

Bespoke Survey Research

October 2023

Food Delivery

Volume 29 | Quarterly Survey

1,500 US Consumers Balanced To Census

Tickers Covered: UBER, DASH, GRUB.

KPIs and Key questions

1. DoorDash has been making gains on Uber Eats when we ask users of both which platform they would opt to use if they could only use one.
2. Consumers continue to view food delivery platforms as a luxury vs. a necessity.
3. Our tracker has been shifting more in the direction of using food delivery apps less vs. using them more. During the pandemic years, the share of consumers using food delivery apps very frequently increased. Since then, consumers have shifted usage from very frequent, on average, to more occasional.
4. DoorDash continues to test well in our trackers and remains in the lead when it comes to platforms that consumers use regularly or occasionally.
5. Consumers continue to flag that fees are important to them when they decide which platform to use. Pricing has grown increasingly important as a catalyst.

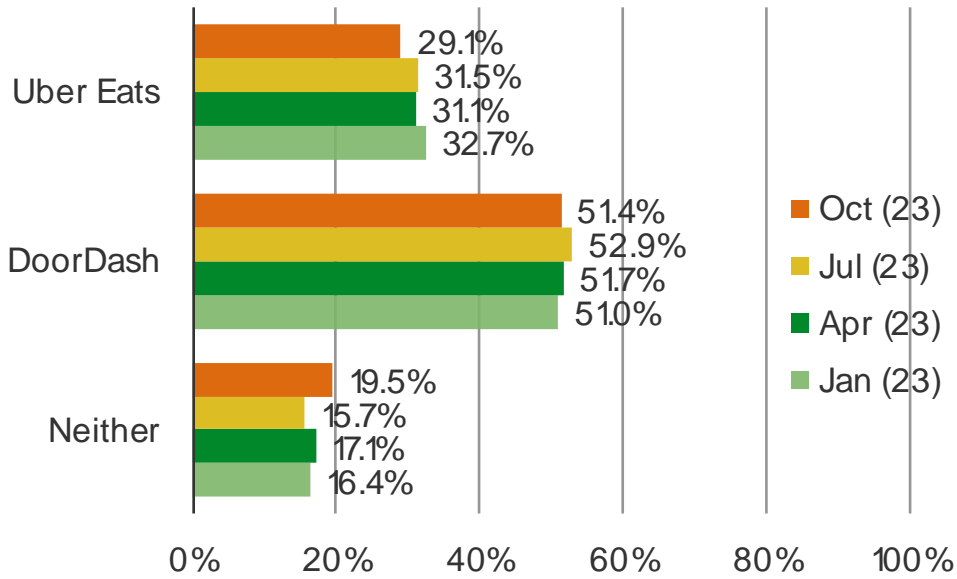
Noteworthy Stats:

- 22.6%** Of respondents order food through websites online or through apps either frequently or very frequently.
- 32.1%** Of respondents who use food delivery apps use Uber Eats regularly or occasionally.
- 61.6%** Of respondents who use both Uber Eats and DoorDash would choose DoorDash if they could only use one.

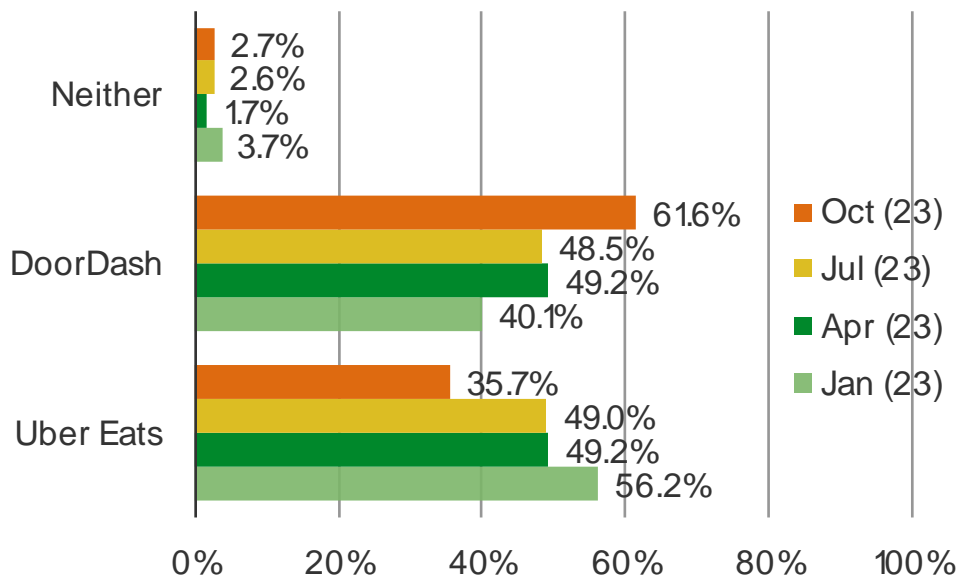
RECENTLY ADDED QUESTIONS

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

Posed to all food delivery users.



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



PREFERS DOORDASH OVER UBER EATS, WHY?

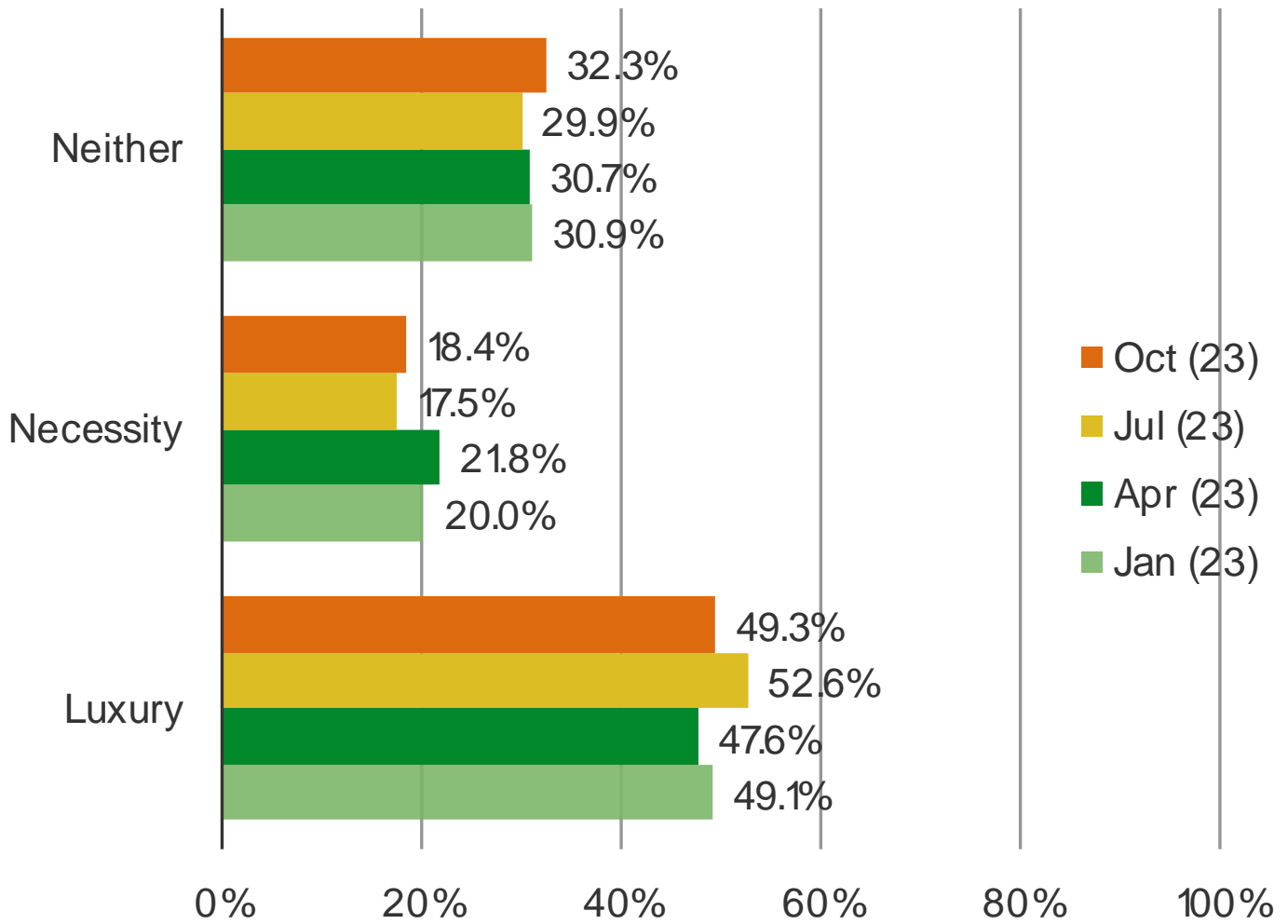
Posed to users of BOTH who prefer Uber Eats



Food Delivery

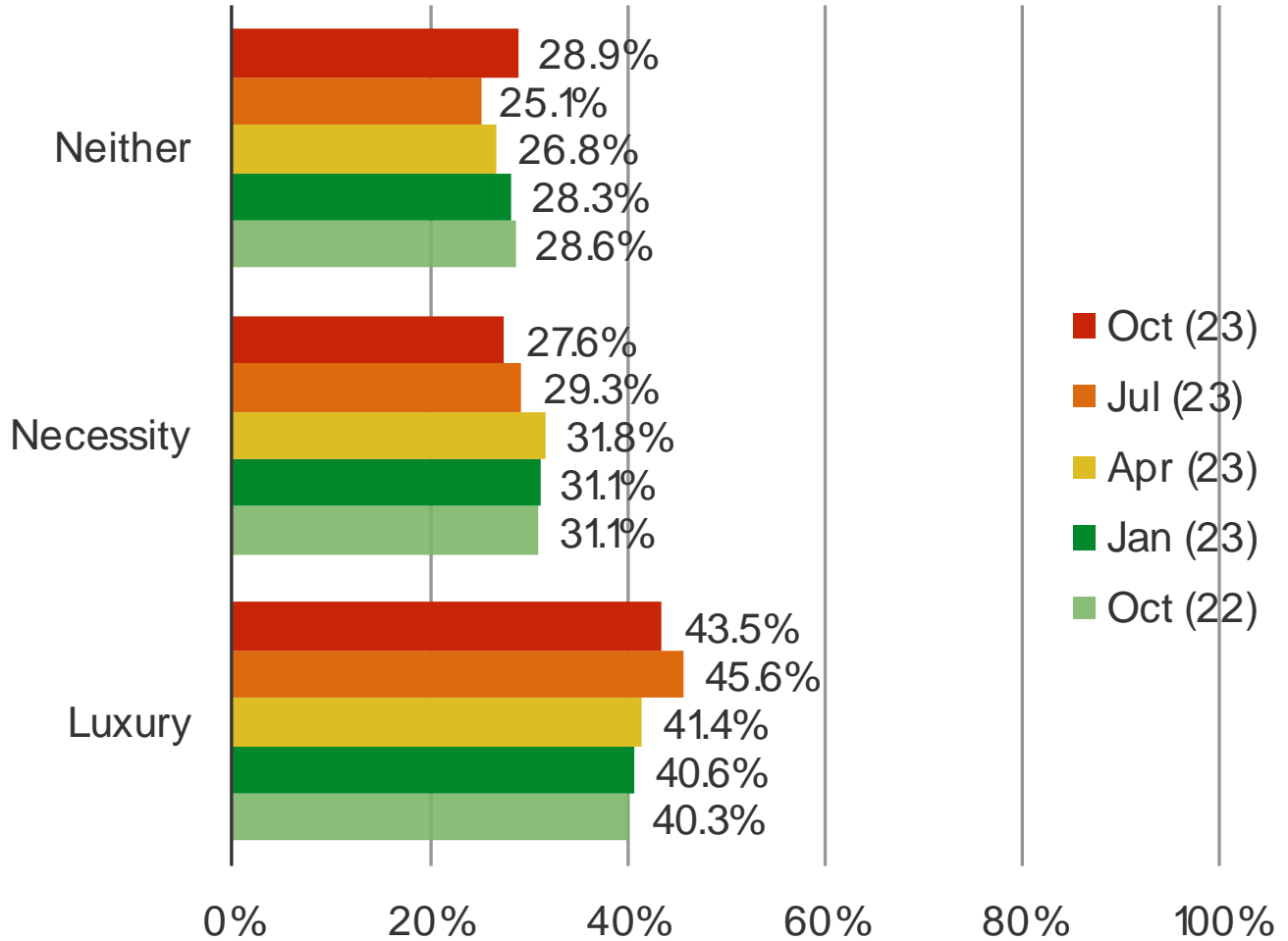
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.



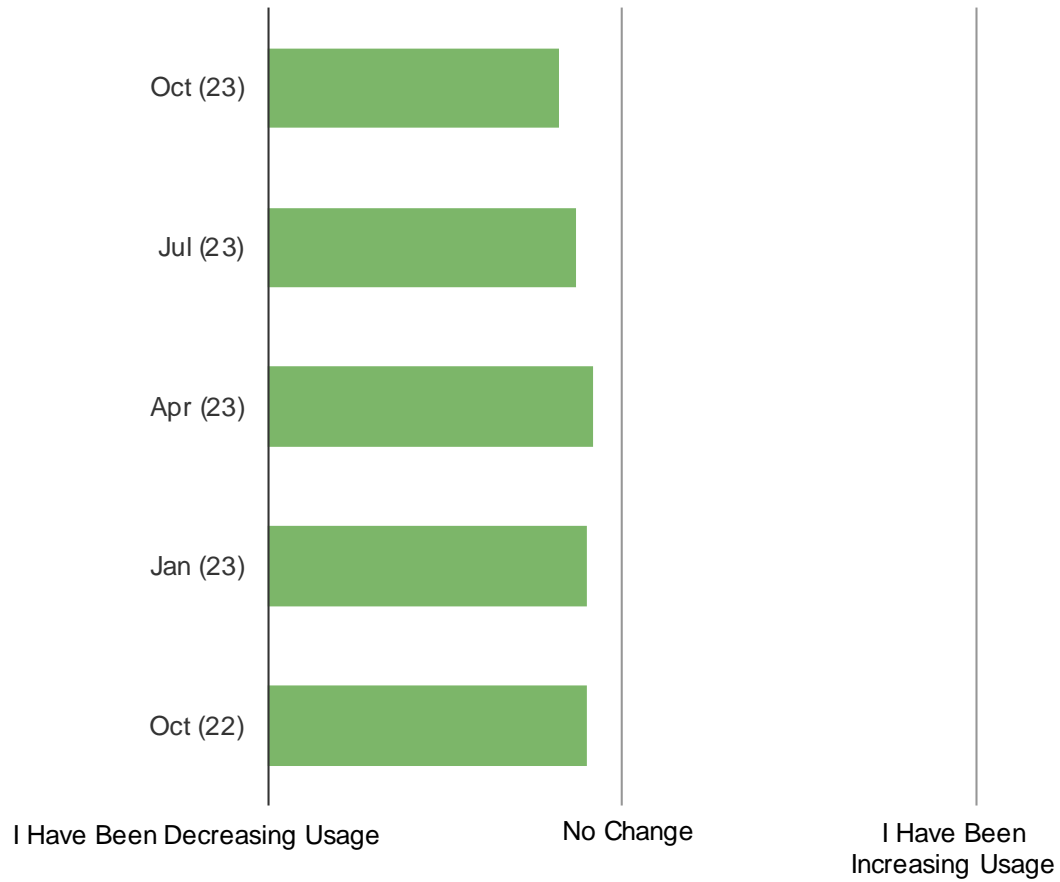
DO YOU VIEW GROCERY DELIVERY AS MORE OF A...

Posed to all respondents.



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

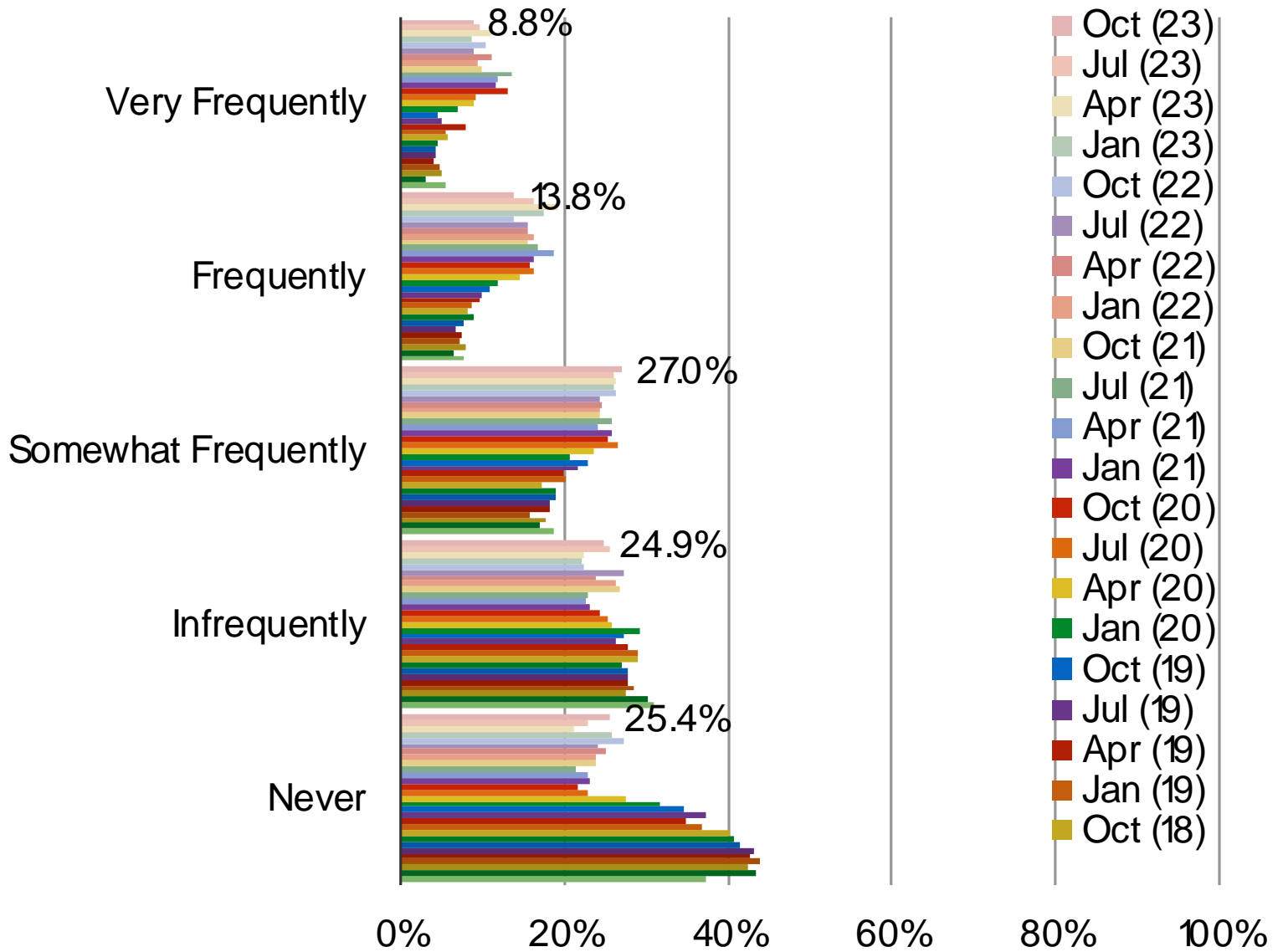
Posed to respondents who use food delivery apps.



USAGE TRENDS AND SENTIMENT READINGS

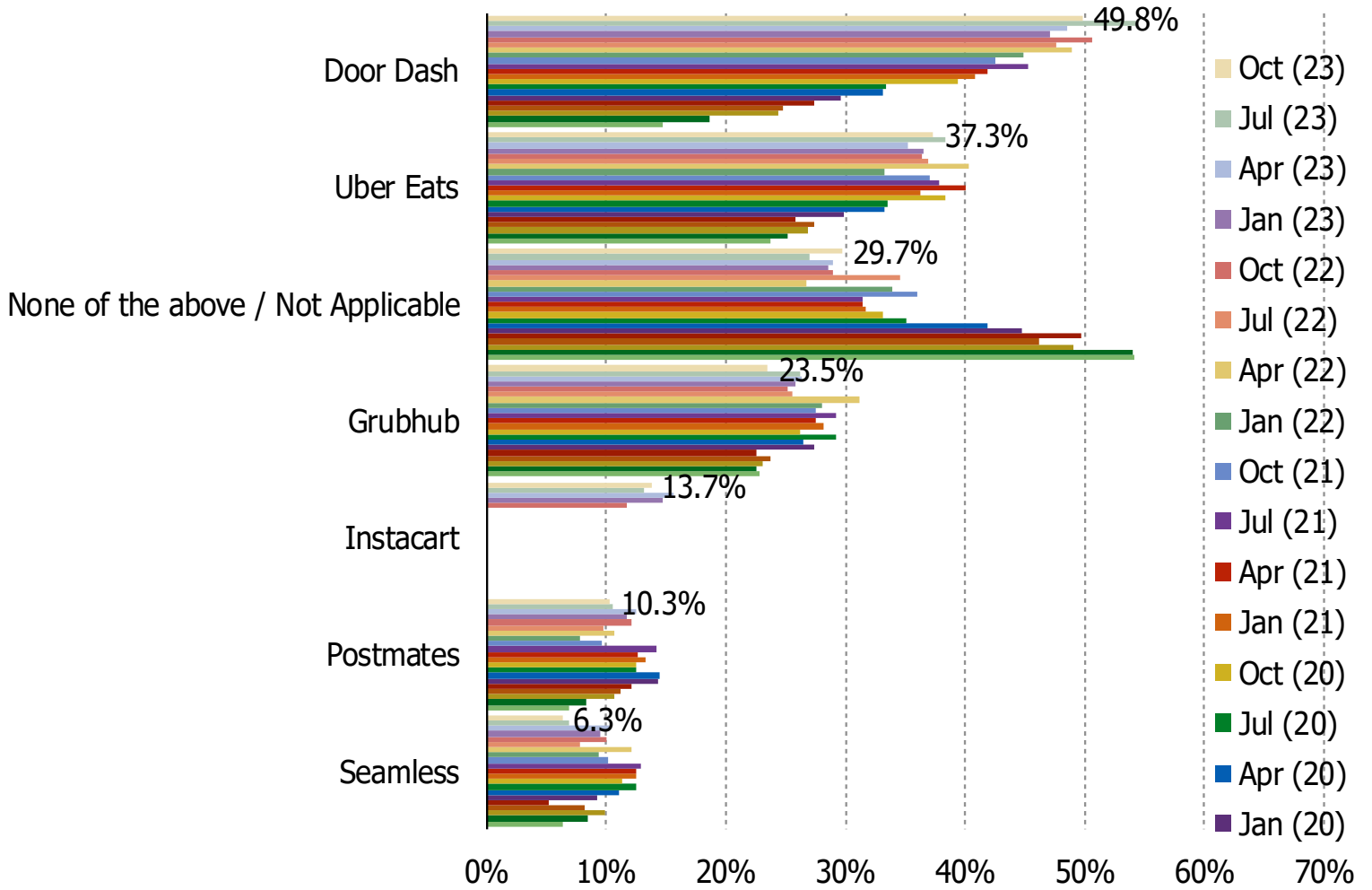
HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



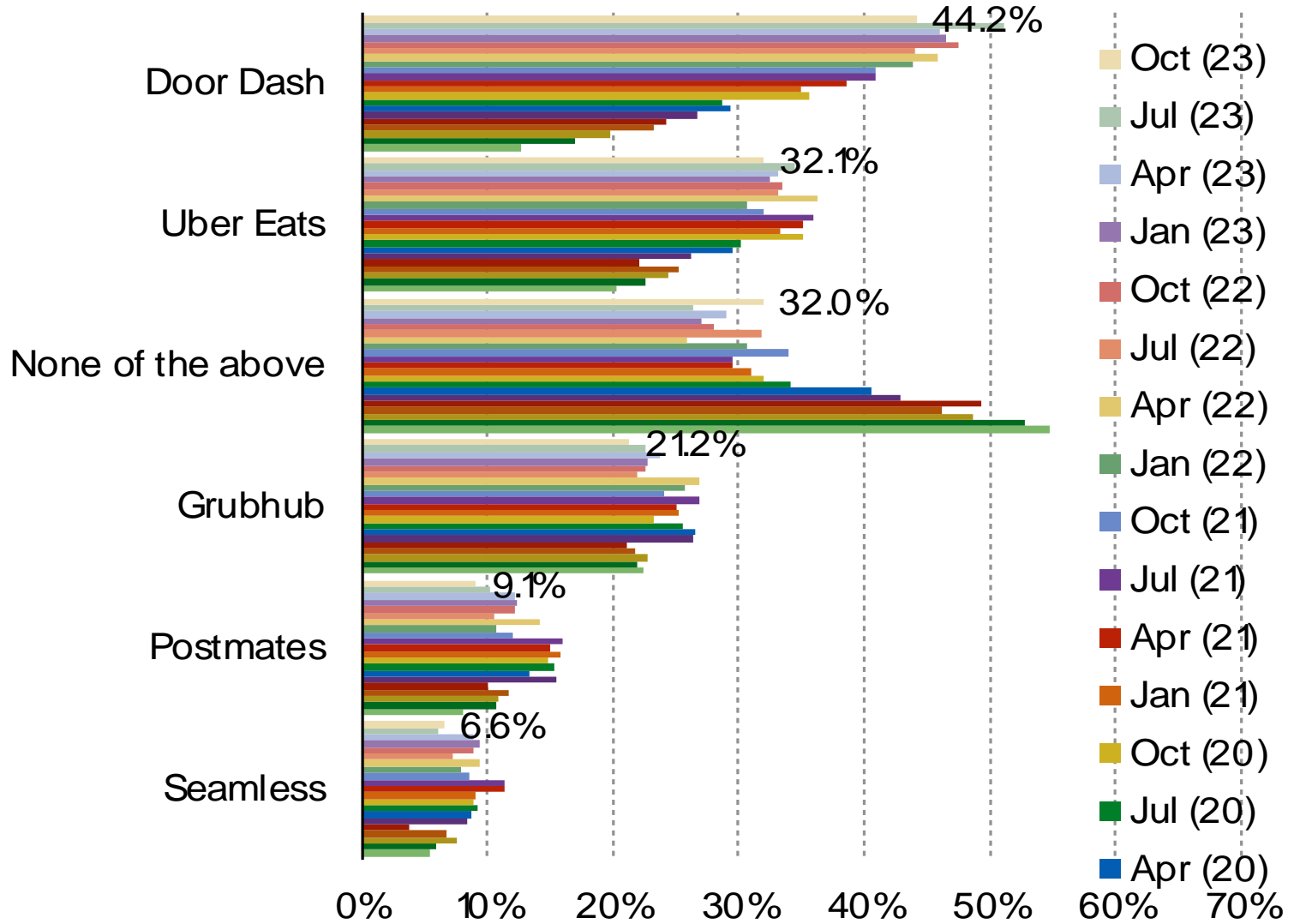
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.



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

Posed to respondents who use food delivery apps.

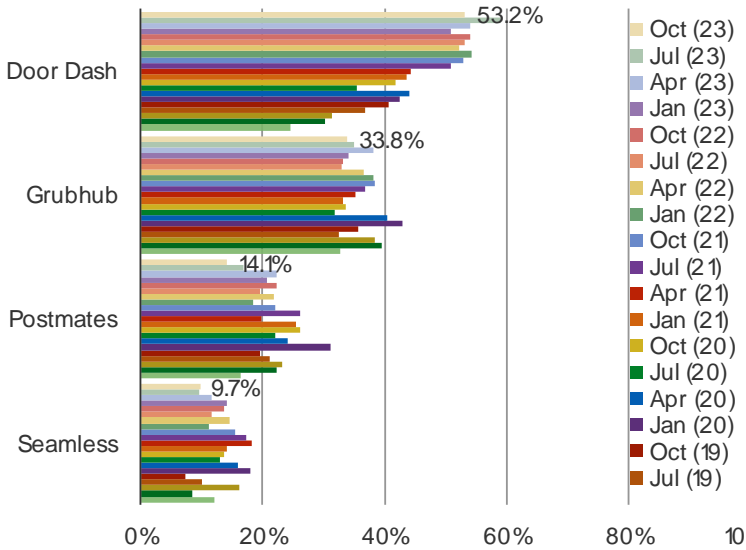


N = 932

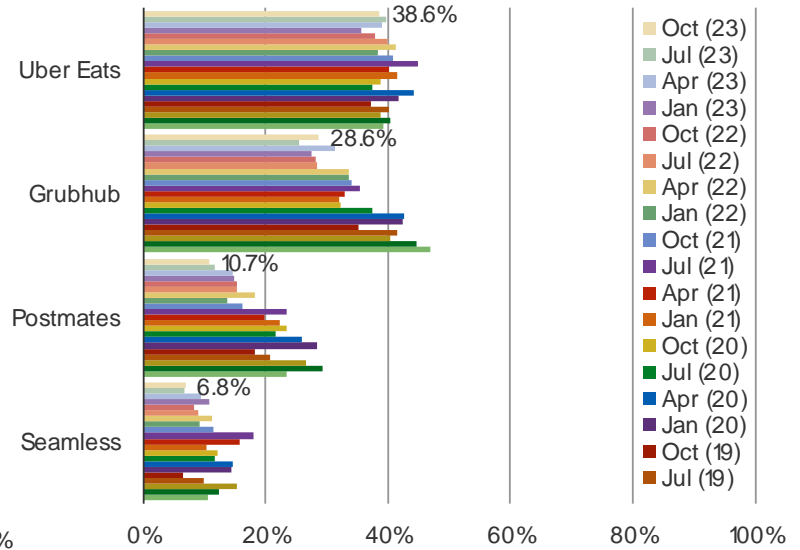
CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.

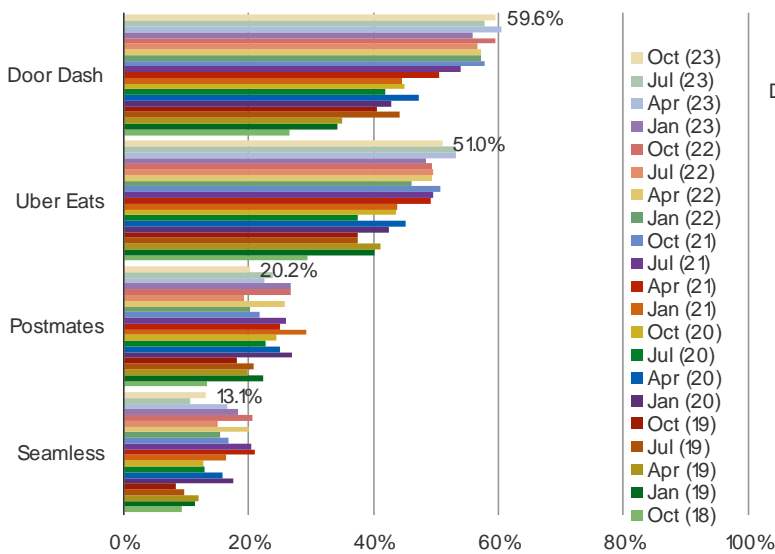
Uber Eats Users Also Use



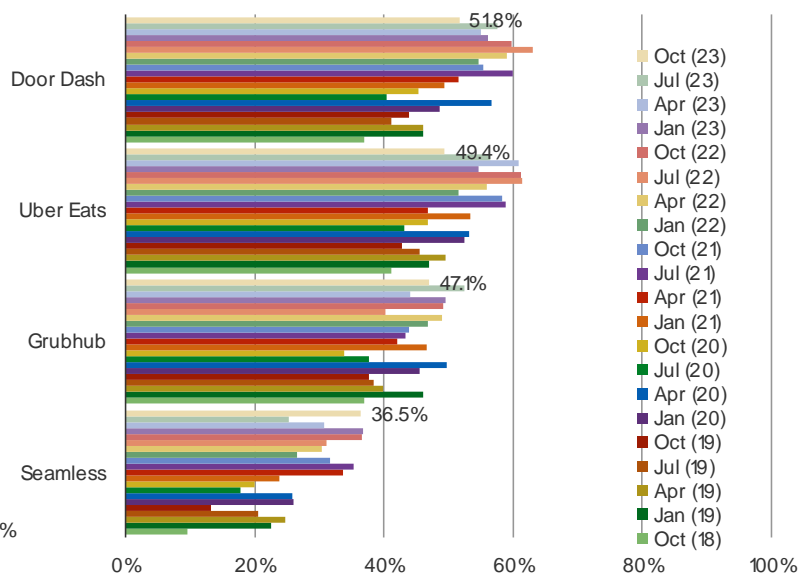
Door Dash Users Also Use



GrubHub Users Also Use



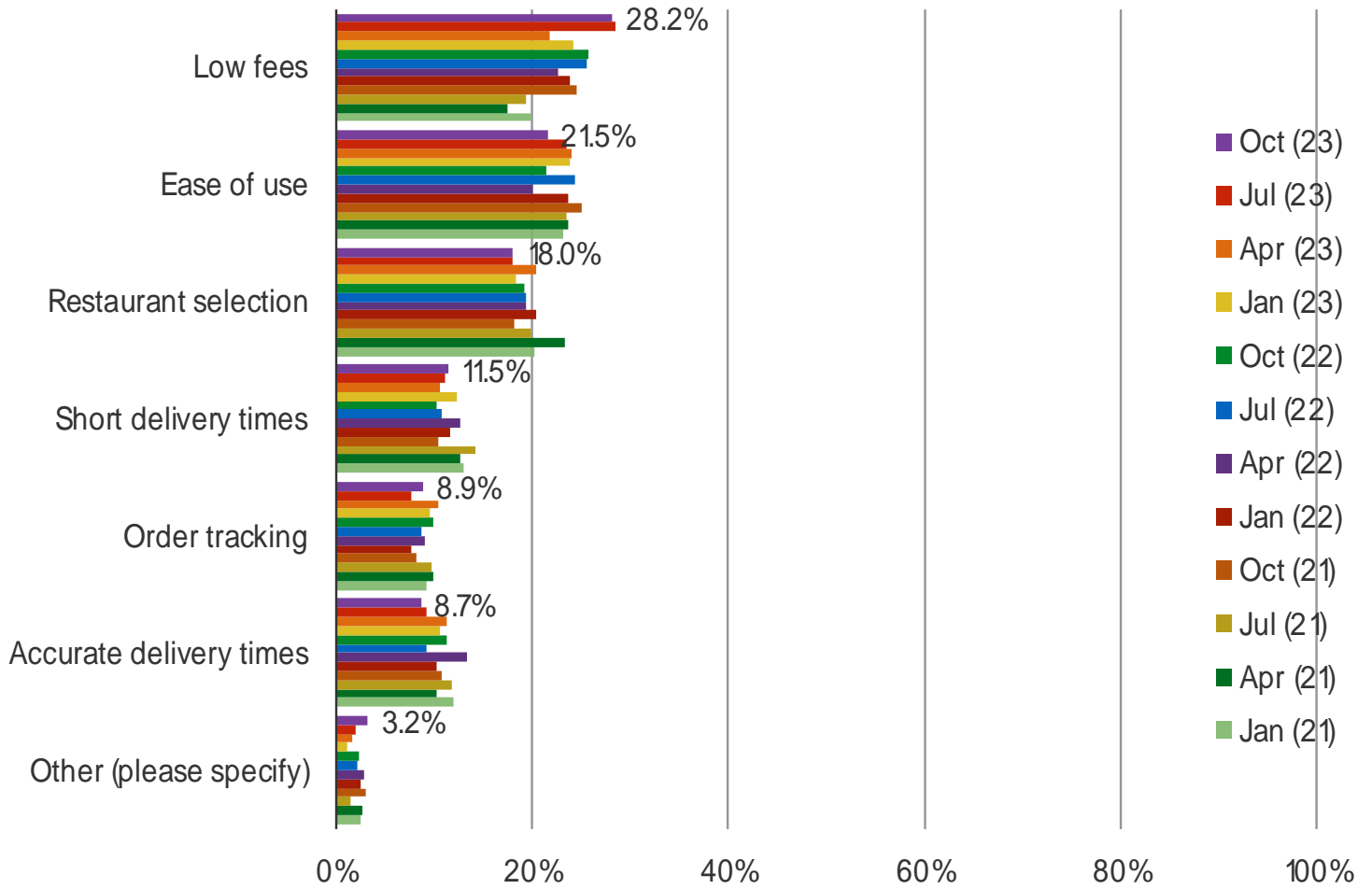
Postmates Users Also Use



	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85
None of the above	298

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

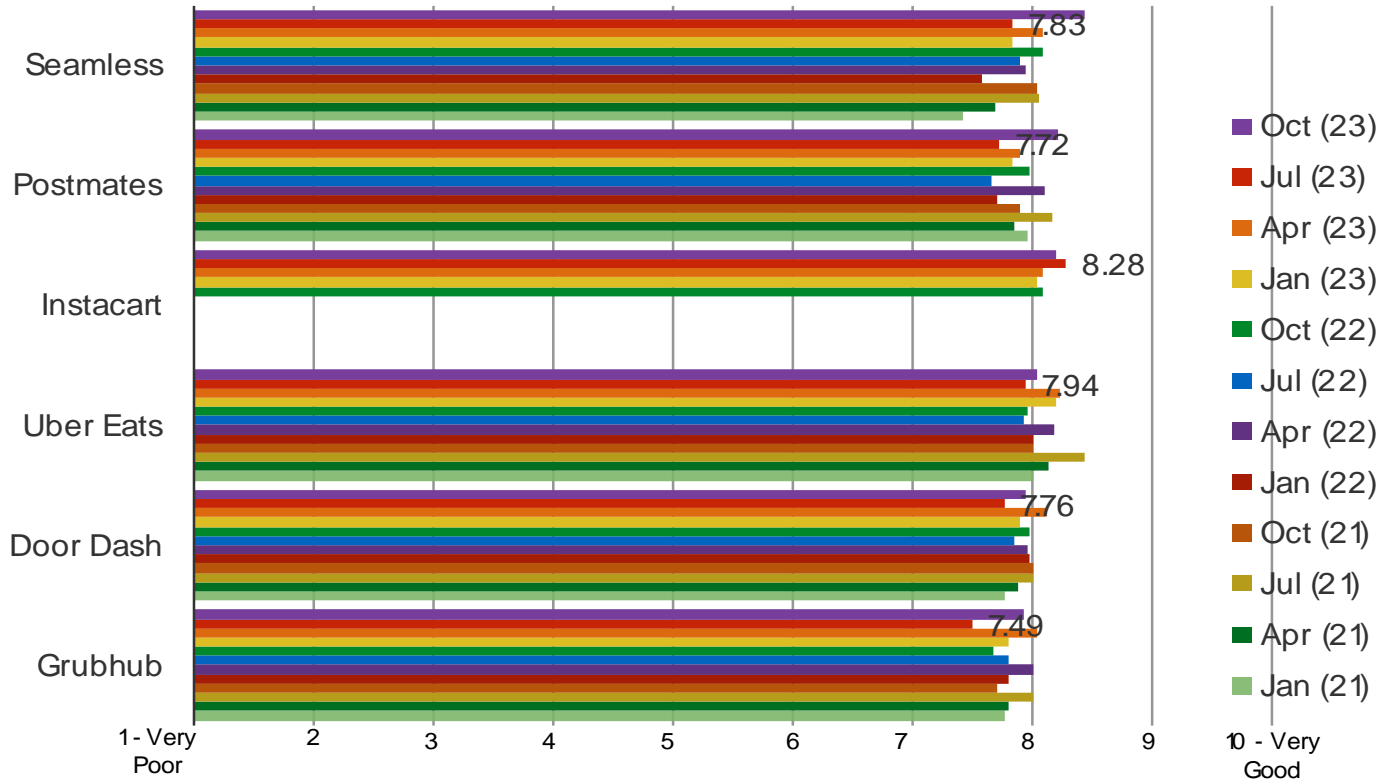
Posed to respondents who use food delivery apps.



N = 932

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

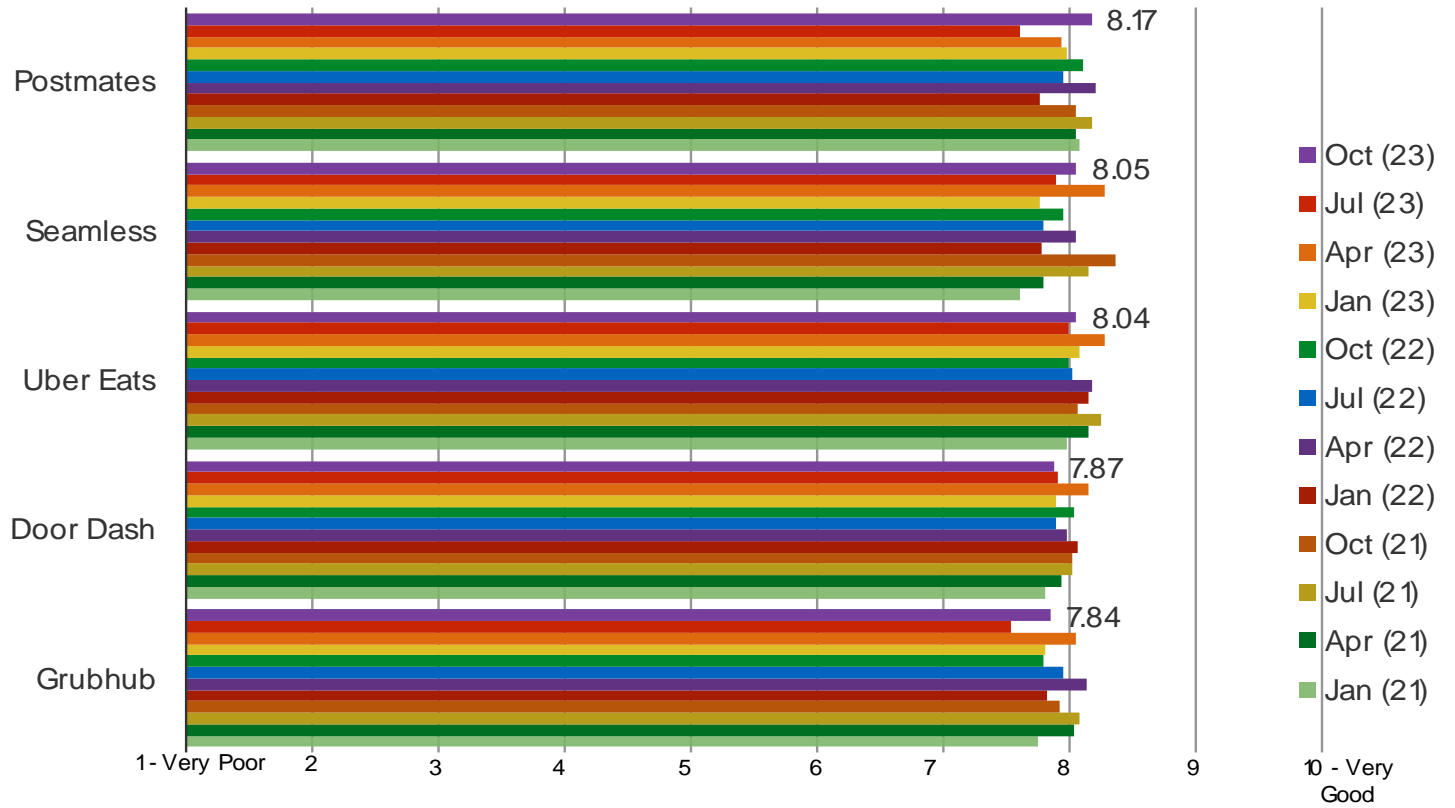
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	348
Door Dash	464
Seamless	59
Grubhub	219
Postmates	96
Instacart	128

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

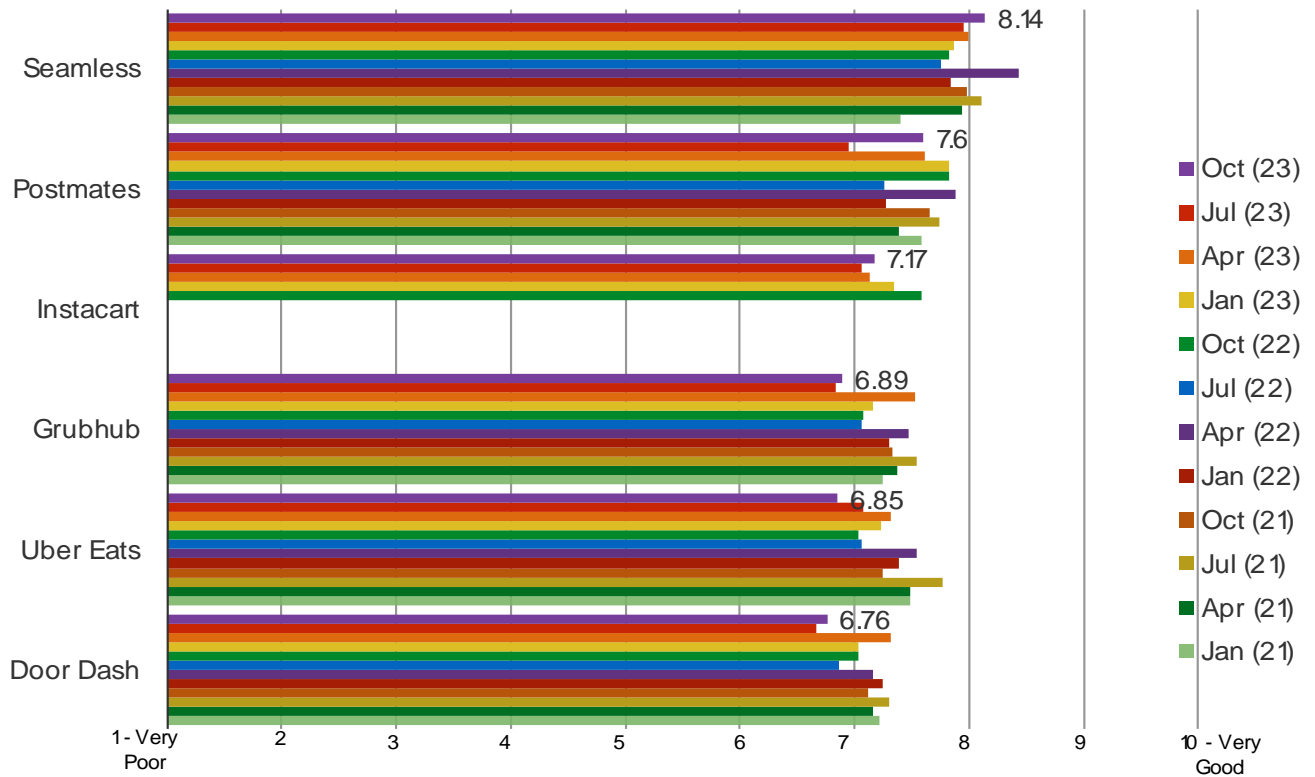
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	348
Door Dash	464
Seamless	59
Grubhub	219
Postmates	96
Instacart	128

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

Posed to respondents who have the following downloaded on their smartphone.

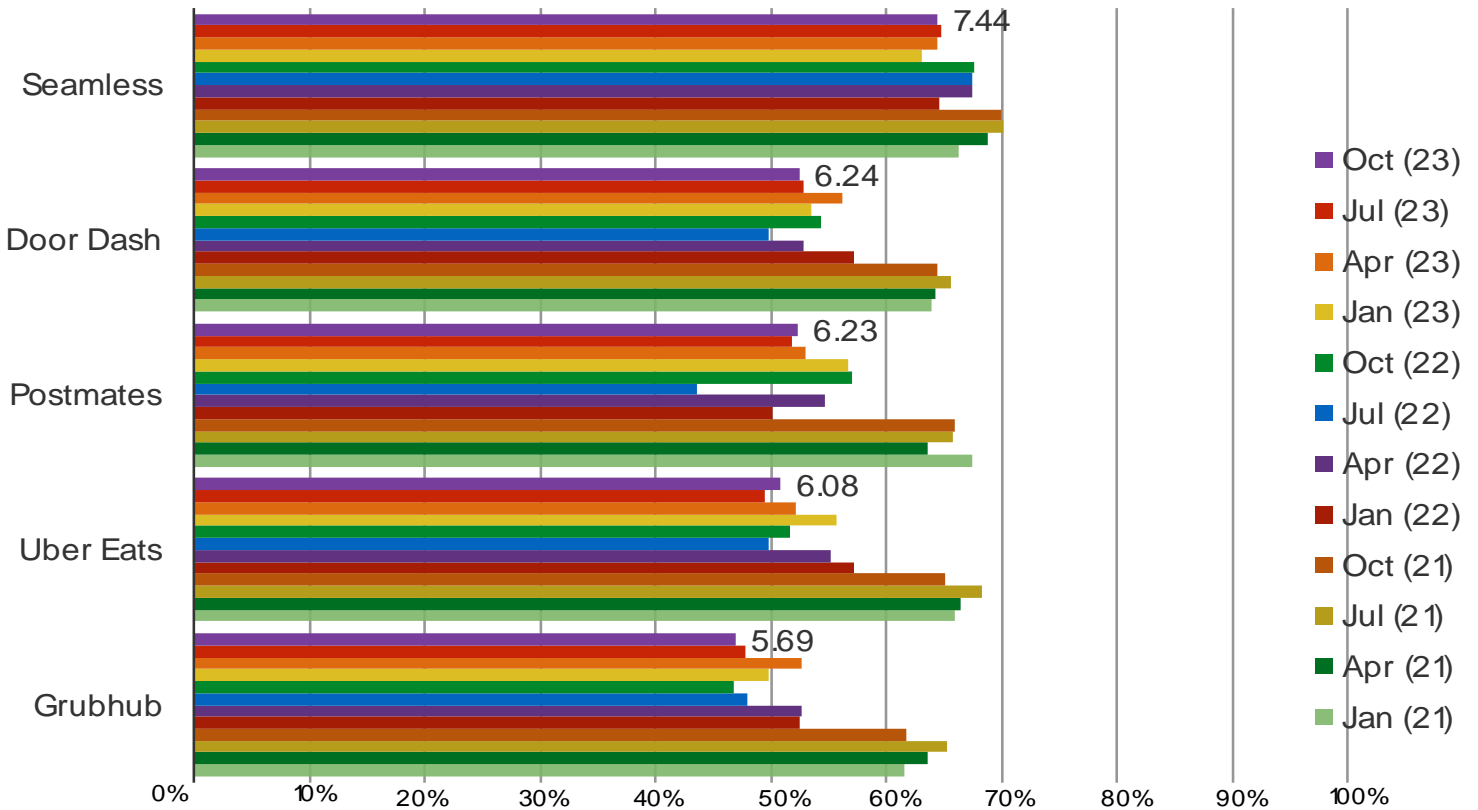


	N=
Uber Eats	348
Door Dash	464
Seamless	59
Grubhub	219
Postmates	96
Instacart	128

Food Delivery

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

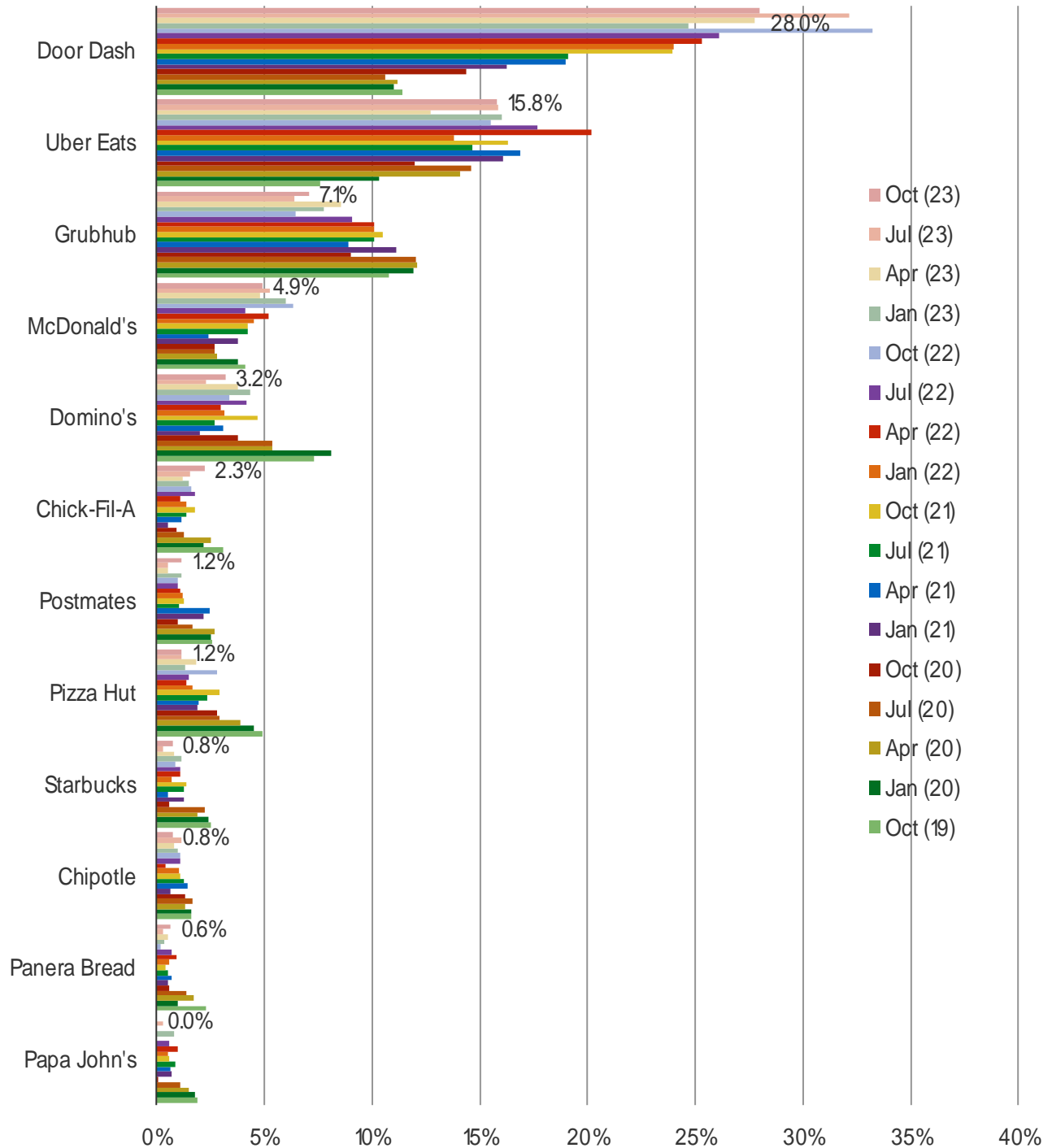
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	348
Door Dash	464
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Grubhub	219
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Instacart	128

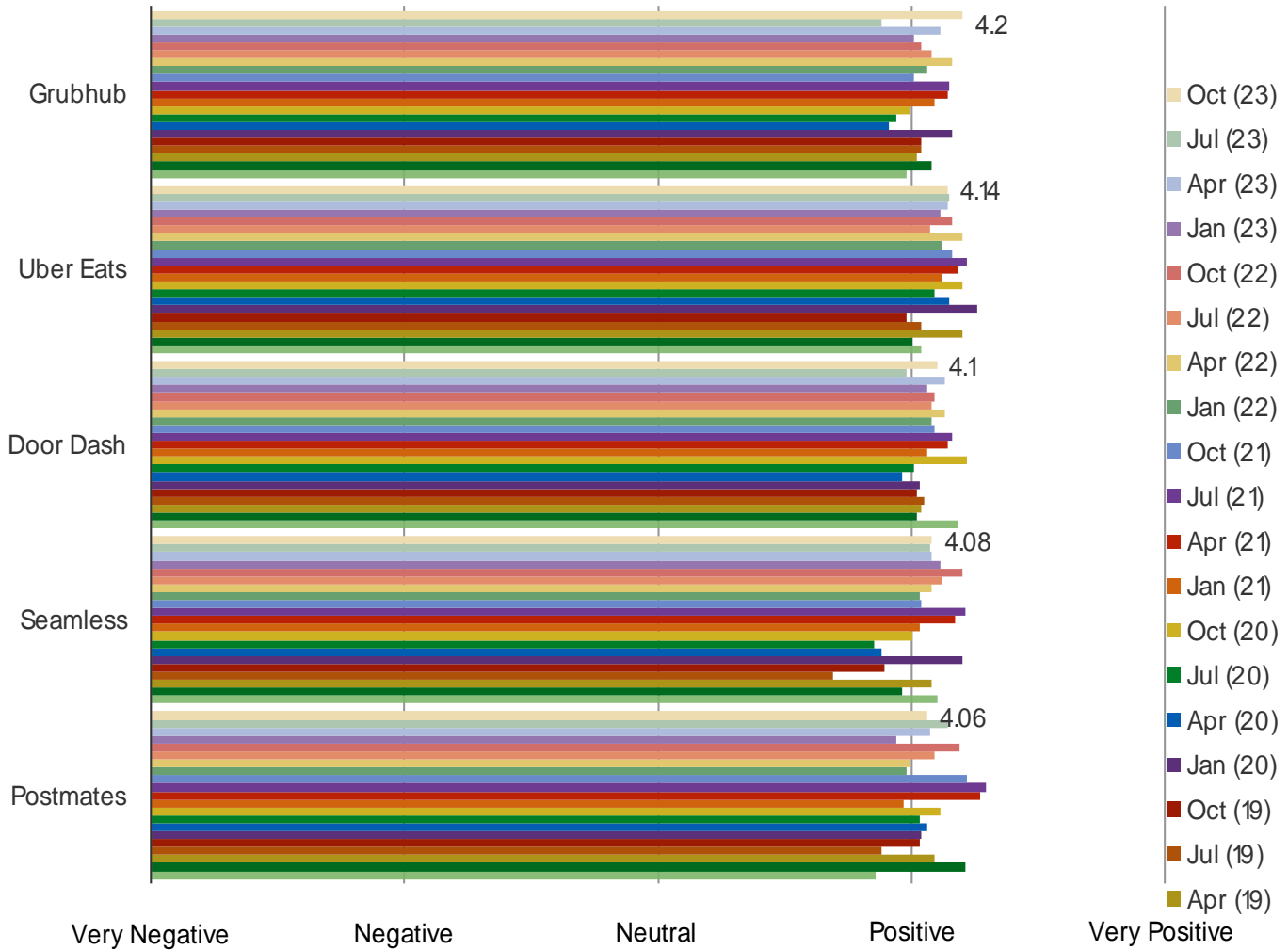
WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



WHAT IS YOUR OPINION OF THE PLATFORM?

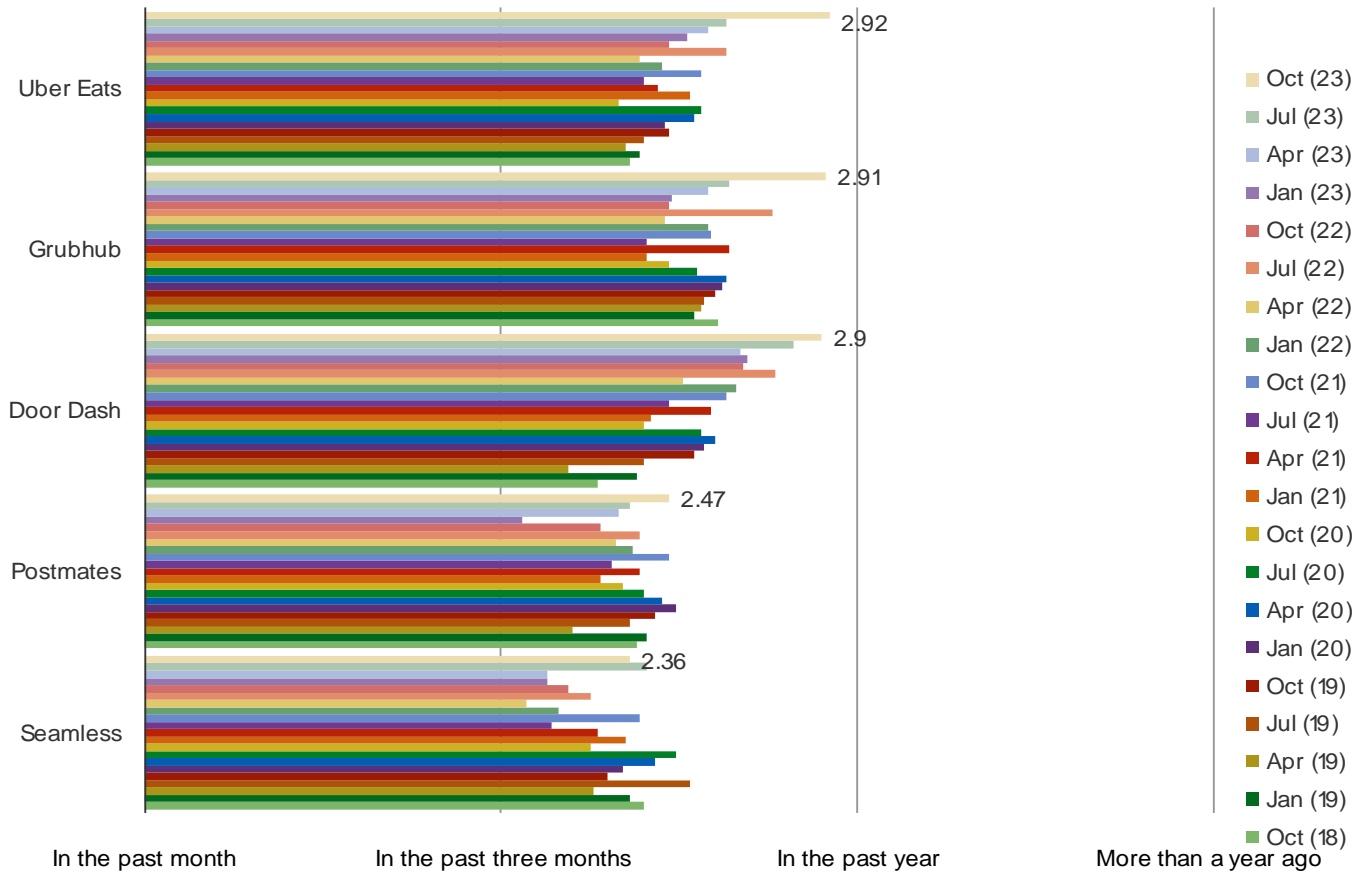
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85

WHEN DID YOU FIRST START USING THIS PLATFORM?

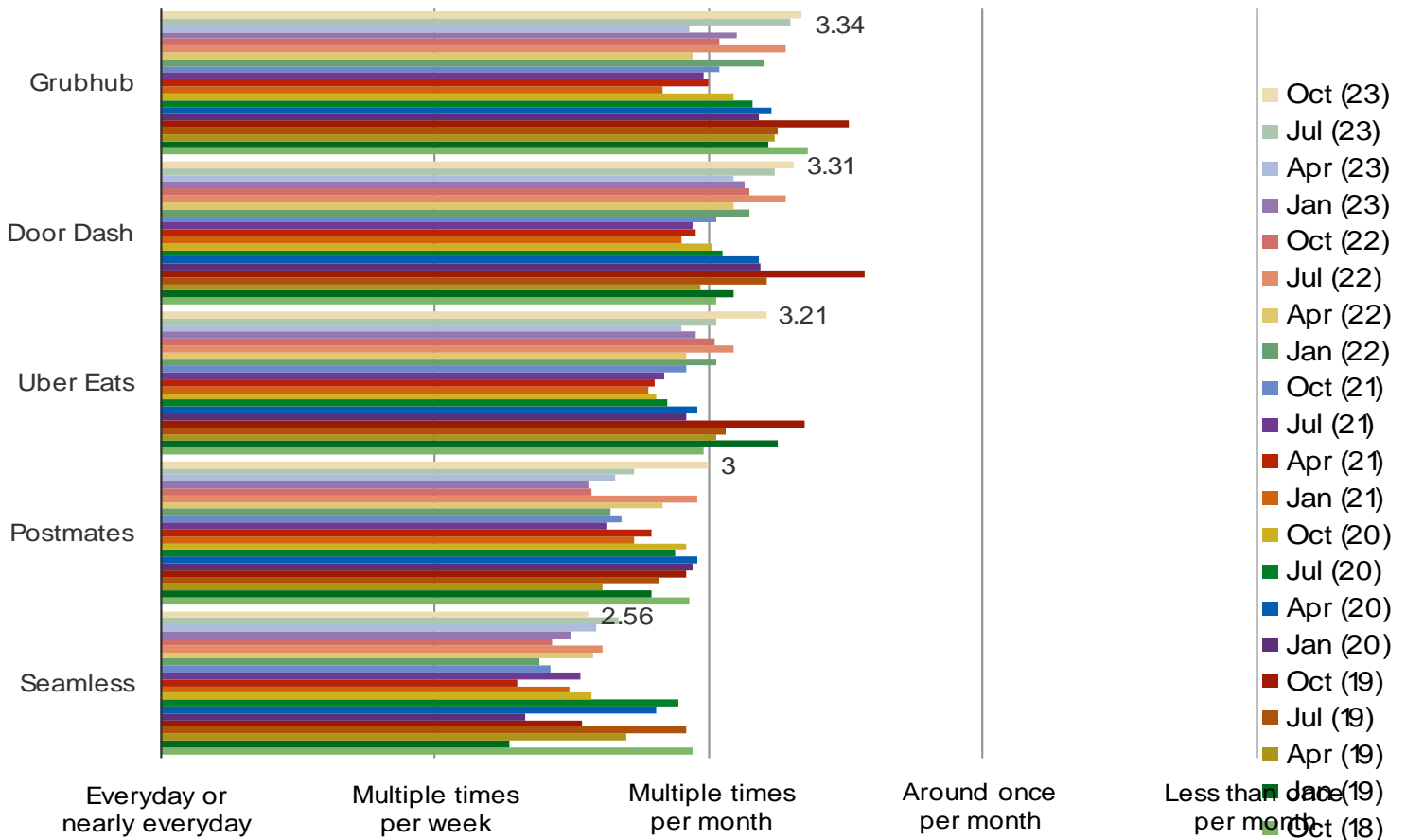
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85

HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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



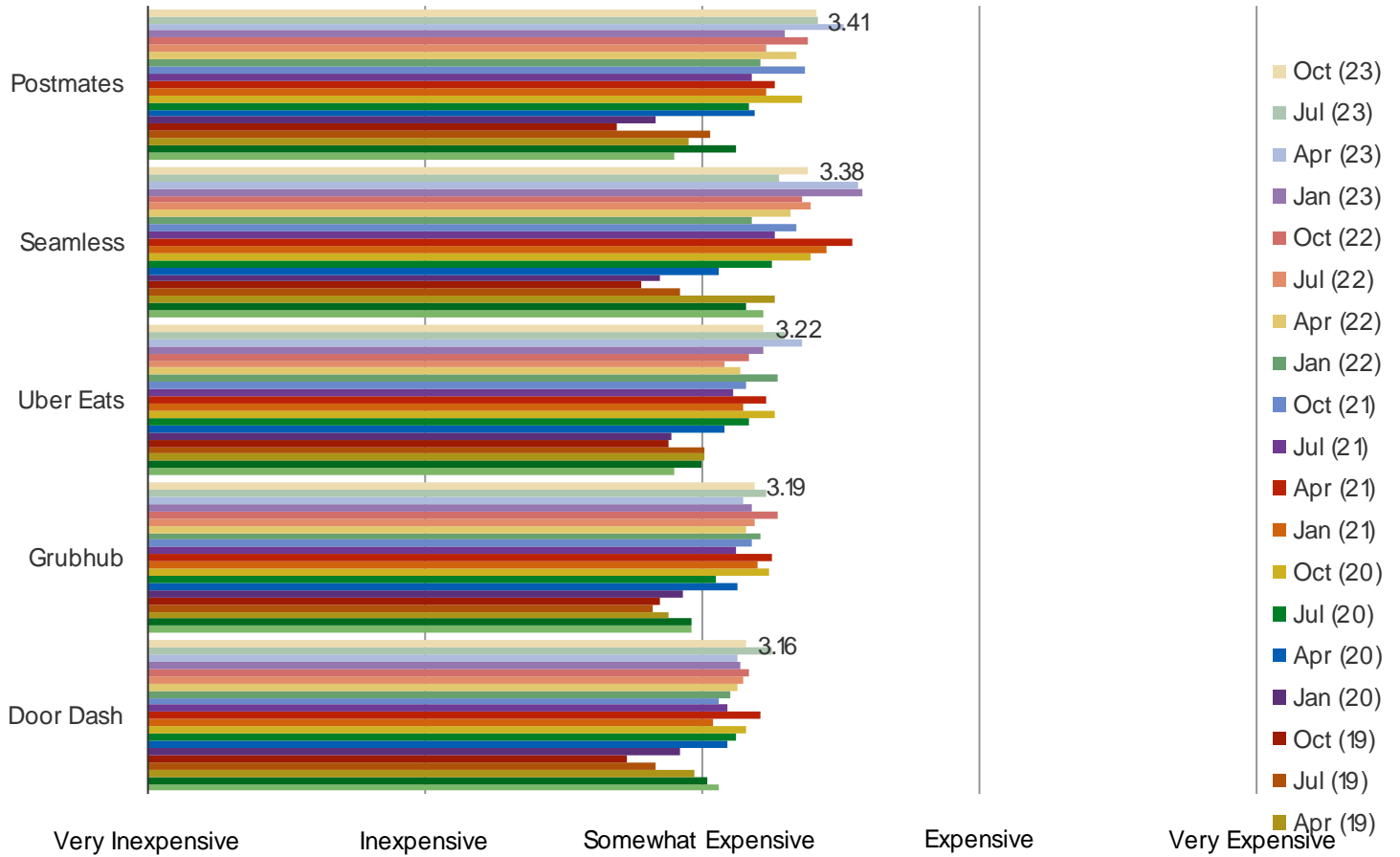
More Frequent

	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85

Food Delivery

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

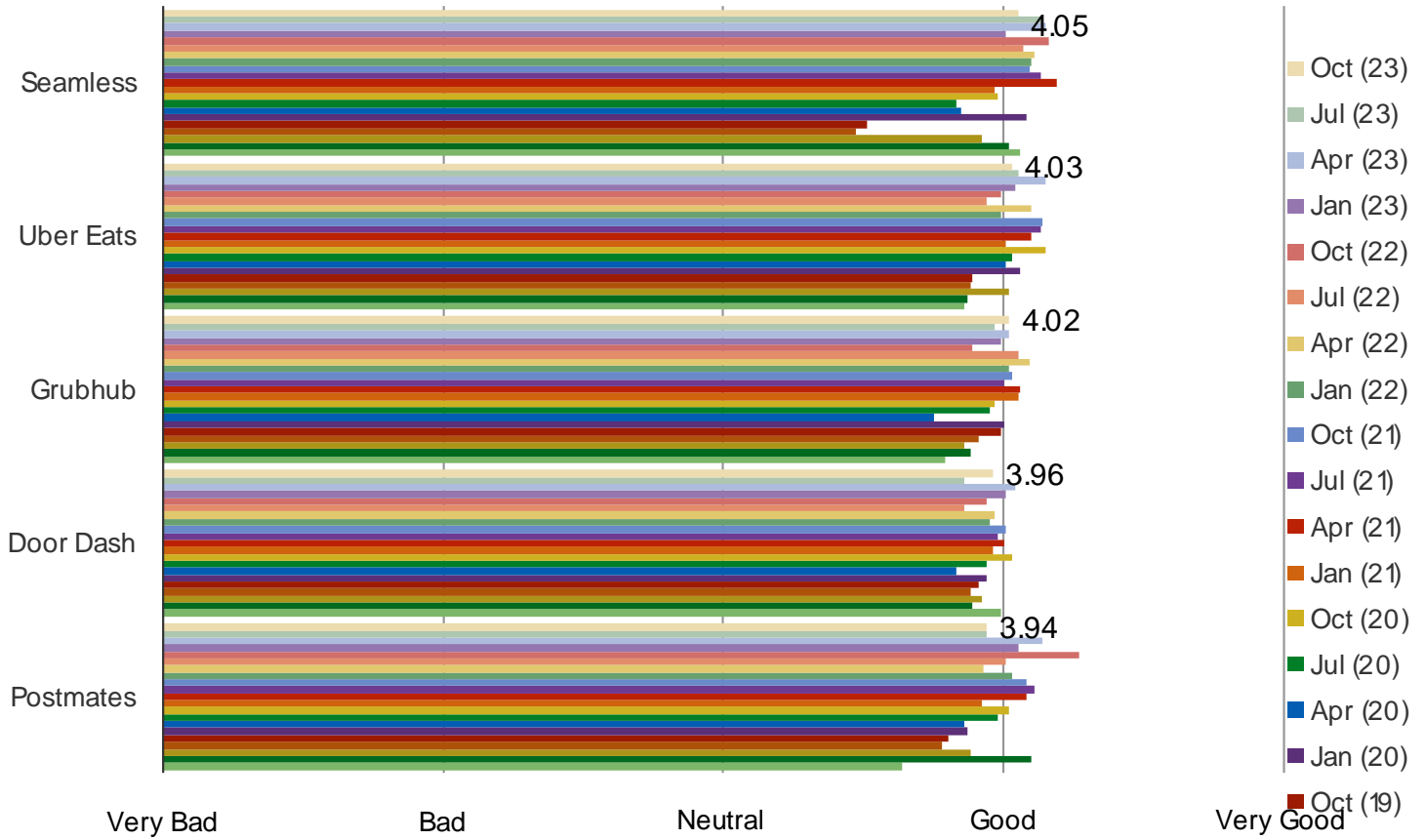
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85

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

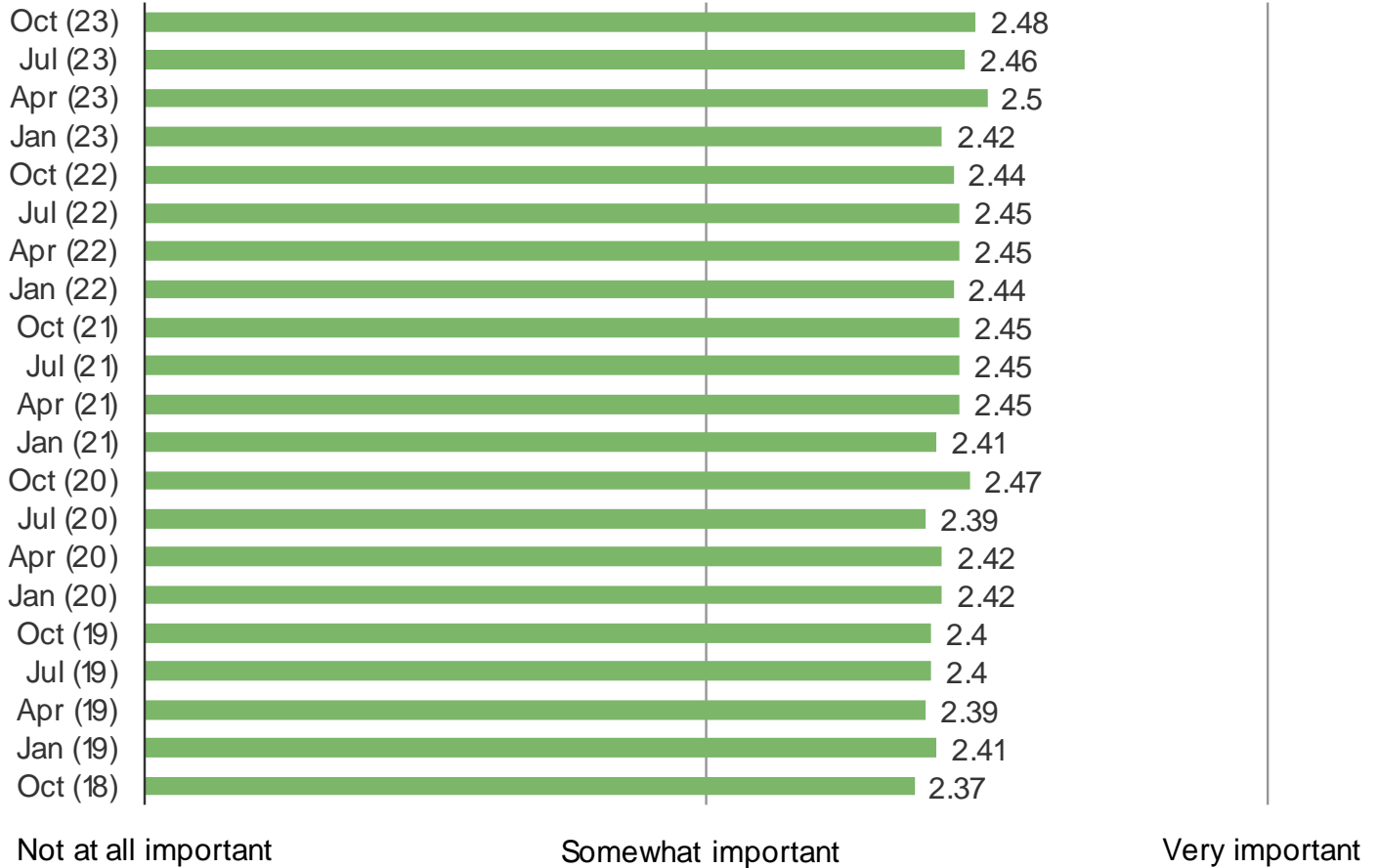
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	299
Door Dash	412
Seamless	61
Grubhub	198
Postmates	85

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.

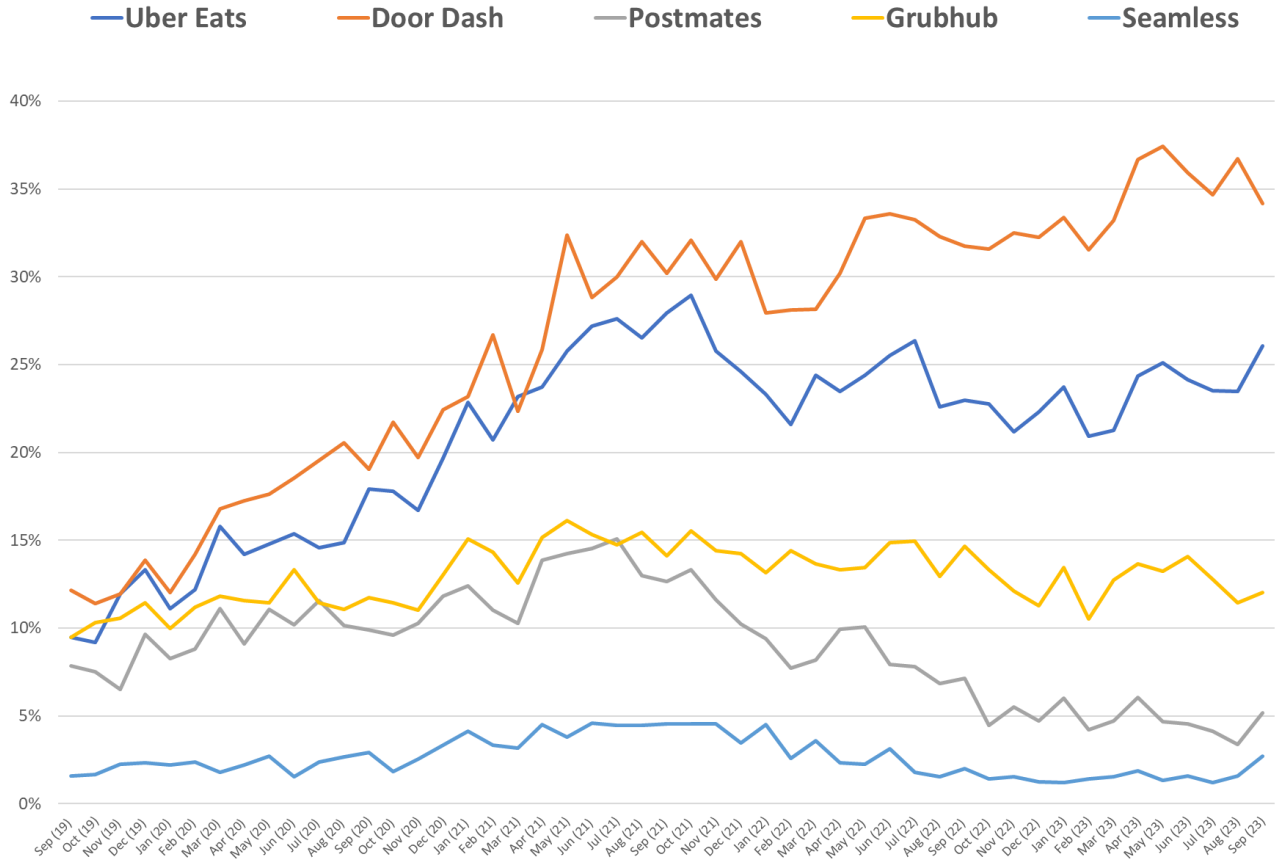


Food Delivery Apps

MONTHLY DATA

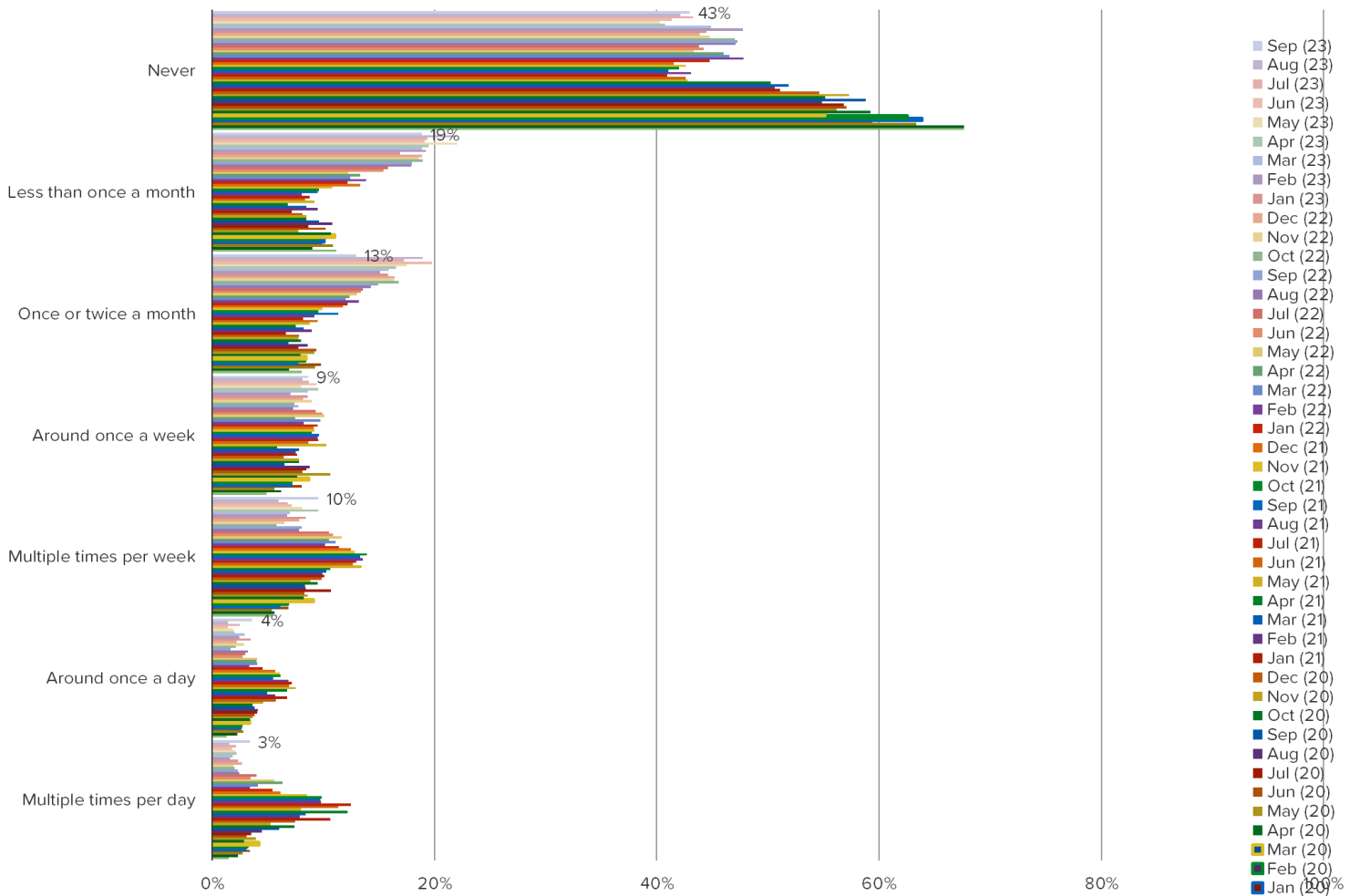
DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.



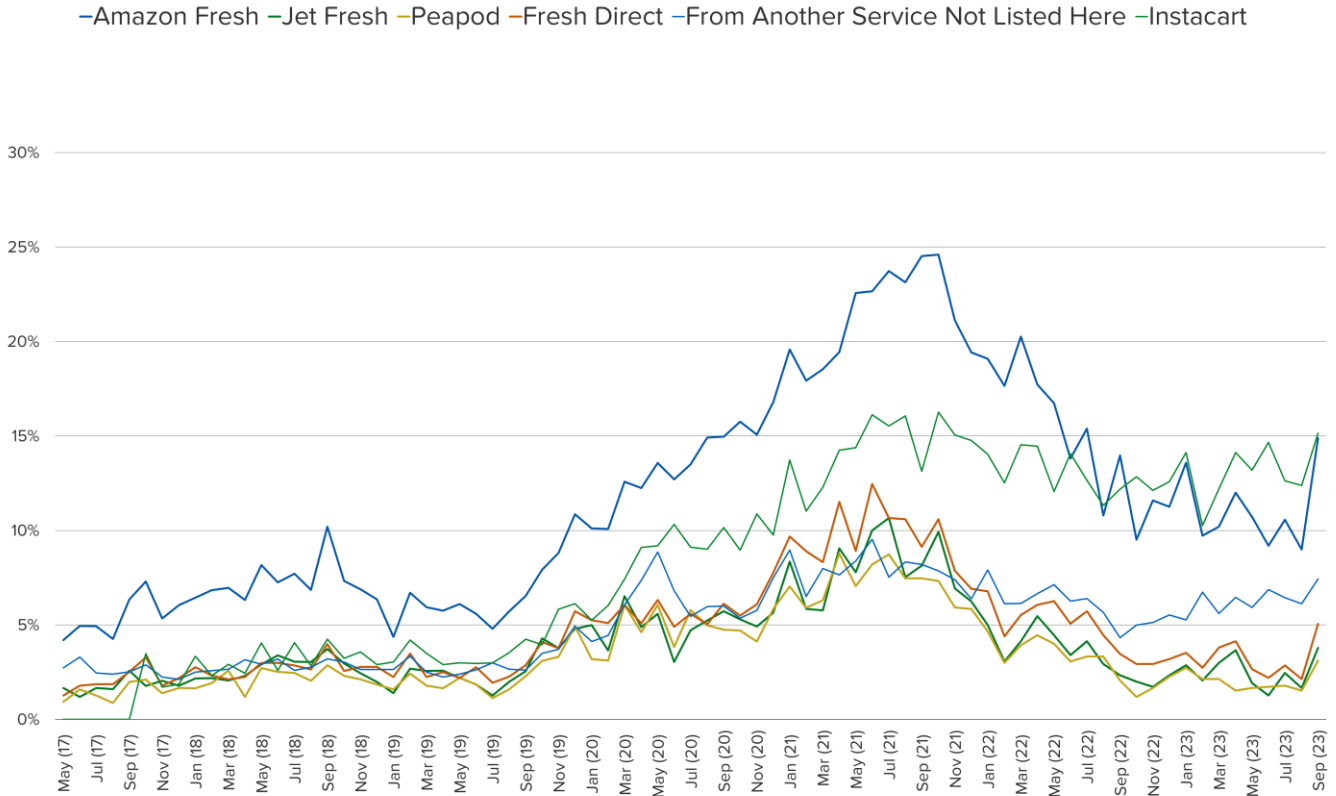
HOW OFTEN DO YOU USE FOOD DELIVERY APPS?

Posed to all respondents.



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

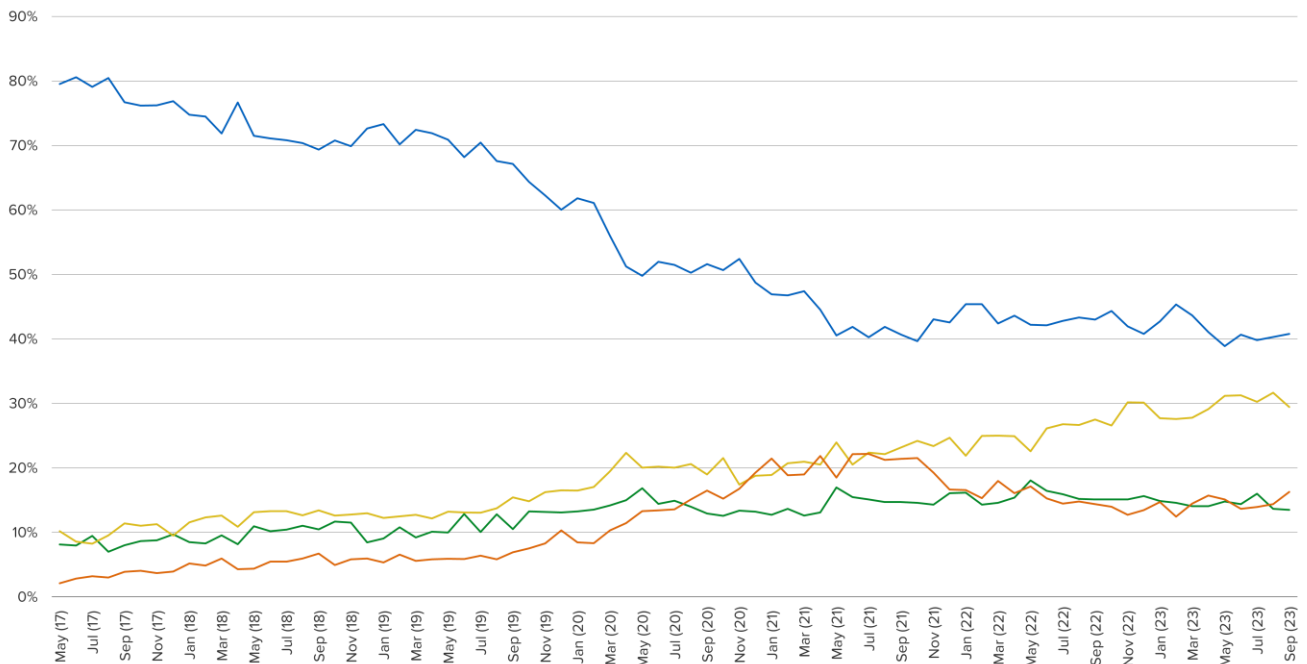
Posed to all respondents.



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

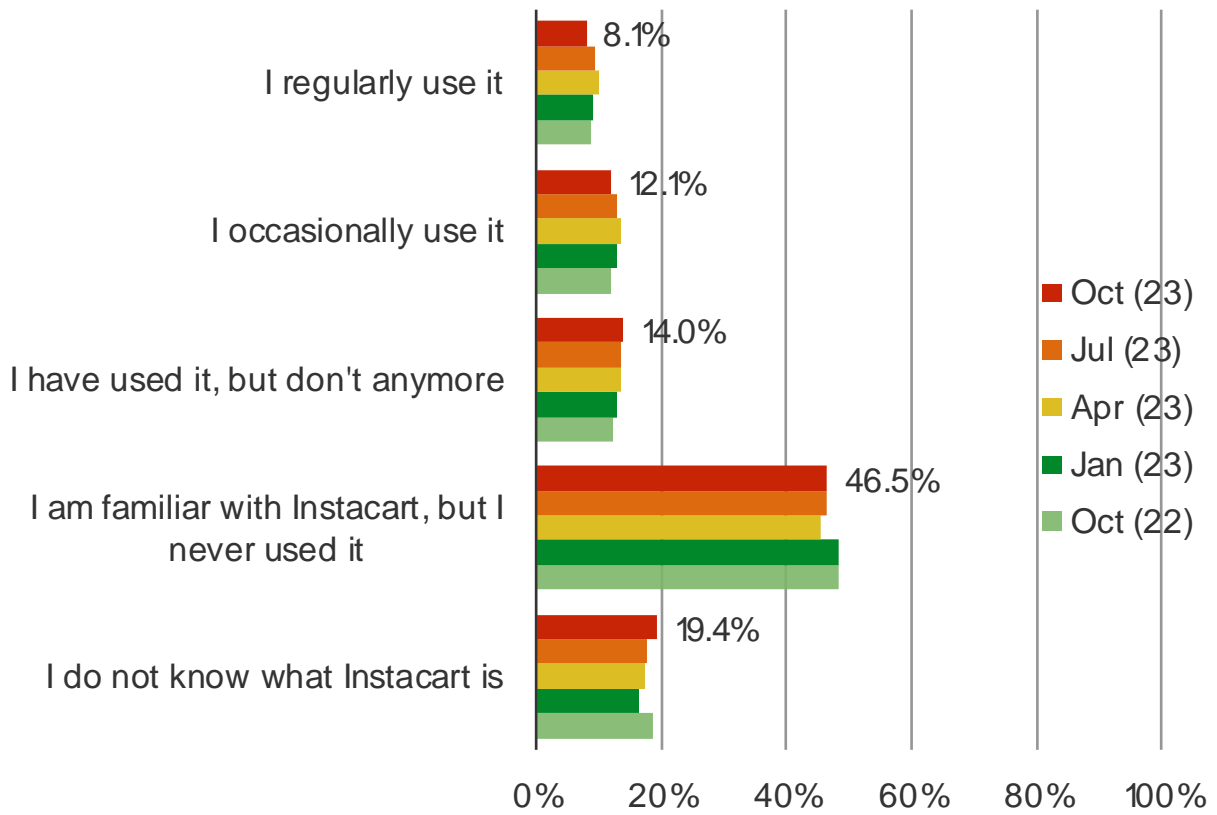


Food Delivery Apps

INSTACART

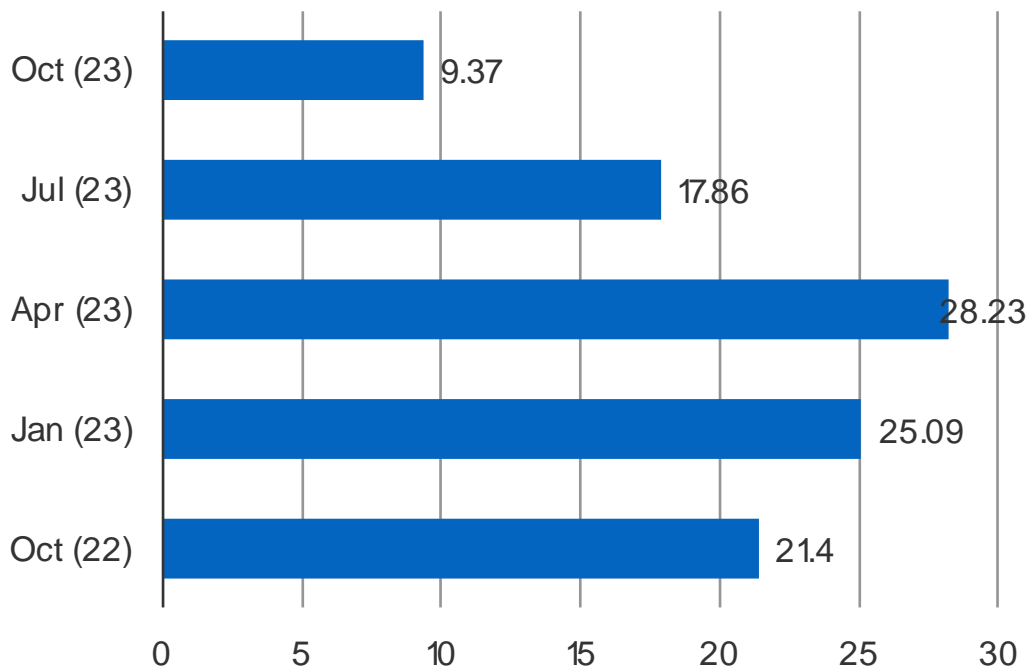
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

Posed to all respondents.



HOW LIKELY IS IT THAT YOU WOULD RECOMMEND INSTACART TO A FRIEND OR COLLEAGUE?

Posed to all respondents who have ever used Instacart.



WHAT DO YOU LIKE MOST/LEAST ABOUT INSTACART?

Posed to all respondents who have ever used Instacart.

MOST

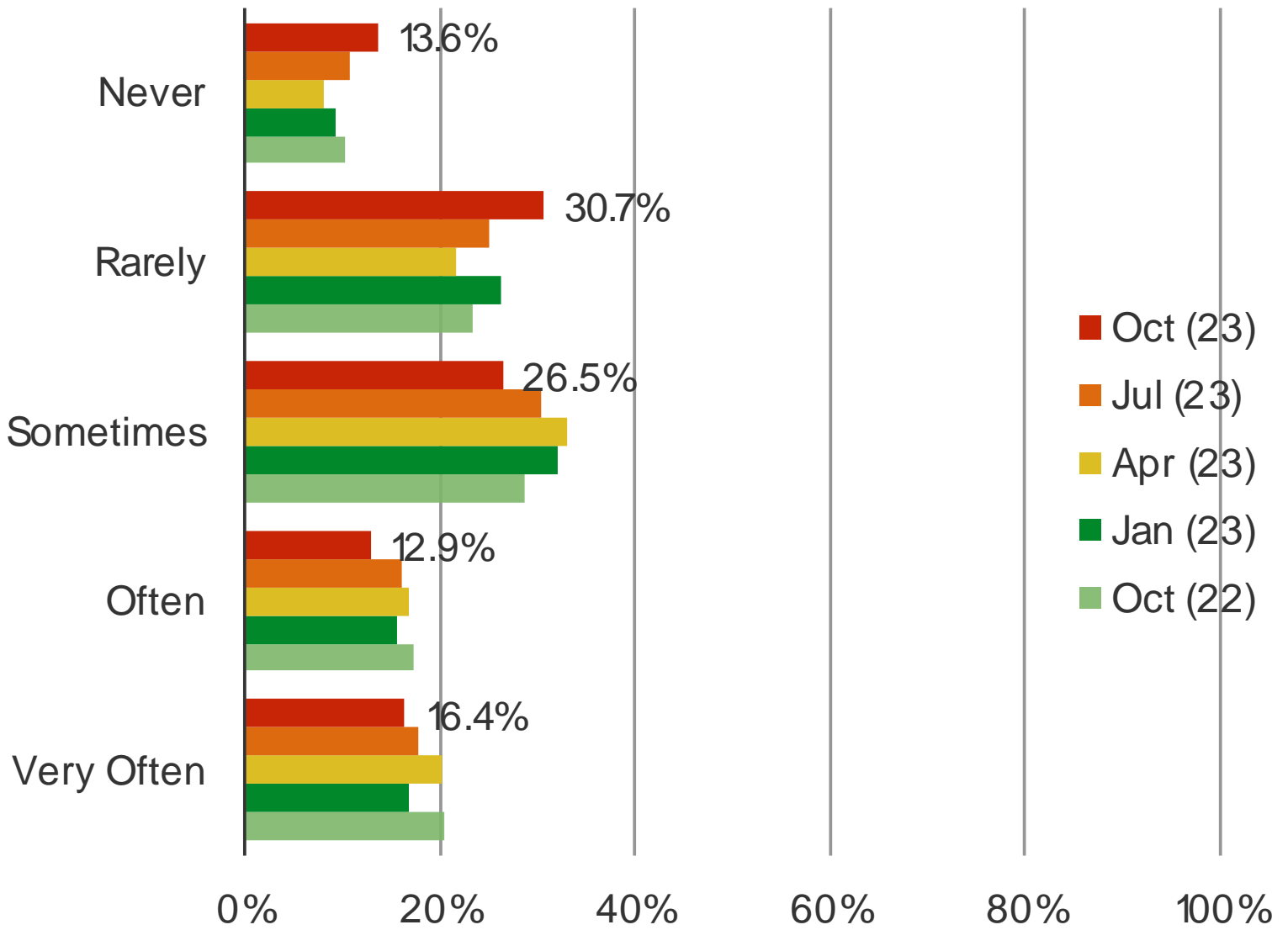


LEAST



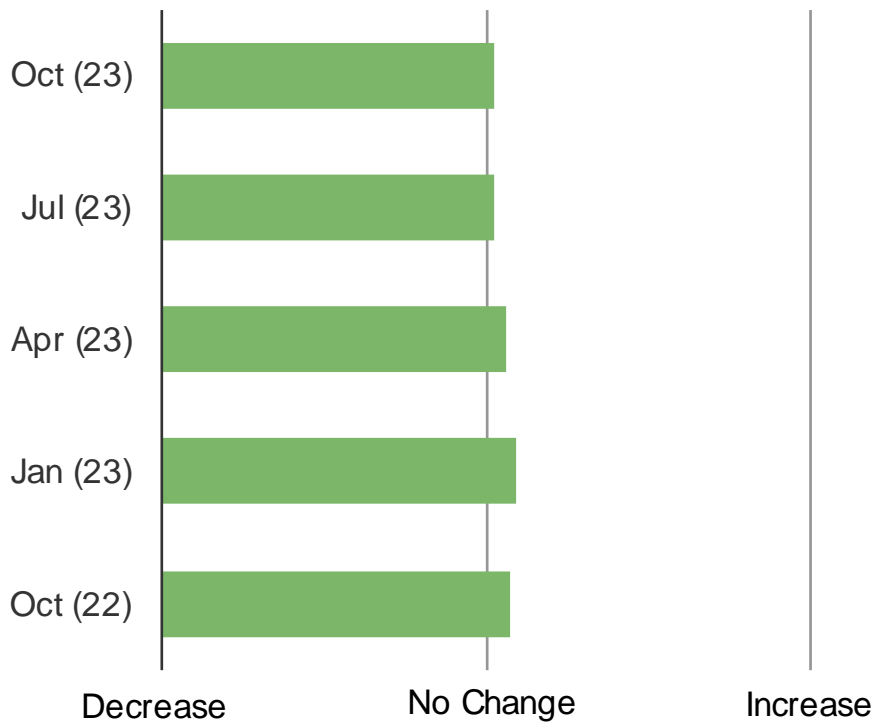
HOW OFTEN DO YOU USE INSTACART?

Posed to all respondents who have ever used Instacart.



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

Posed to all respondents who have ever used Instacart (N = 427)



October 2023 Data

