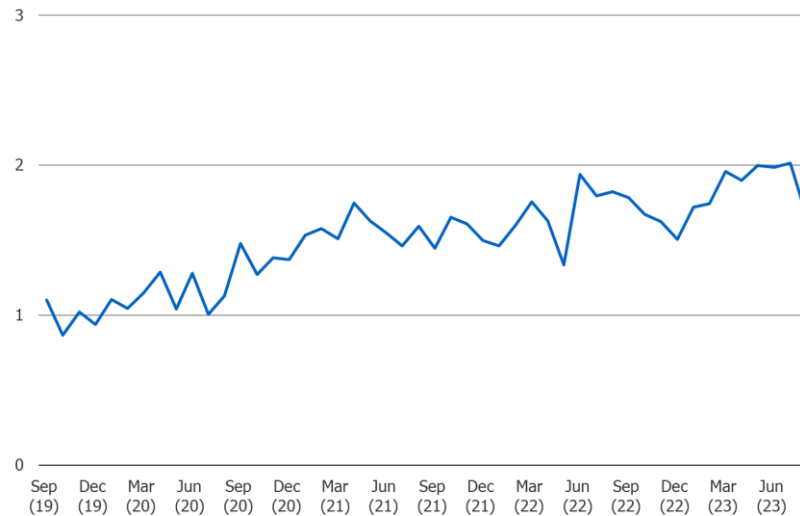
Average Number of Options Selected in ADDITION to Uber Eats...



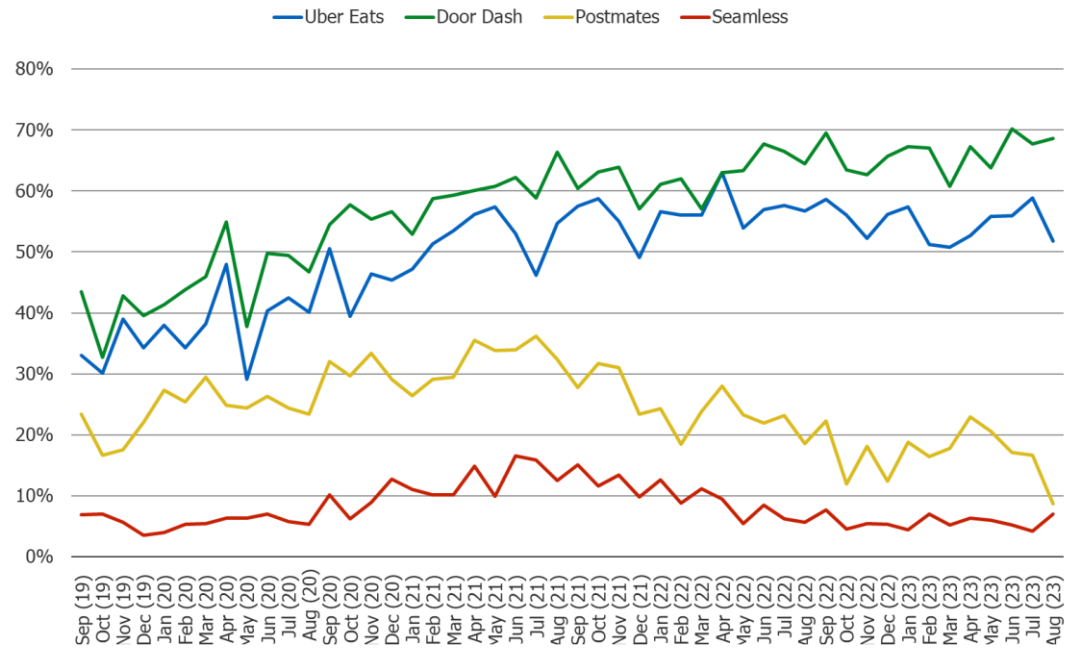
POSTMATES USERS | Do you regularly or occasionally use the following food delivery sites/apps?



Average Number of Options Selected in ADDITION to Postmates...



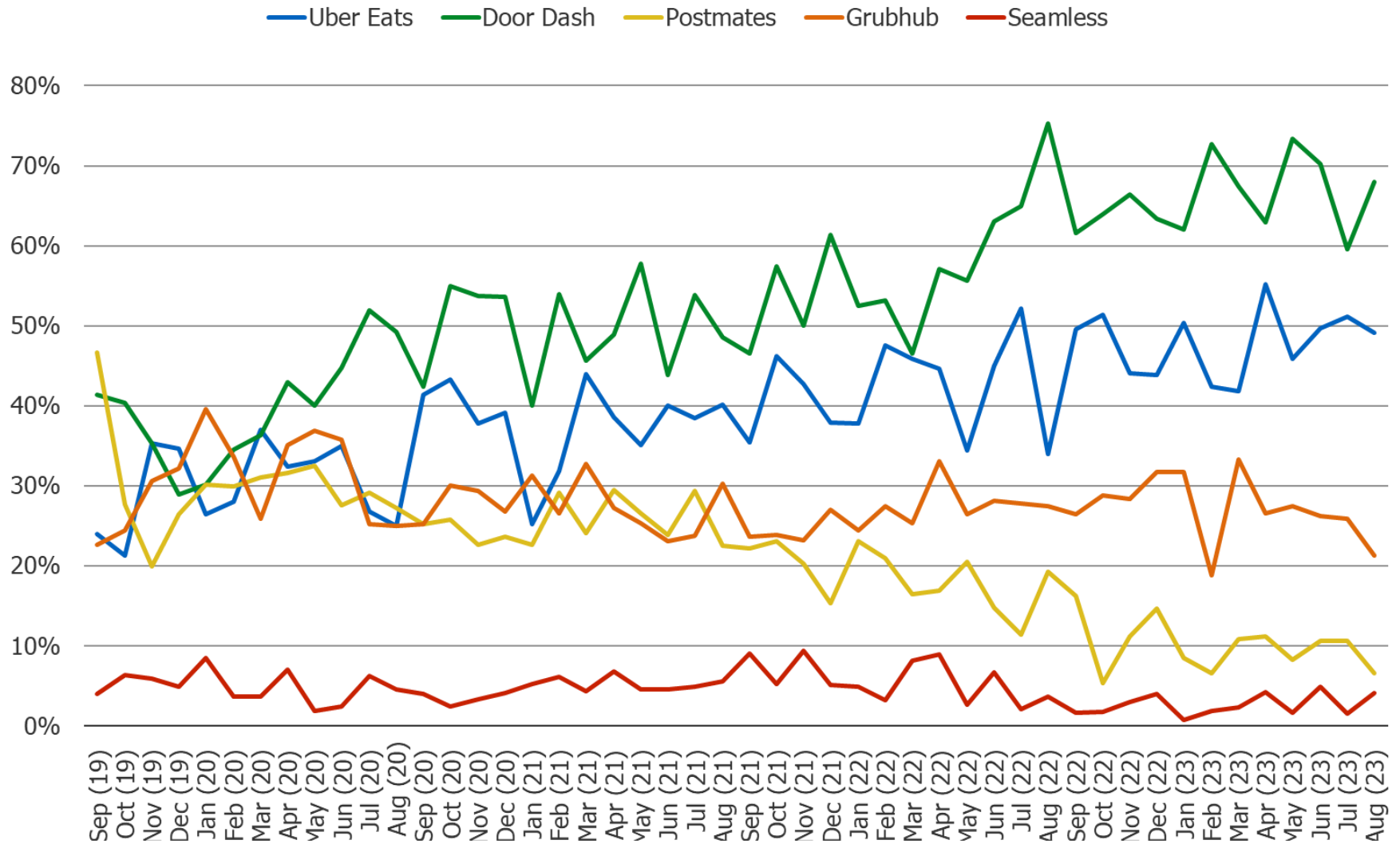
GRUBHUB USERS | Do you regularly or occasionally use the following food delivery sites/apps?



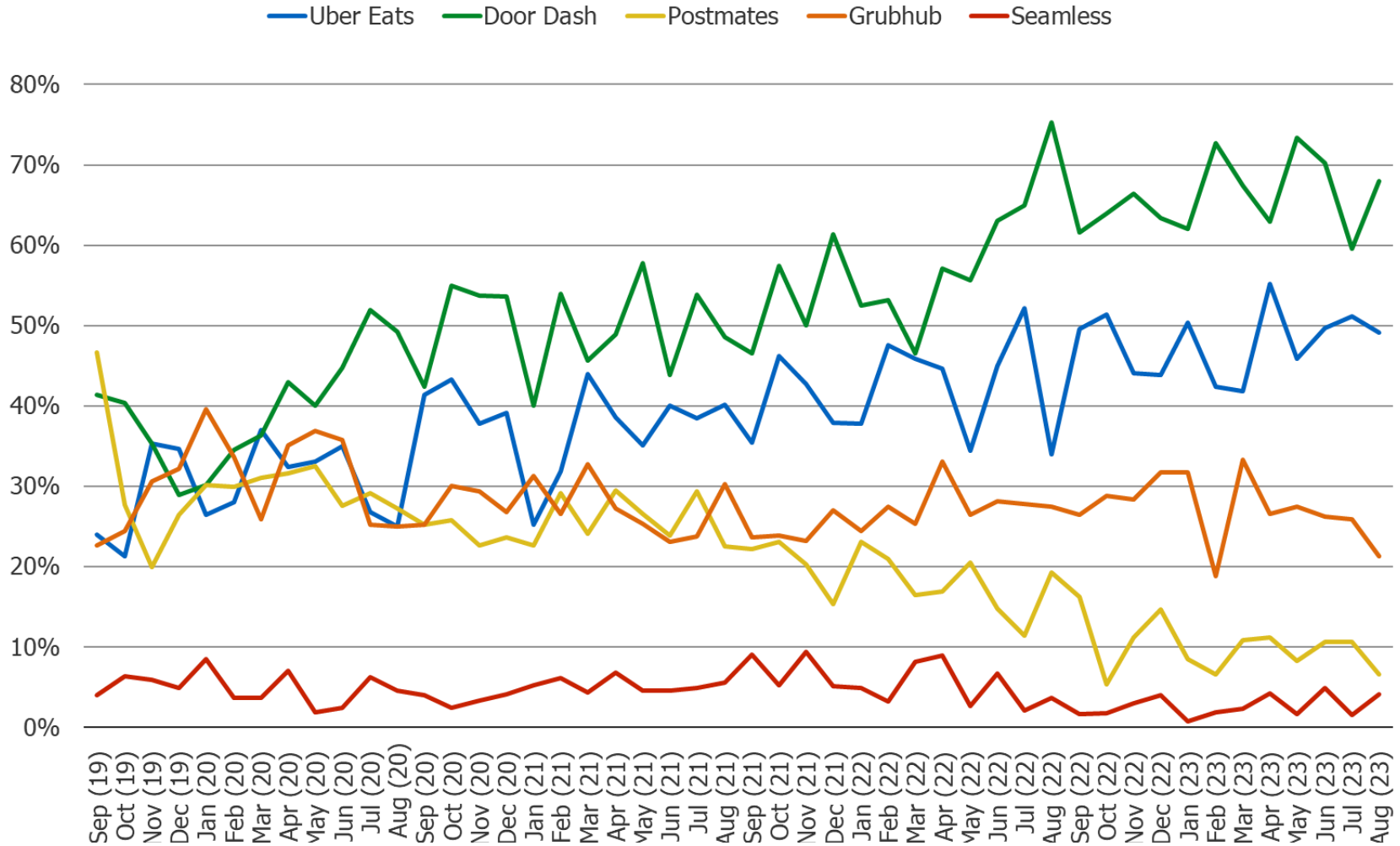
Average Number of Options Selected in ADDITION to Grubhub...



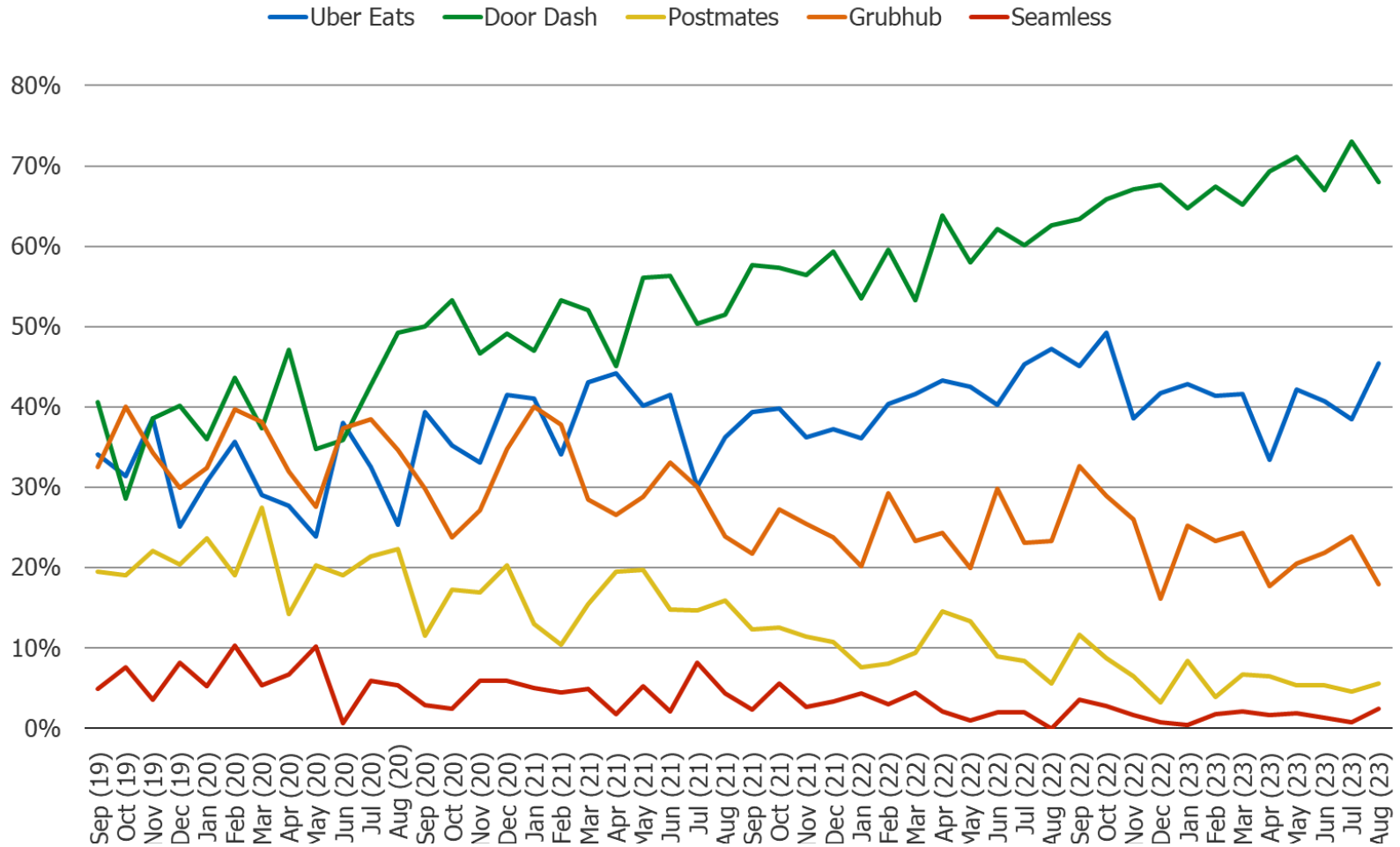
Respondents who order food delivery multiple times per week | Do you regularly or occasionally use the following food delivery sites/apps?



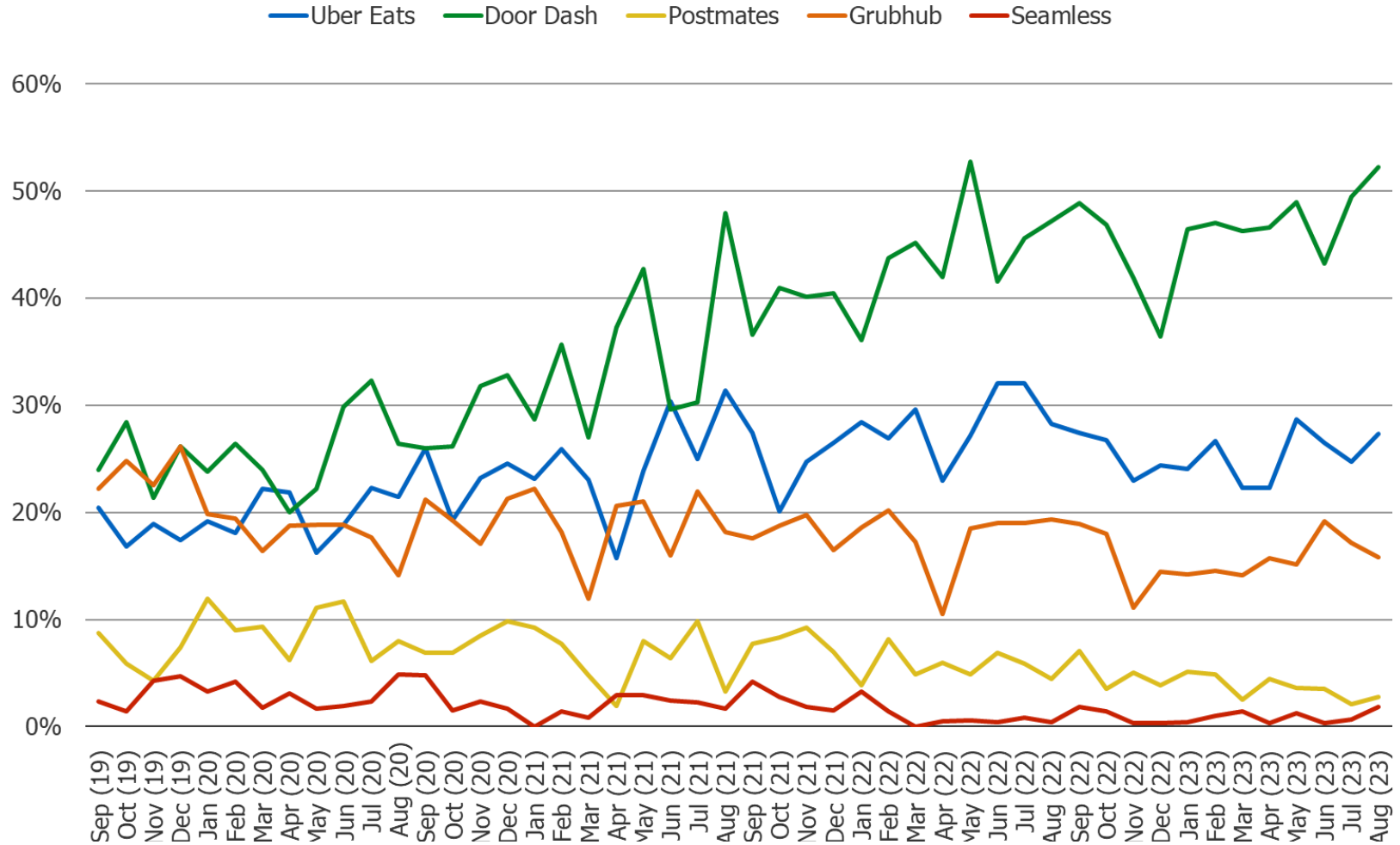
Respondents who order food delivery once per week | Do you regularly or occasionally use the following food delivery sites/apps?



Respondents who order food delivery once per or twice per month | Do you regularly or occasionally use the following food delivery sites/apps?



Respondents who order food delivery less than once per month | Do you regularly or occasionally use the following food delivery sites/apps?

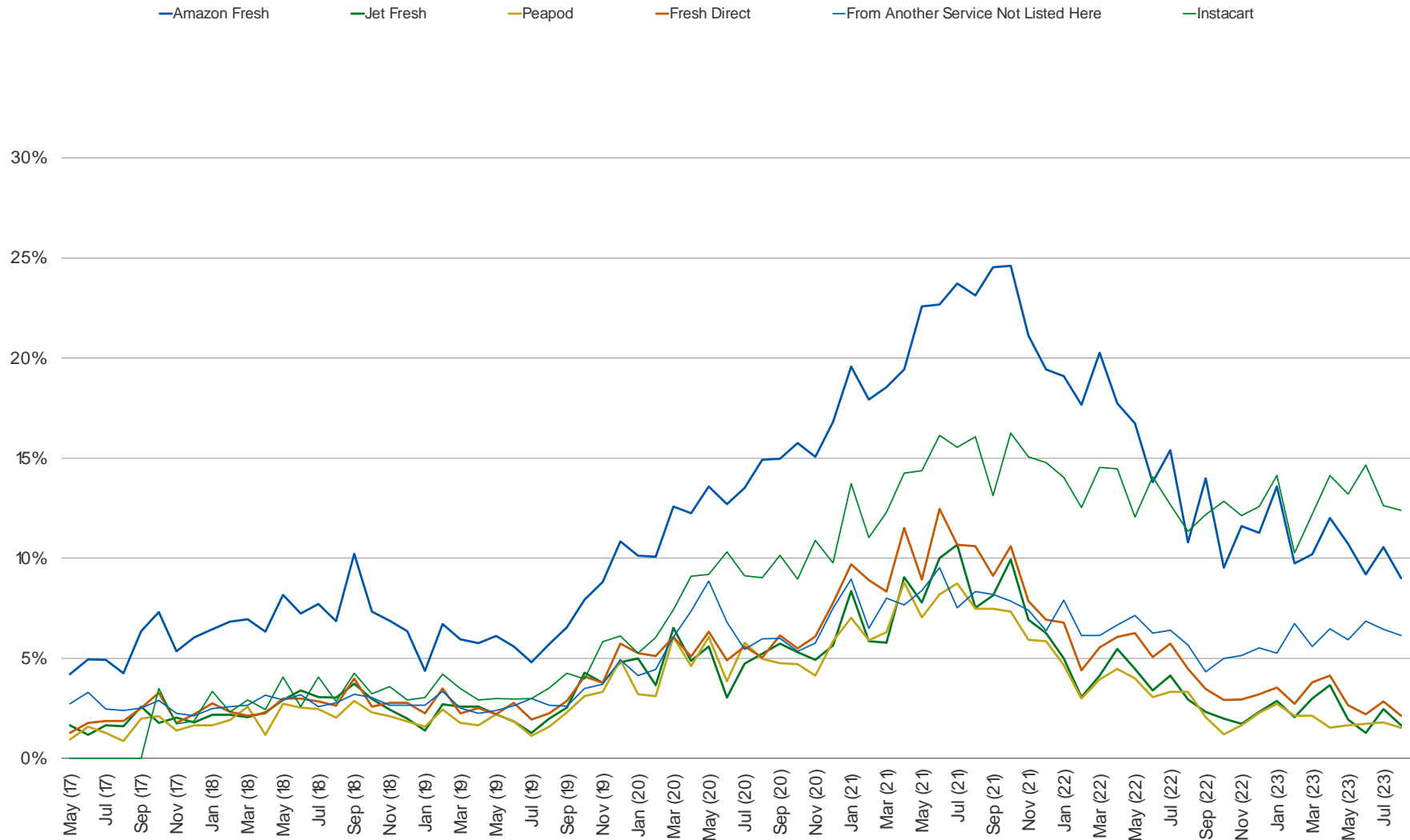


Grocery Delivery



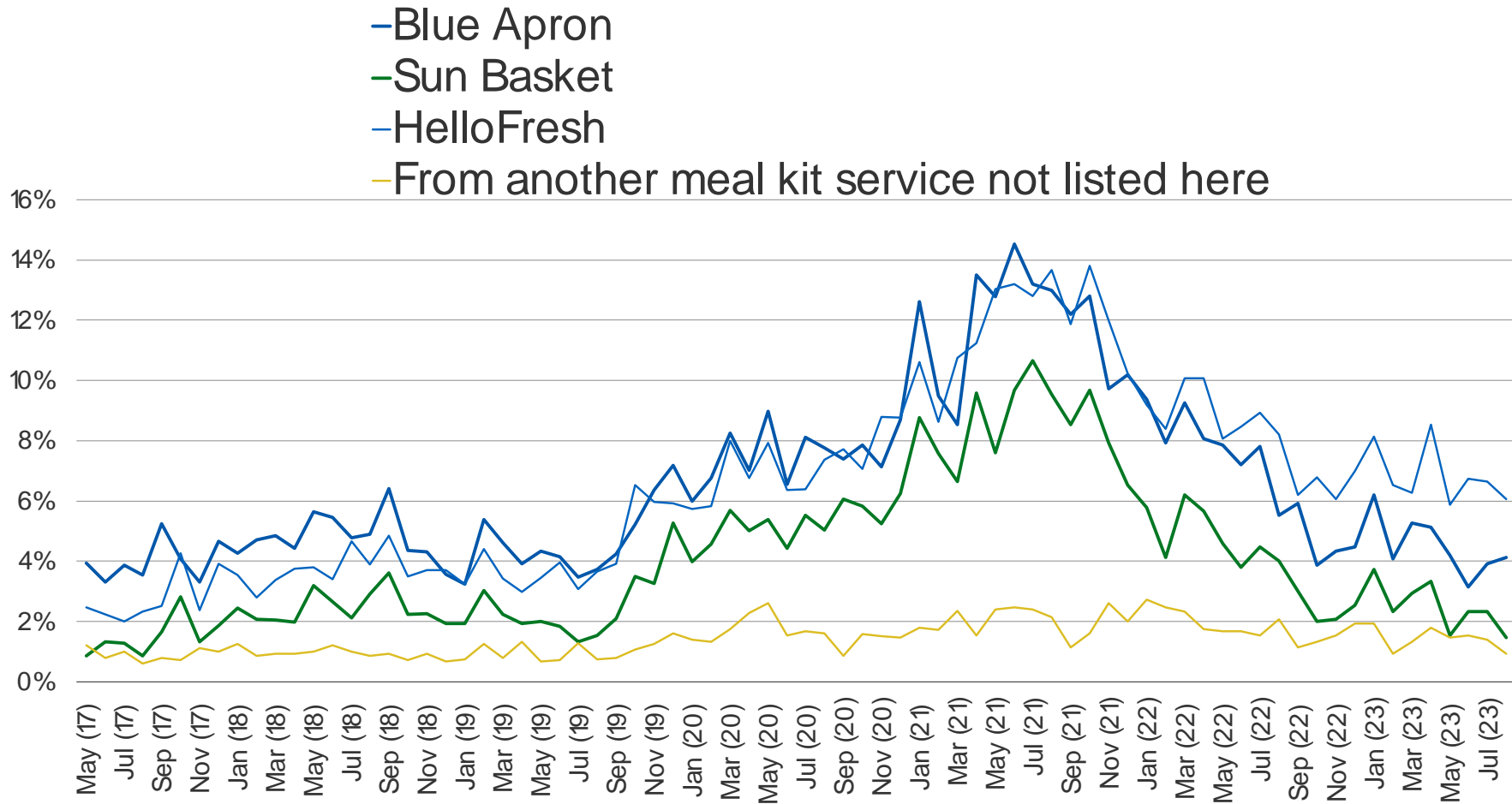
Have you gotten groceries delivered in the past month from any of the following?

Posed to all respondents.



Have you gotten meal kits delivered from any of the following in the past month?

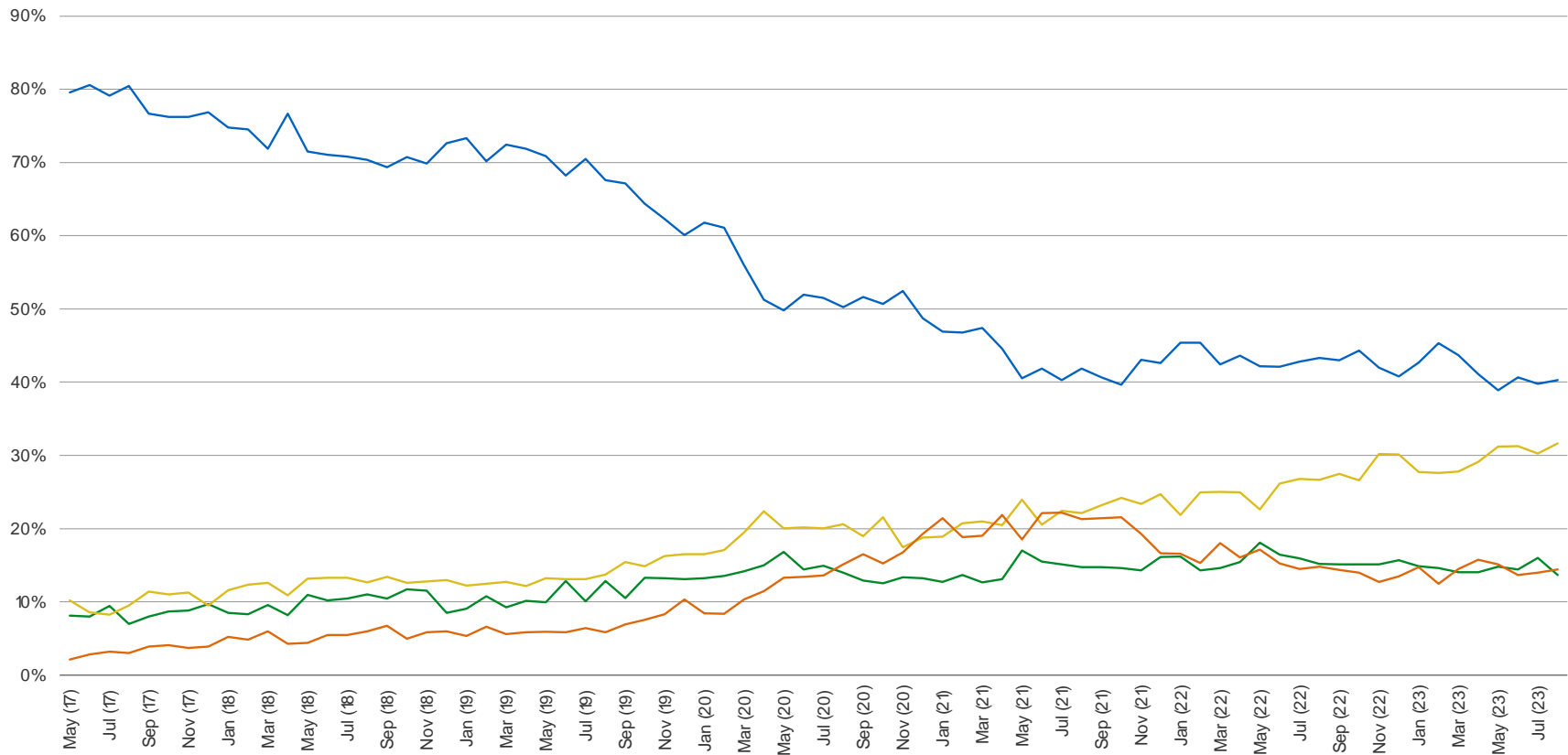
Posed to all respondents.



Please characterize your experience with ordering groceries online:

Posed to all respondents.

- I have never ordered groceries online
- I order groceries online occasionally
- I ordered groceries online once, but not again since
- I order groceries online regularly



Please characterize your experience with ordering meal kits online:

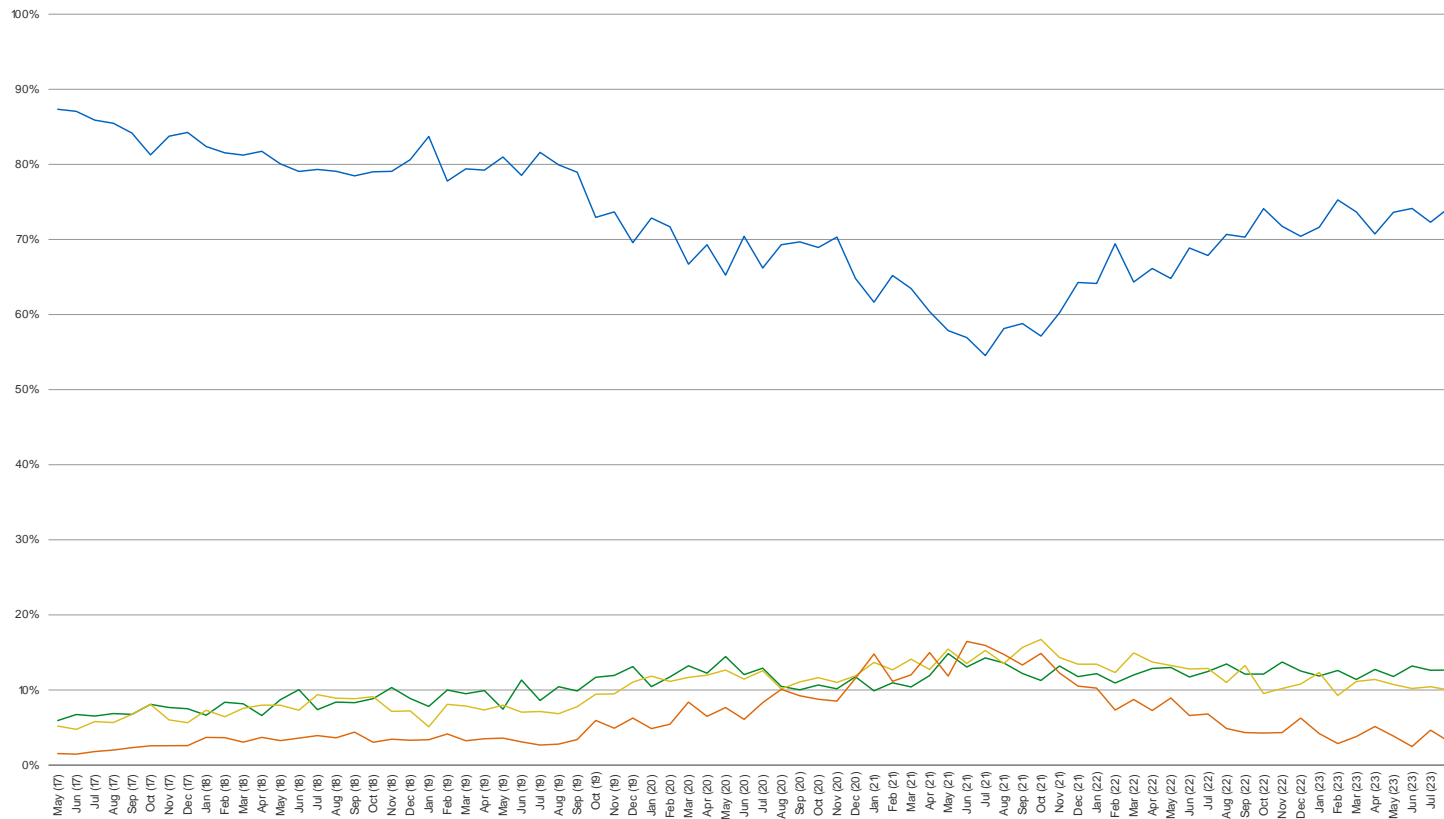
Posed to all respondents.

-I have never ordered meal kits

-I ordered meal kits once, but not again since

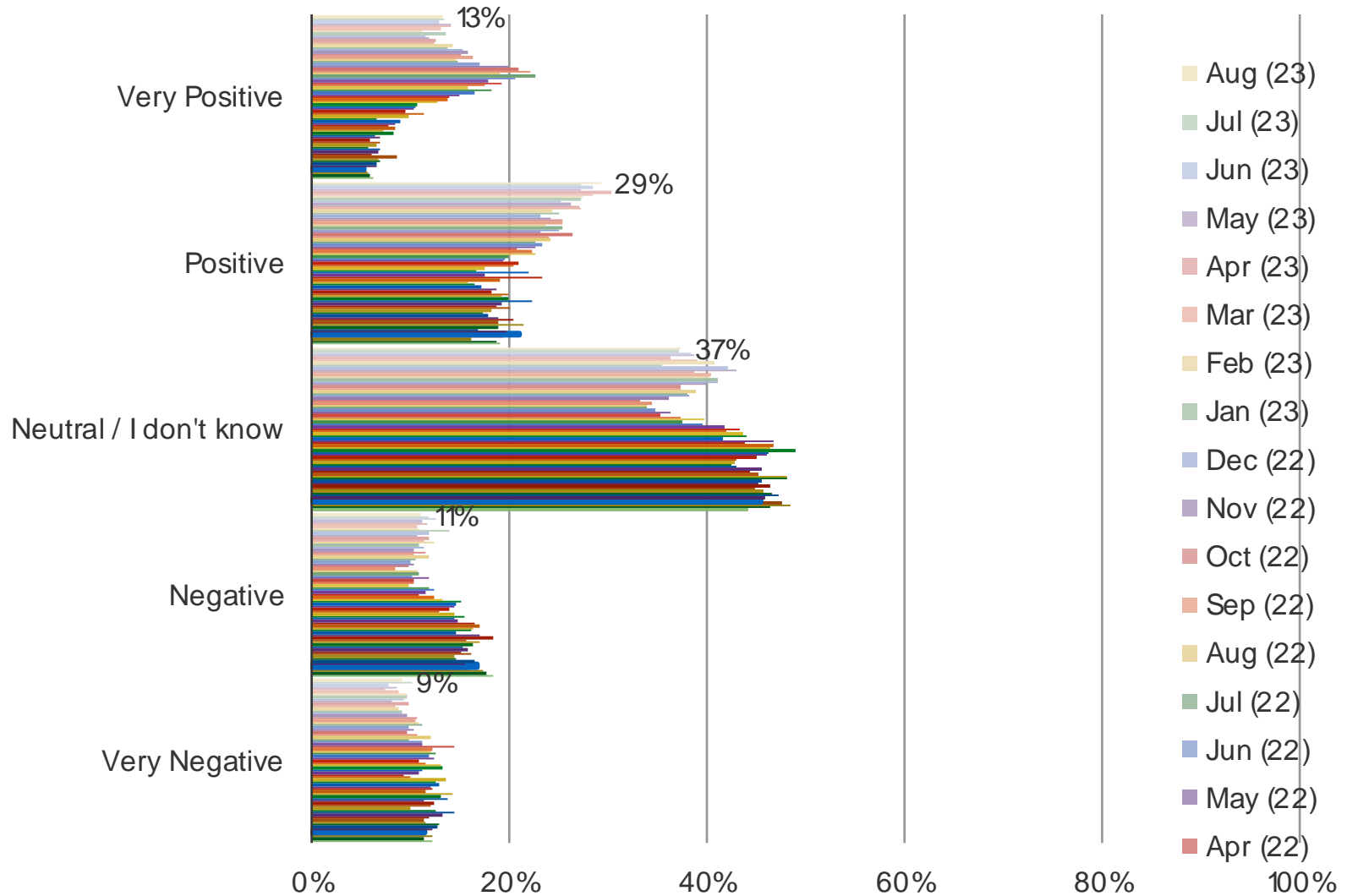
-I order meal kits online occasionally

-I order meal kits online regularly



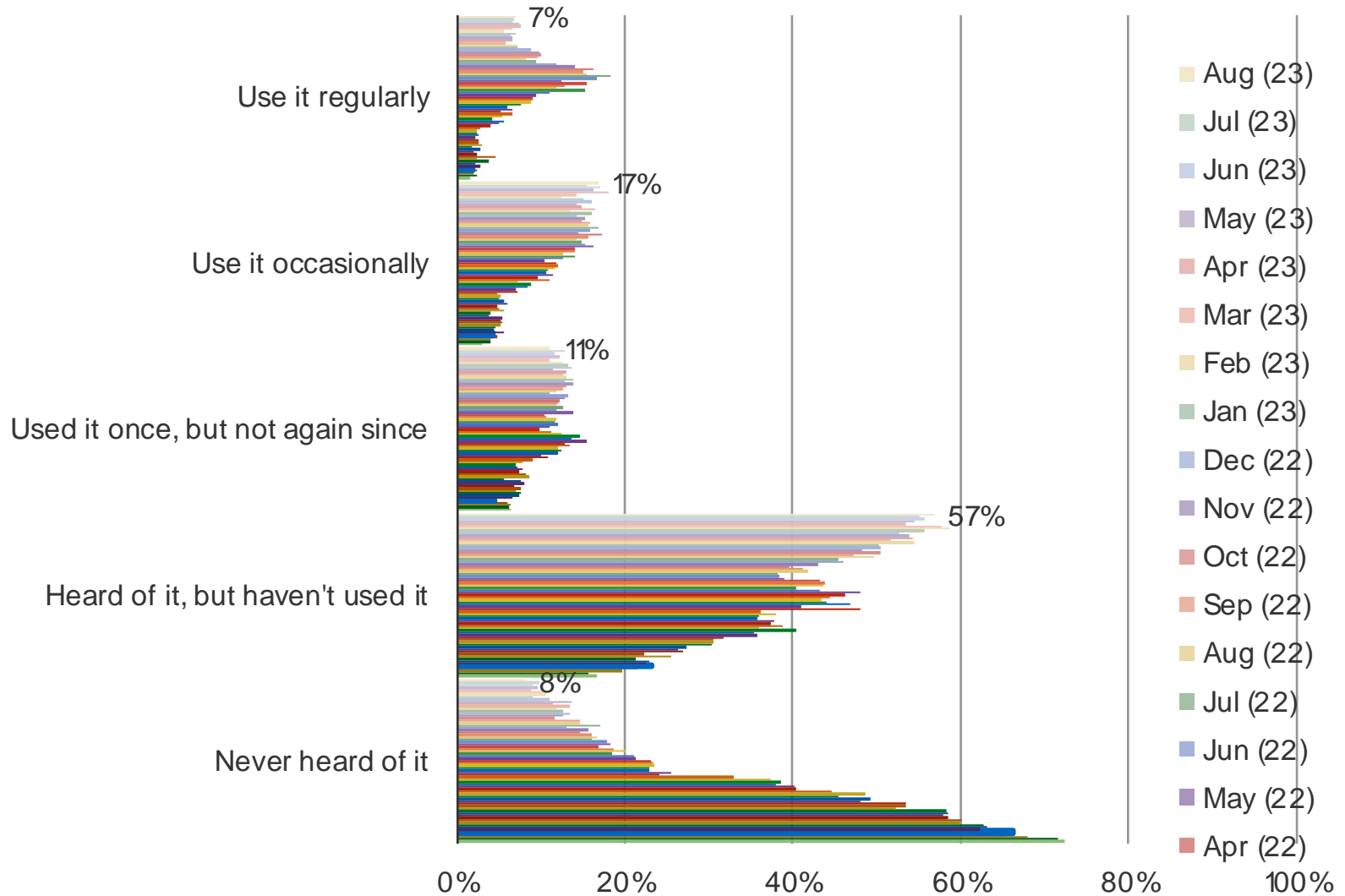
In general, how do you feel about the thought of ordering groceries online?

Posed to all respondents.



What is your familiarity with Instacart?

Posed to all respondents.



What is your familiarity with Shipt?

Posed to all respondents.

