

Bespoke Survey Research

January 2024

Pizza

Volume 18 | Quarterly Survey
1,250 US Consumers Balanced To Census
Tickers Covered: DPZ, YUM, PZZA.

Key Takeaways:

DPZ TAKEAWAYS

- ❑ Awareness of the availability of Domino's on Uber Eats has declined q/q.
- ❑ Domino's customers continue to show a preference for ordering through the Domino's app vs. Uber Eats. The share who prefer Uber Eats has actually declined somewhat relative to our October 2023 update.
- ❑ Like we have observed for other casual dining platforms in our surveys, feedback around engagement is softer sequentially for DPZ.
- ❑ The share of consumers who say their usage of third party food delivery apps impacts their usage negatively continues to decline and reached a new series low this quarter.
- ❑ Domino's prices continue to increase in importance for customers (taste remains the main driver of business per our trackers).

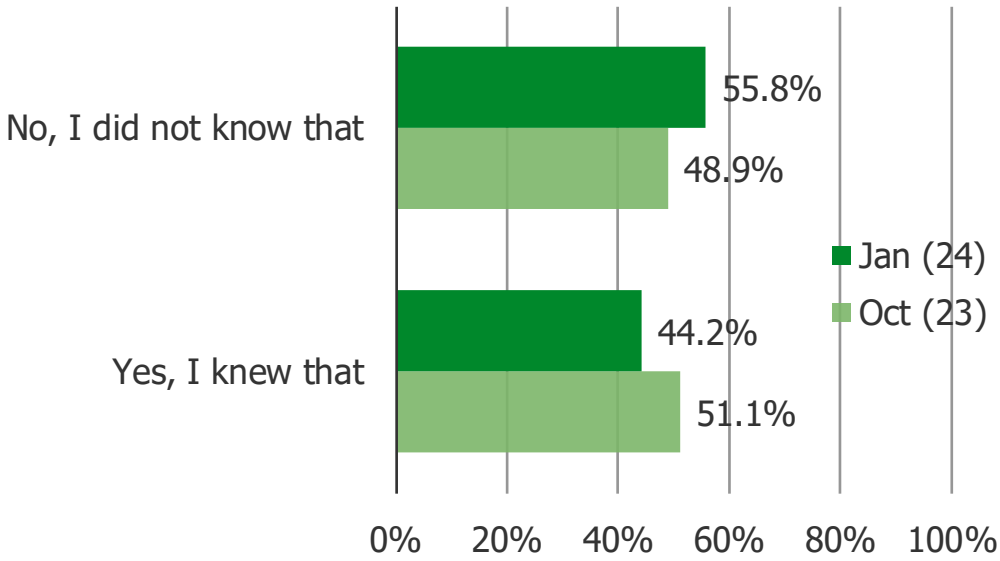
Noteworthy Stats:

- 44.2%** Of Domino's customers are aware that Domino's is now available on Uber Eats.
- 58.6%** Of Domino's customers would prefer to order Domino's from the Domino's app vs. Uber Eats.
- 41.3%** 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.

NEW QUESTIONS THIS QUARTER

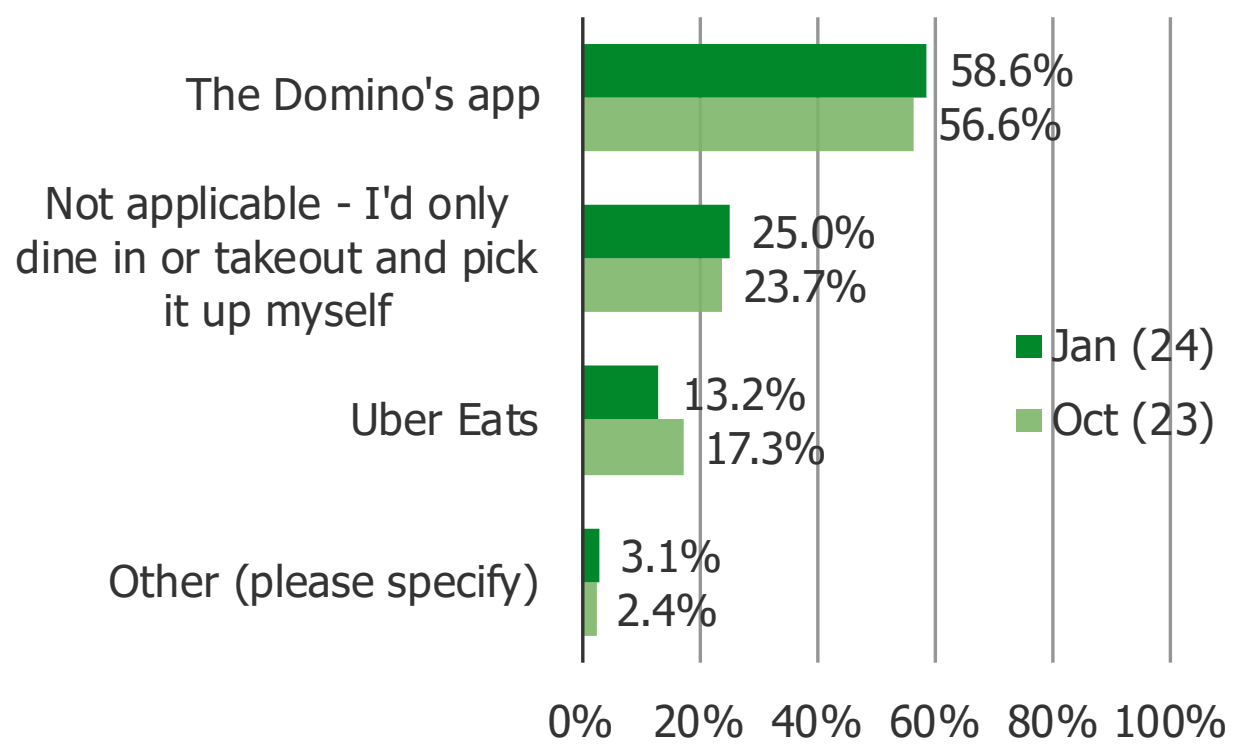
BEFORE TAKING THIS SURVEY, DID YOU KNOW THAT DOMINO'S IS NOW AVAILABLE IN SOME LOCATIONS TO ORDER ON UBER EATS?

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



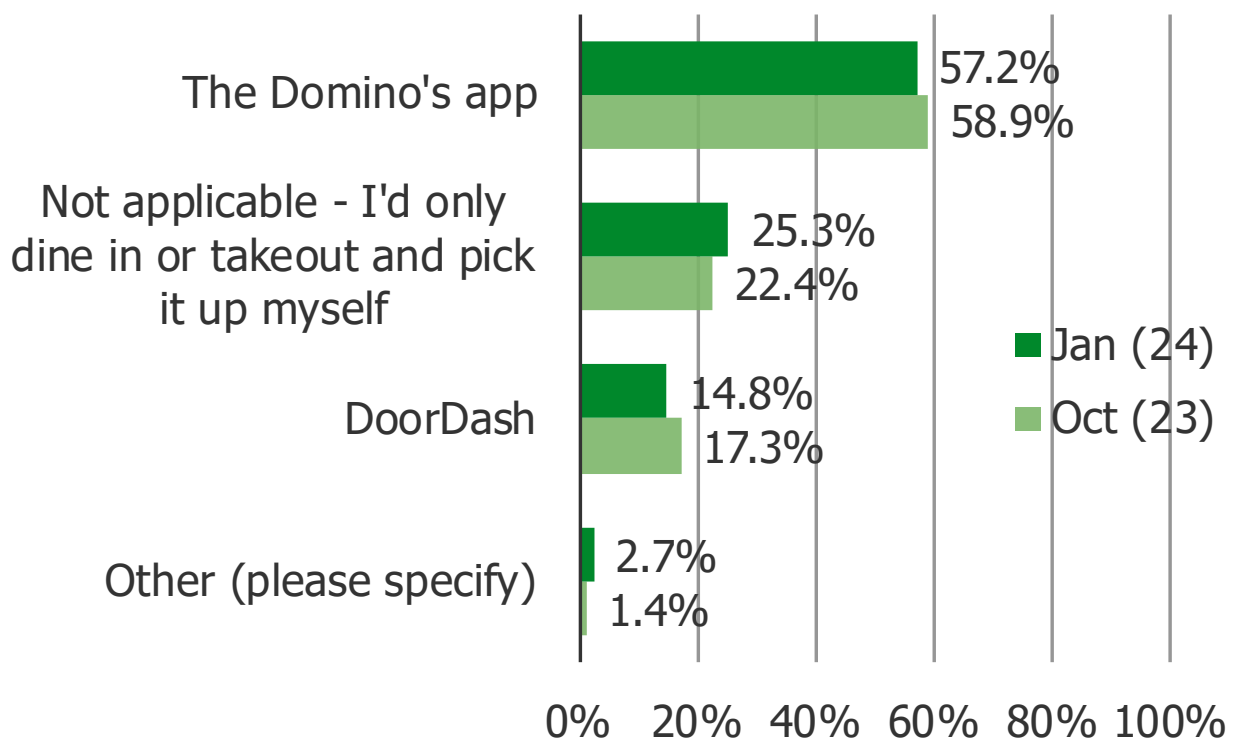
WHICH WOULD YOU PREFER TO ORDER DOMINO'S FROM?

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



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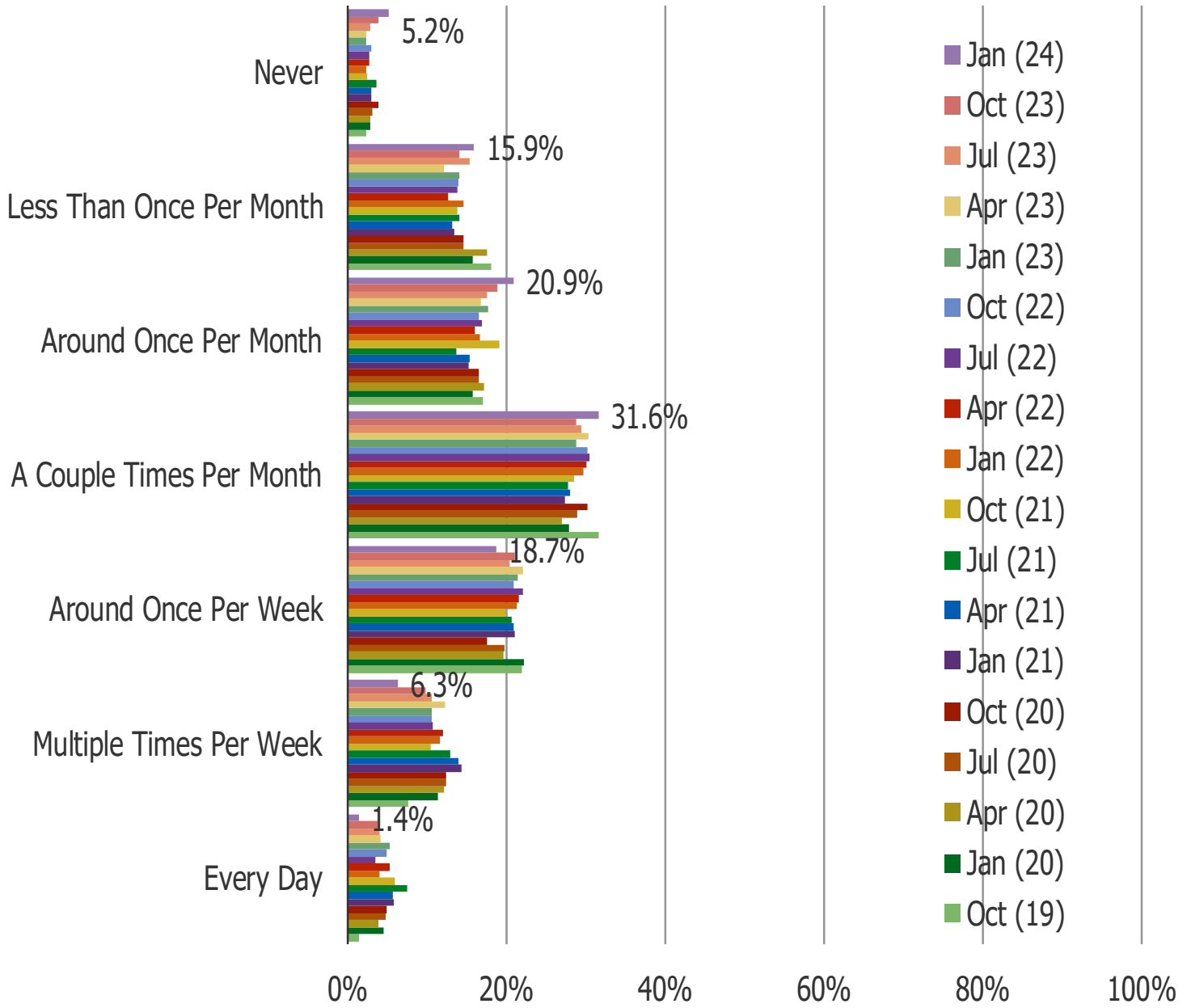
DPZ and Food Delivery Apps

PIZZA

PIZZA

HOW OFTEN DO YOU EAT PIZZA?

Posed to all respondents.

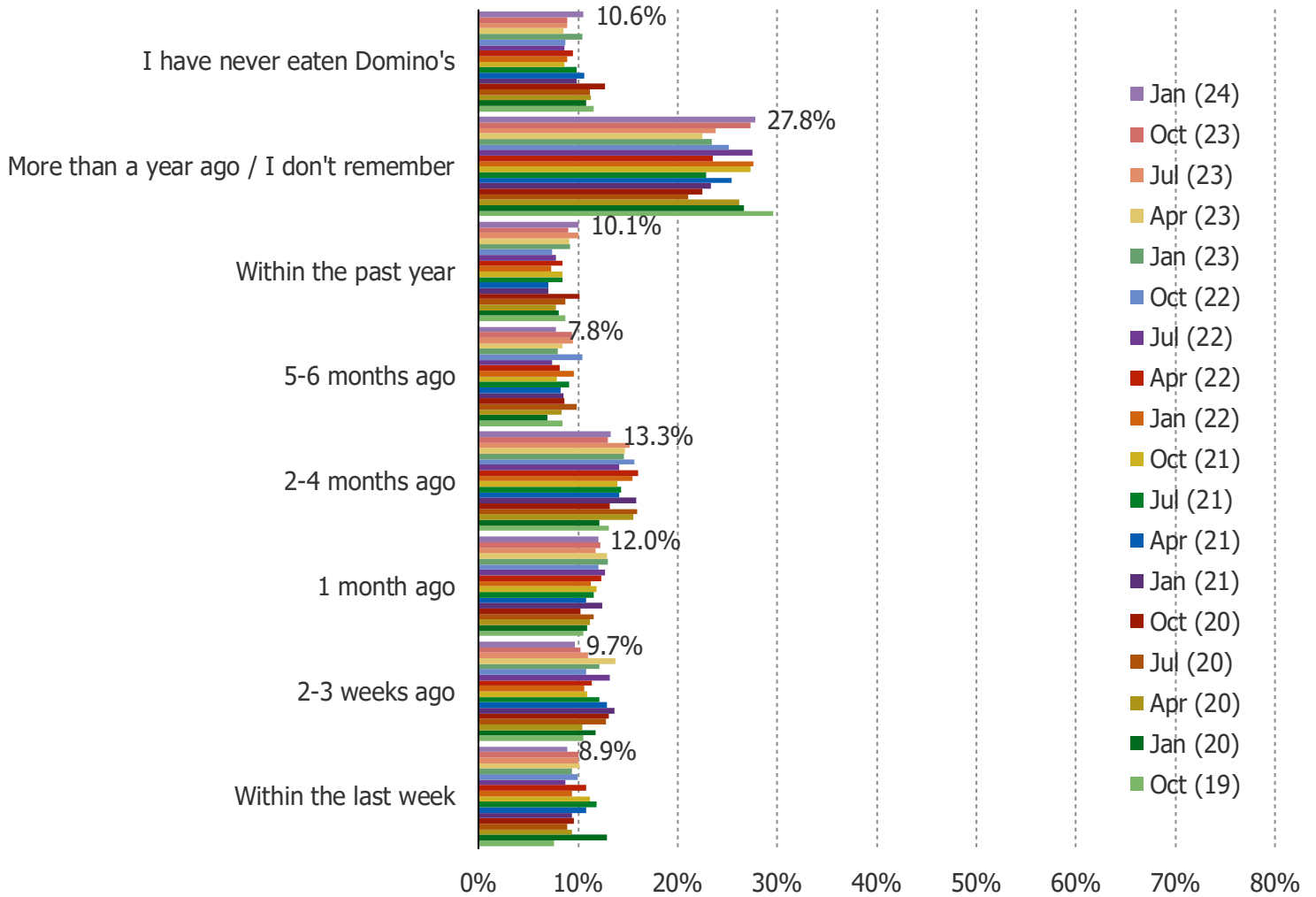


DPZ ENGAGEMENT

PIZZA

WHEN WAS THE LAST TIME YOU ATE DOMINO'S?

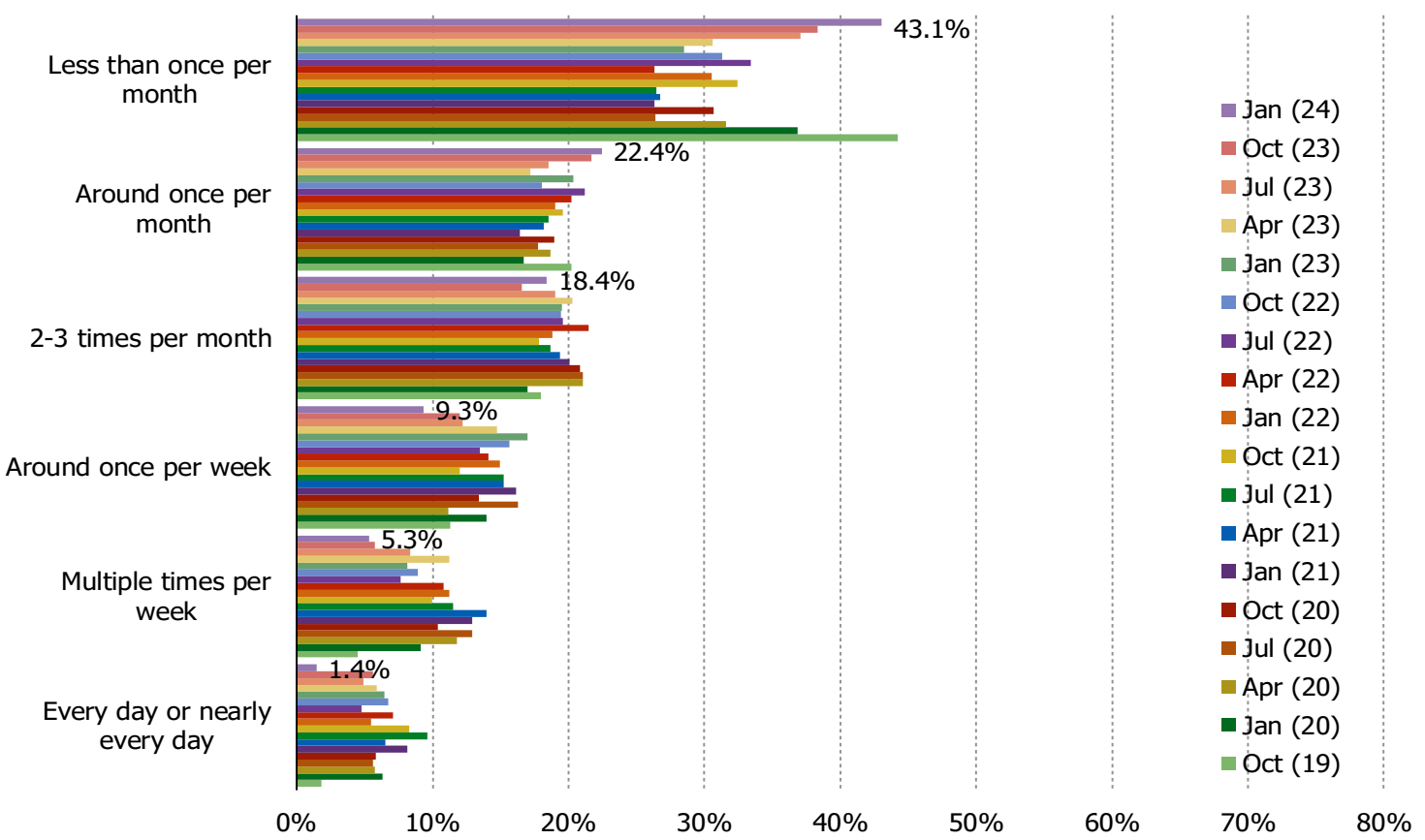
Posed to all respondents.



PIZZA

HOW FREQUENTLY DO YOU TYPICALLY EAT DOMINO'S?

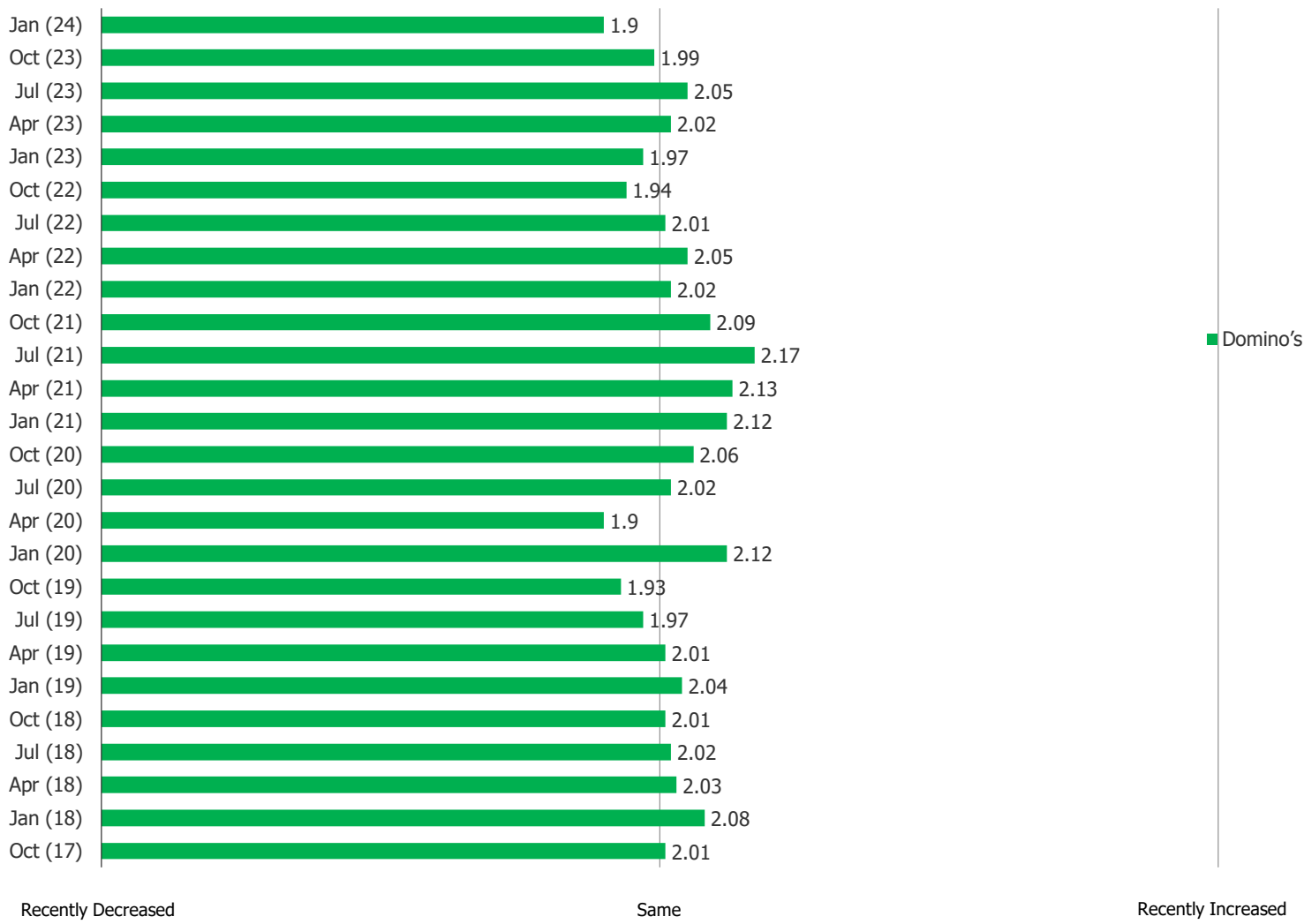
Posed to respondents who have eaten Domino's in the past year.



PIZZA

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

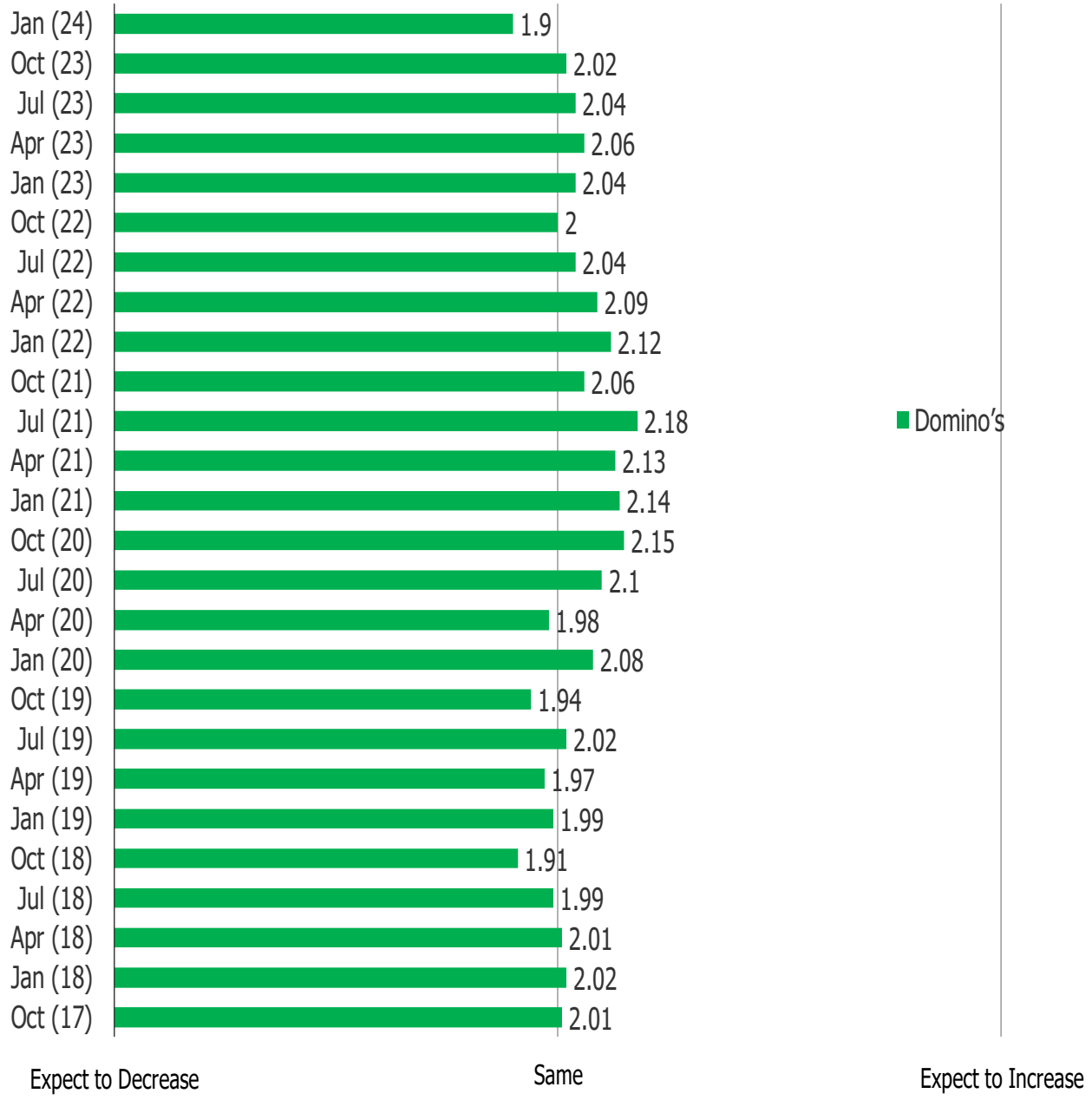
Posed to respondents who have eaten Domino's in the past year.



PIZZA

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

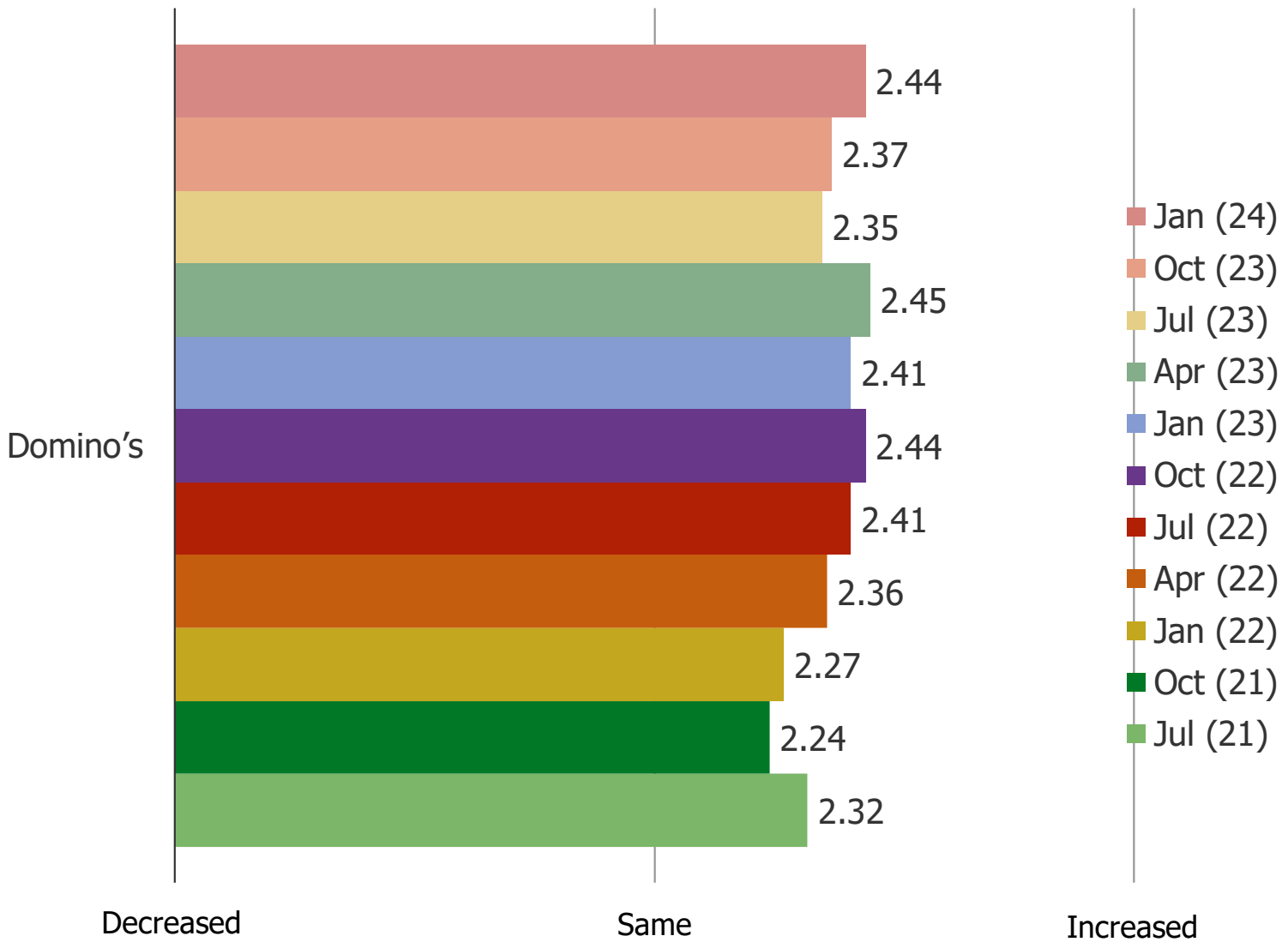
Posed to respondents who have eaten Domino's in the past year.



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.

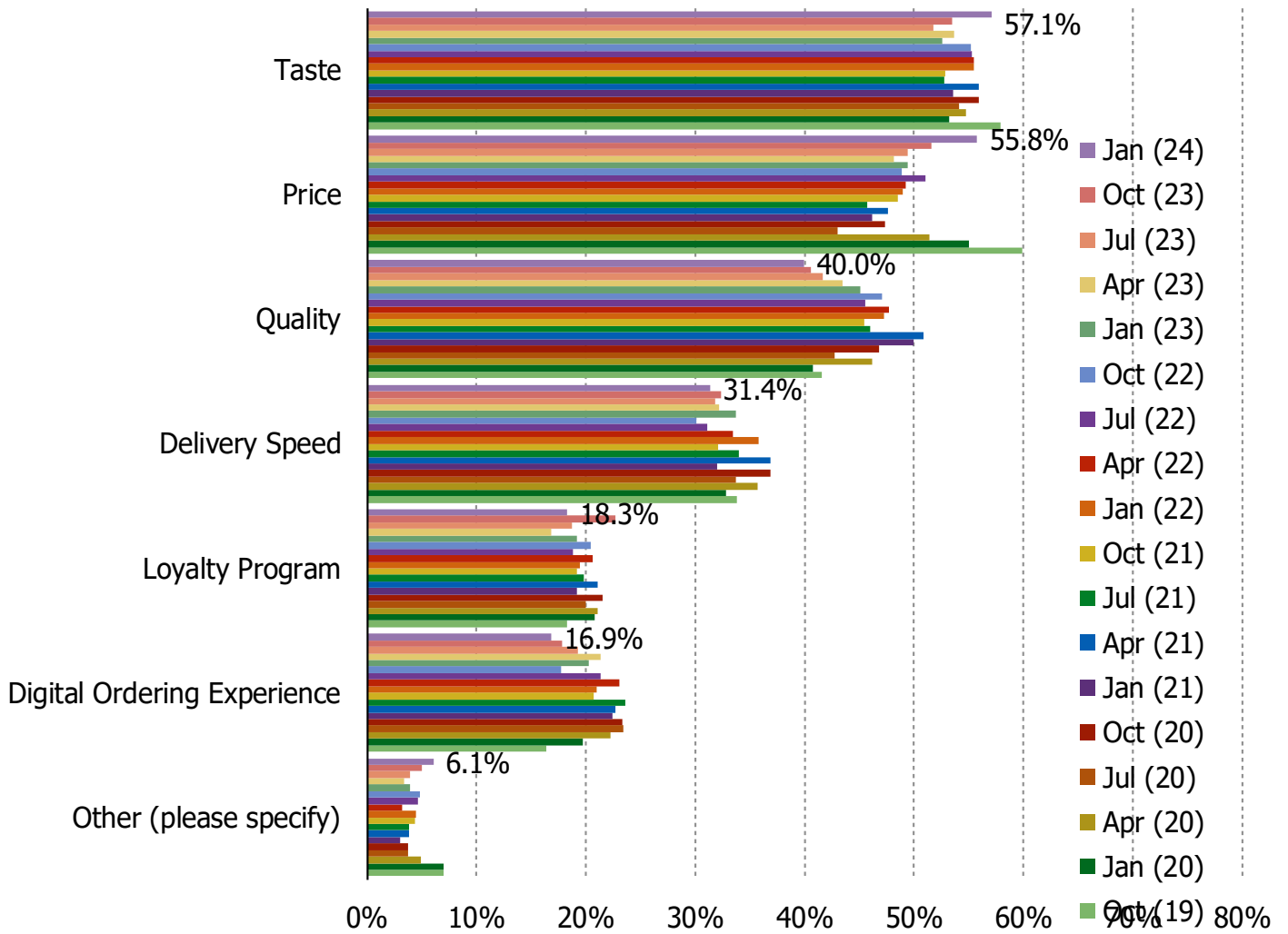


CATALYSTS AND MOBILE ORDERING

PIZZA

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

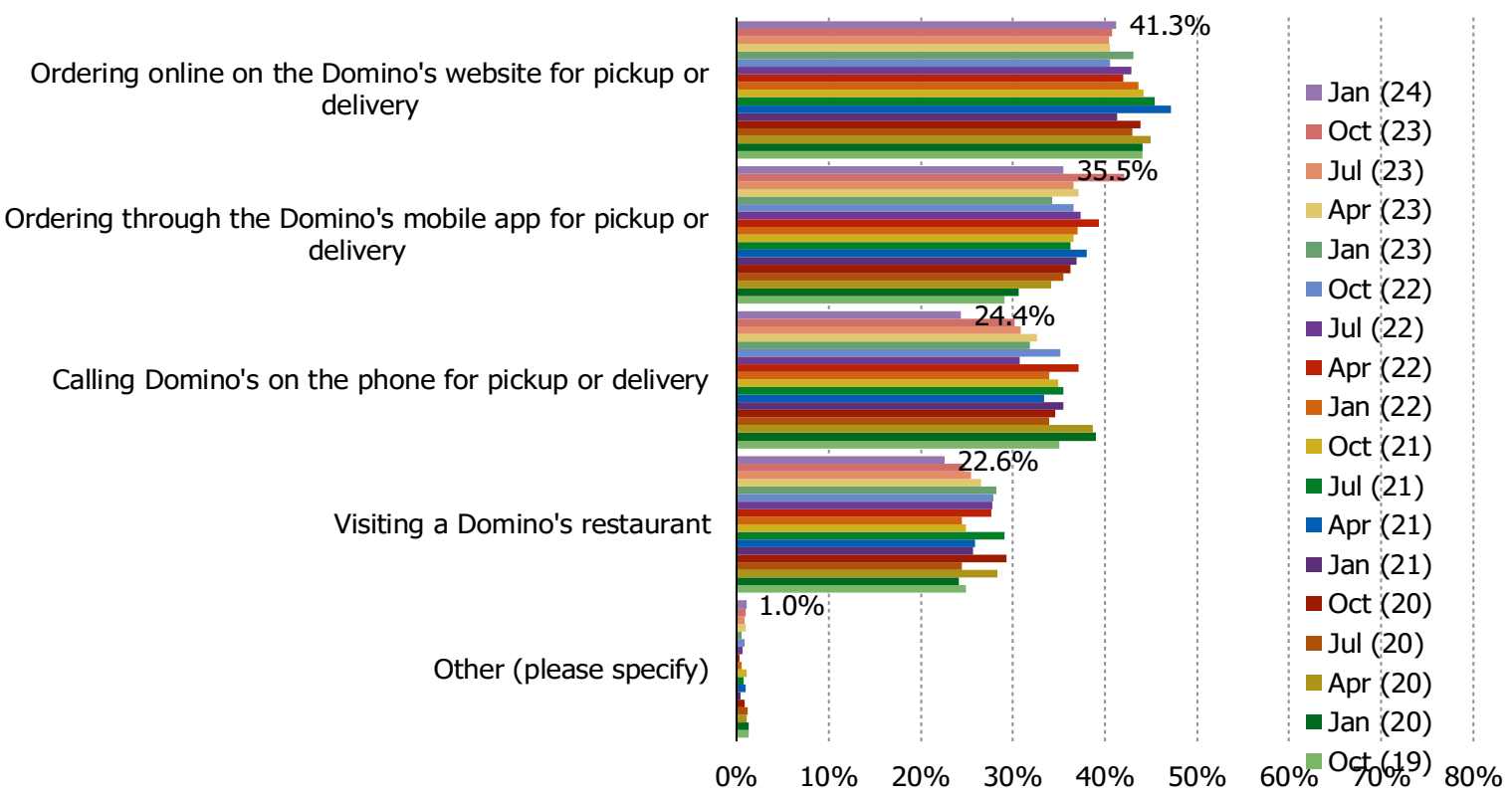
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HOW DO YOU TYPICALLY GET DOMINO'S?

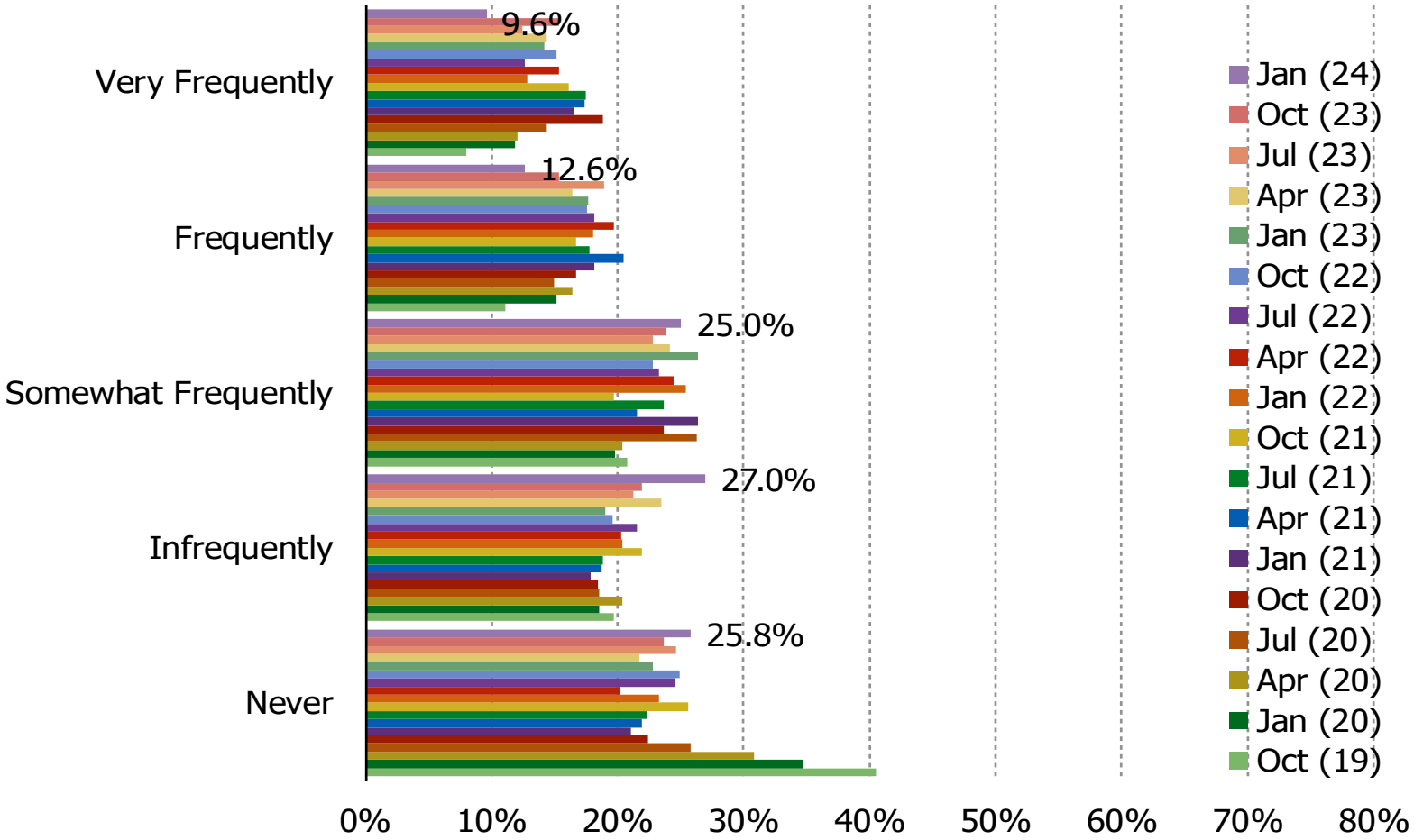
Posed to respondents who have eaten Domino's in the past year.



PIZZA

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

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

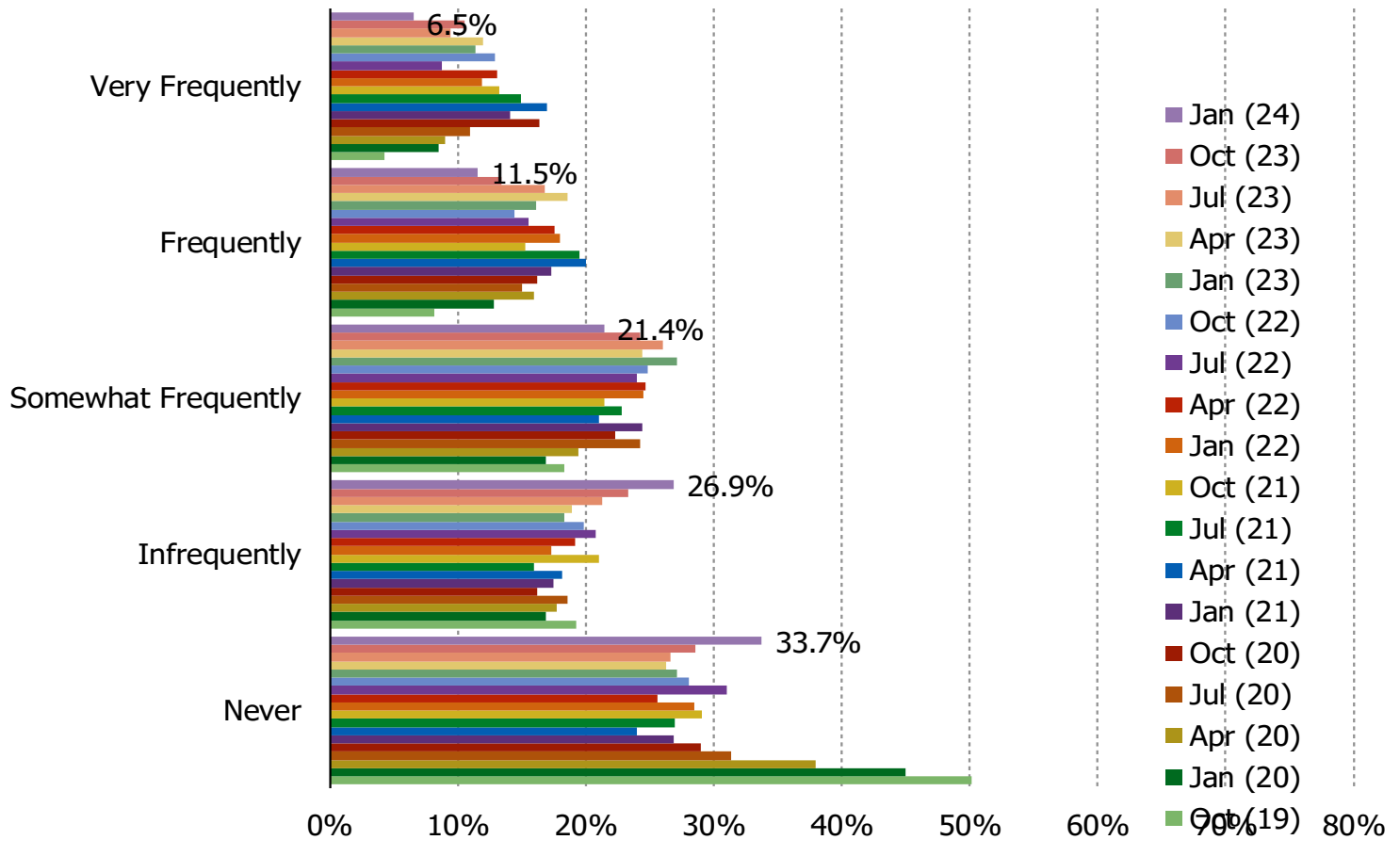


THIRD PARTY FOOD DELIVERY APPS VS. DPZ

PIZZA

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

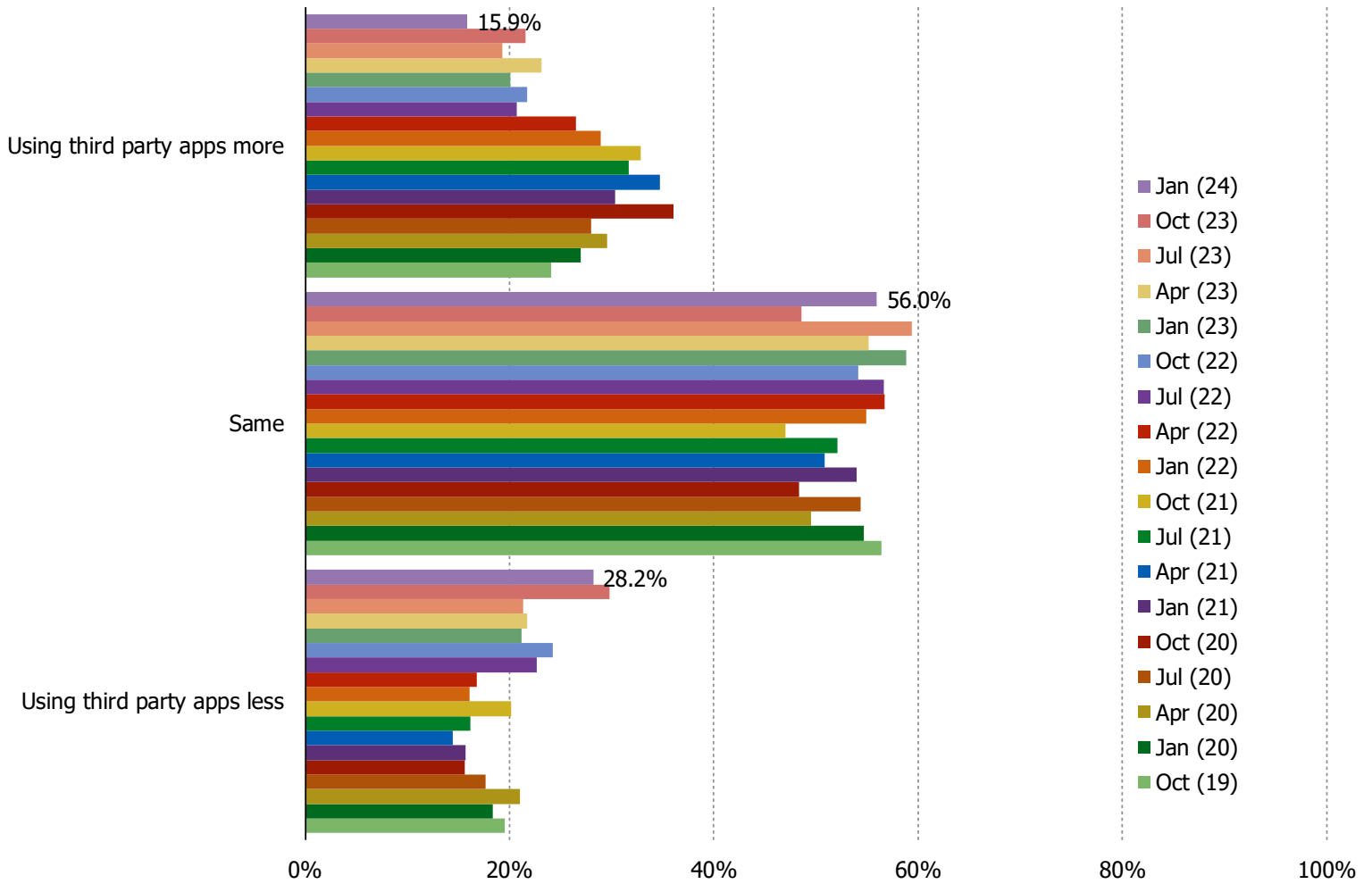
Posed to respondents who have eaten Domino's in the past year.



PIZZA

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

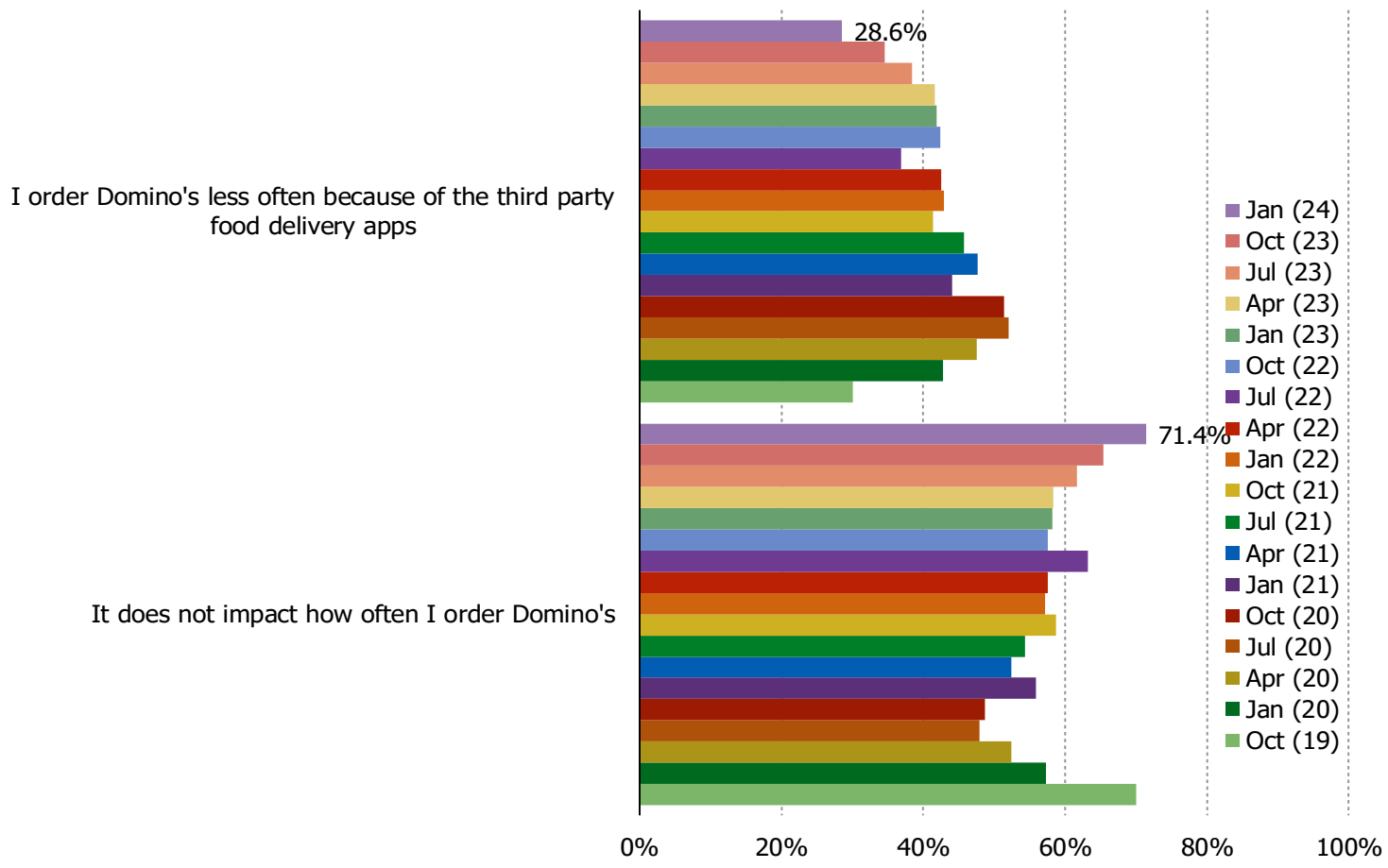
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



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?

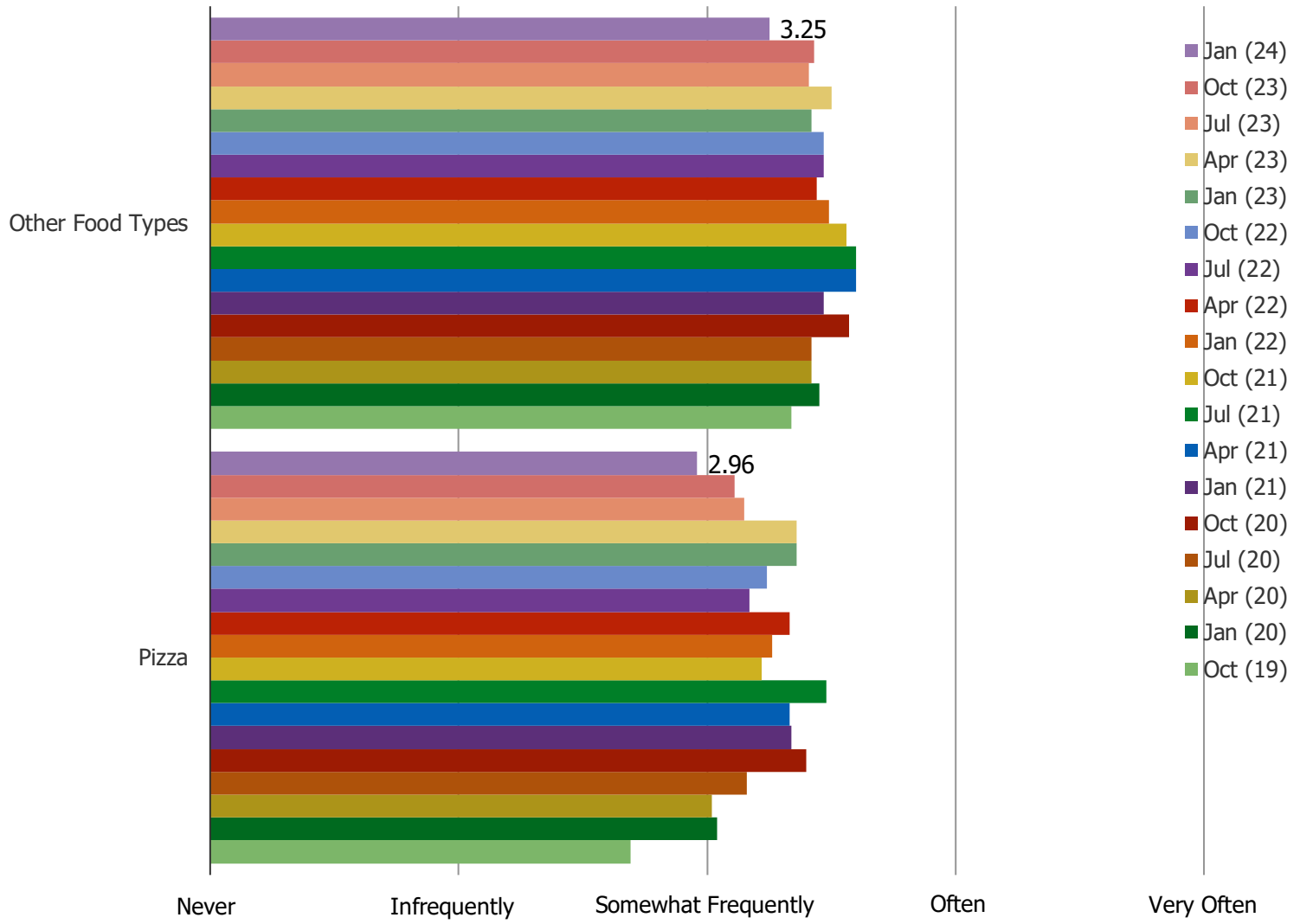
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

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

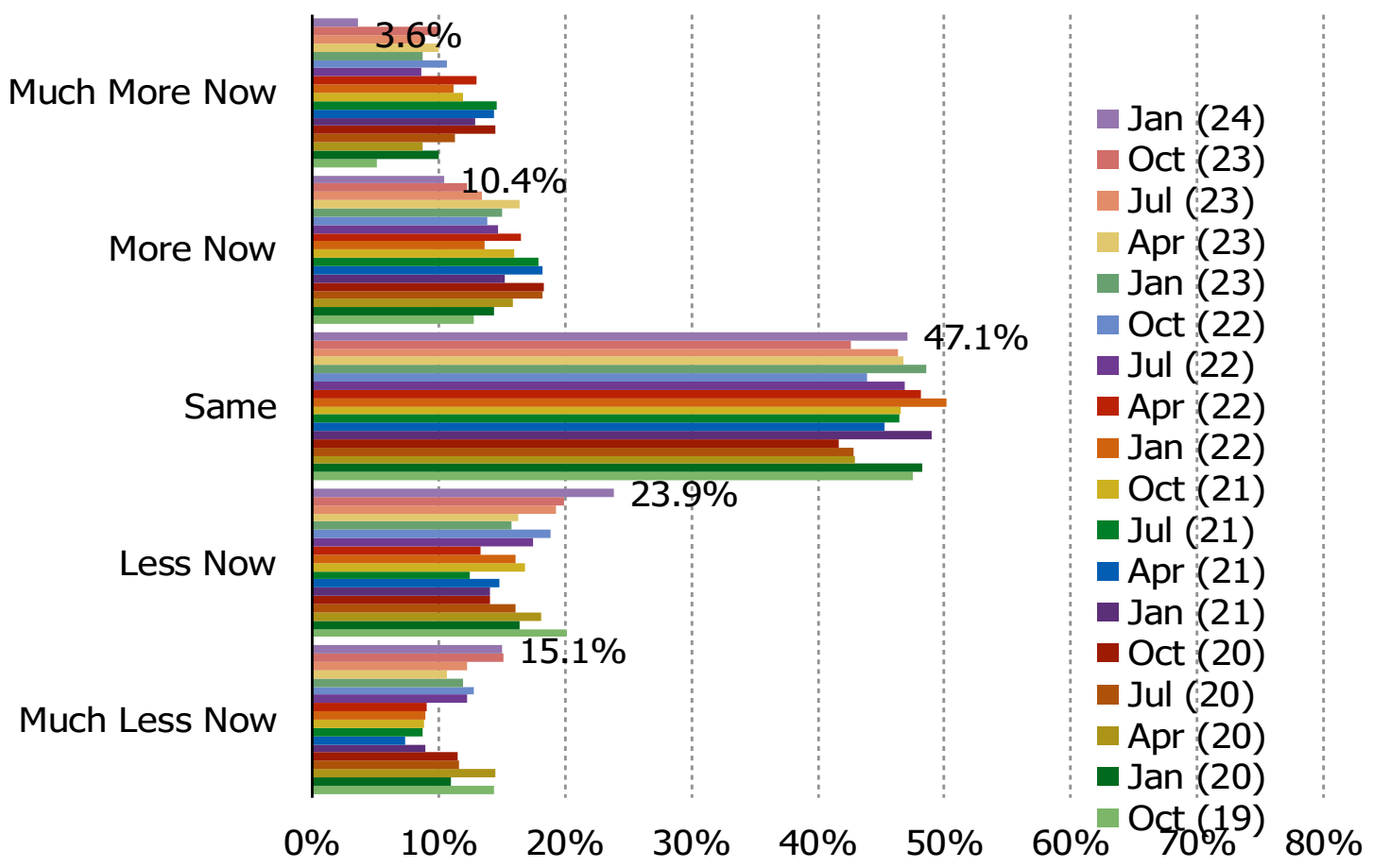
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

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

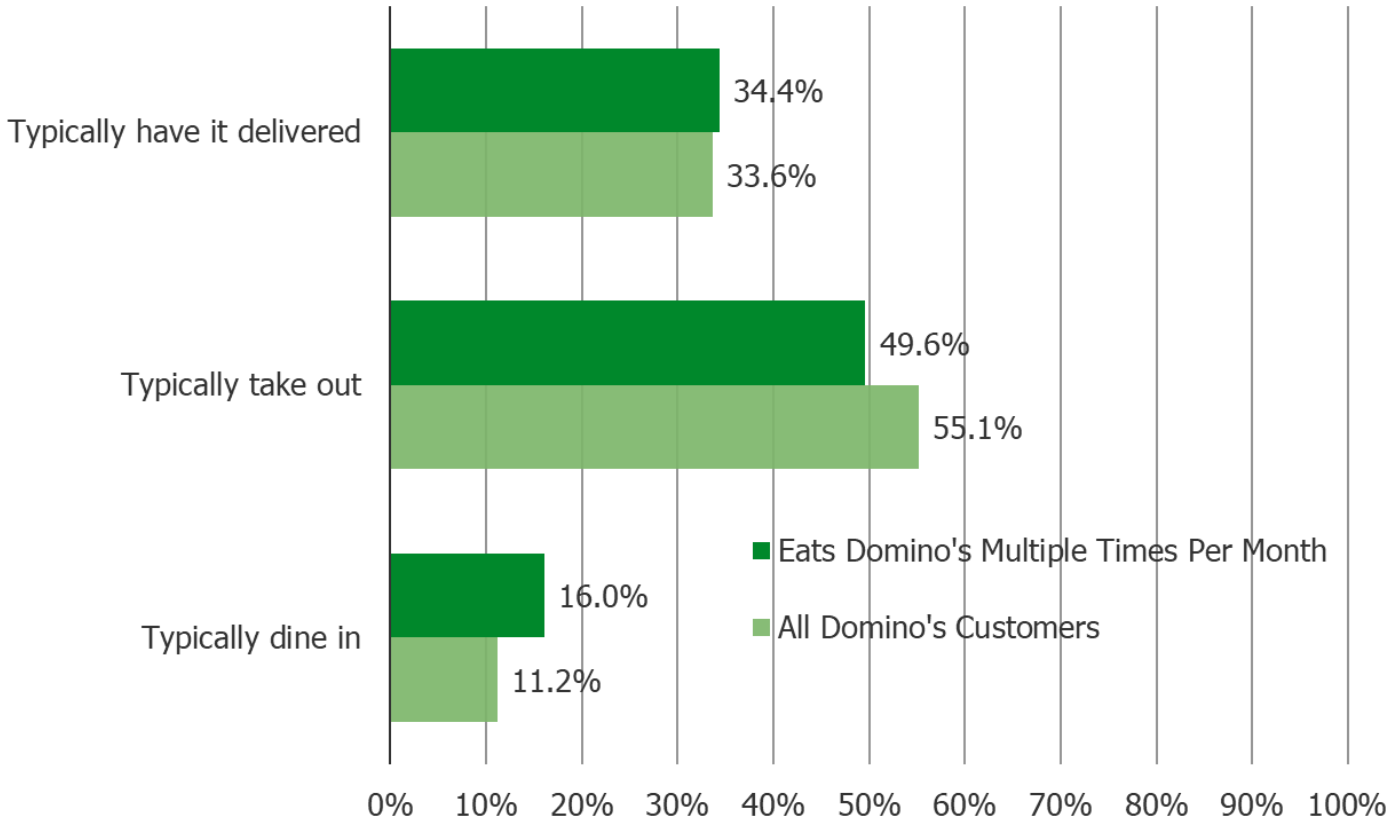
Posed to respondents who have eaten Domino's in the past year.



FROM OUR JULY 2023 WAVE

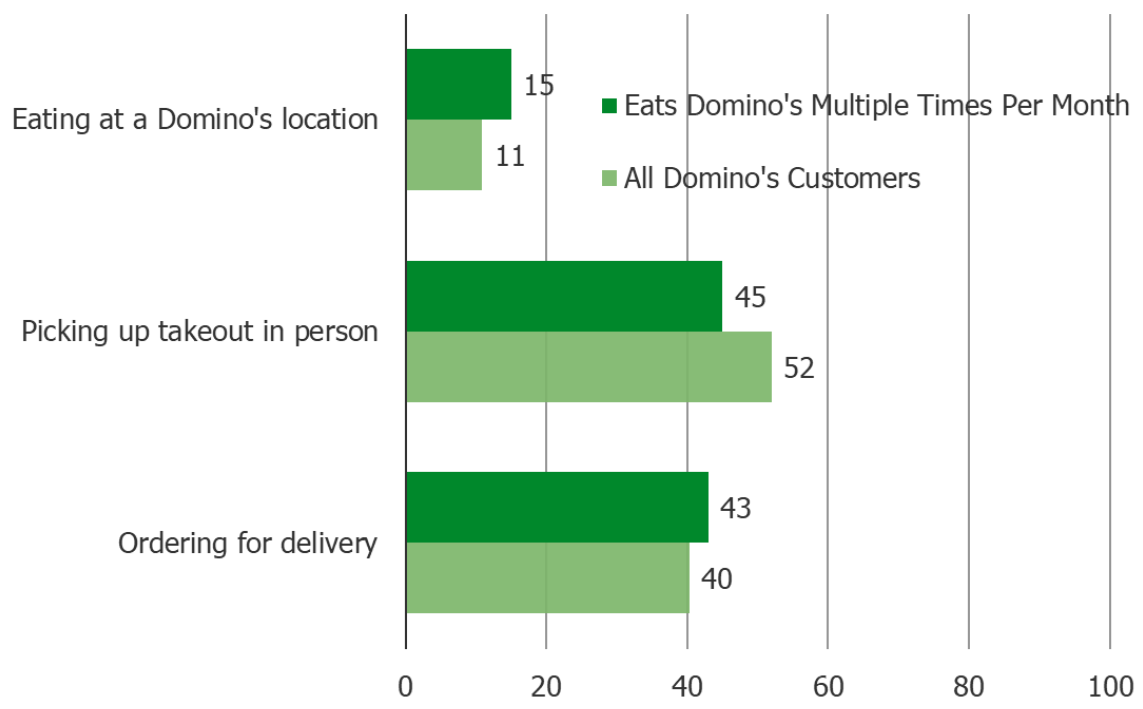
WHEN YOU GET DOMINO'S, DO YOU TYPICALLY DINE IN, TAKE OUT, OR HAVE IT DELIVERED?

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



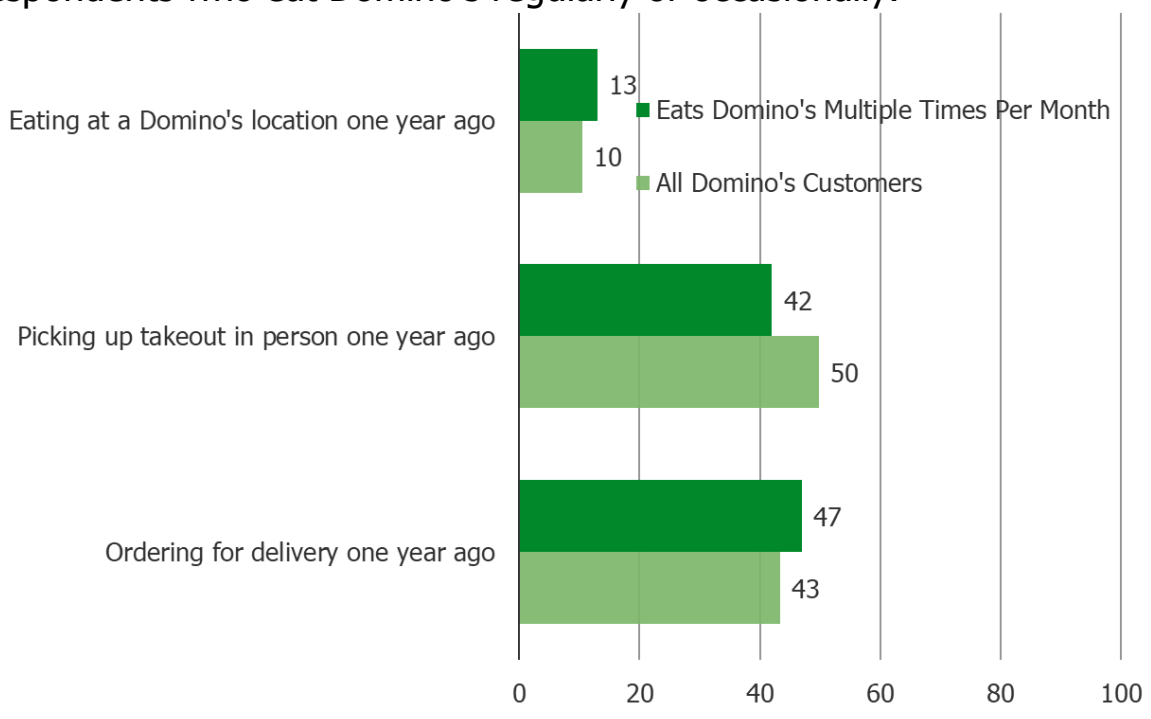
WHAT PERCENTAGE OF THE TIMES YOU HAVE DOMINO'S DO YOU GET IT IN THE FOLLOWING WAYS?

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



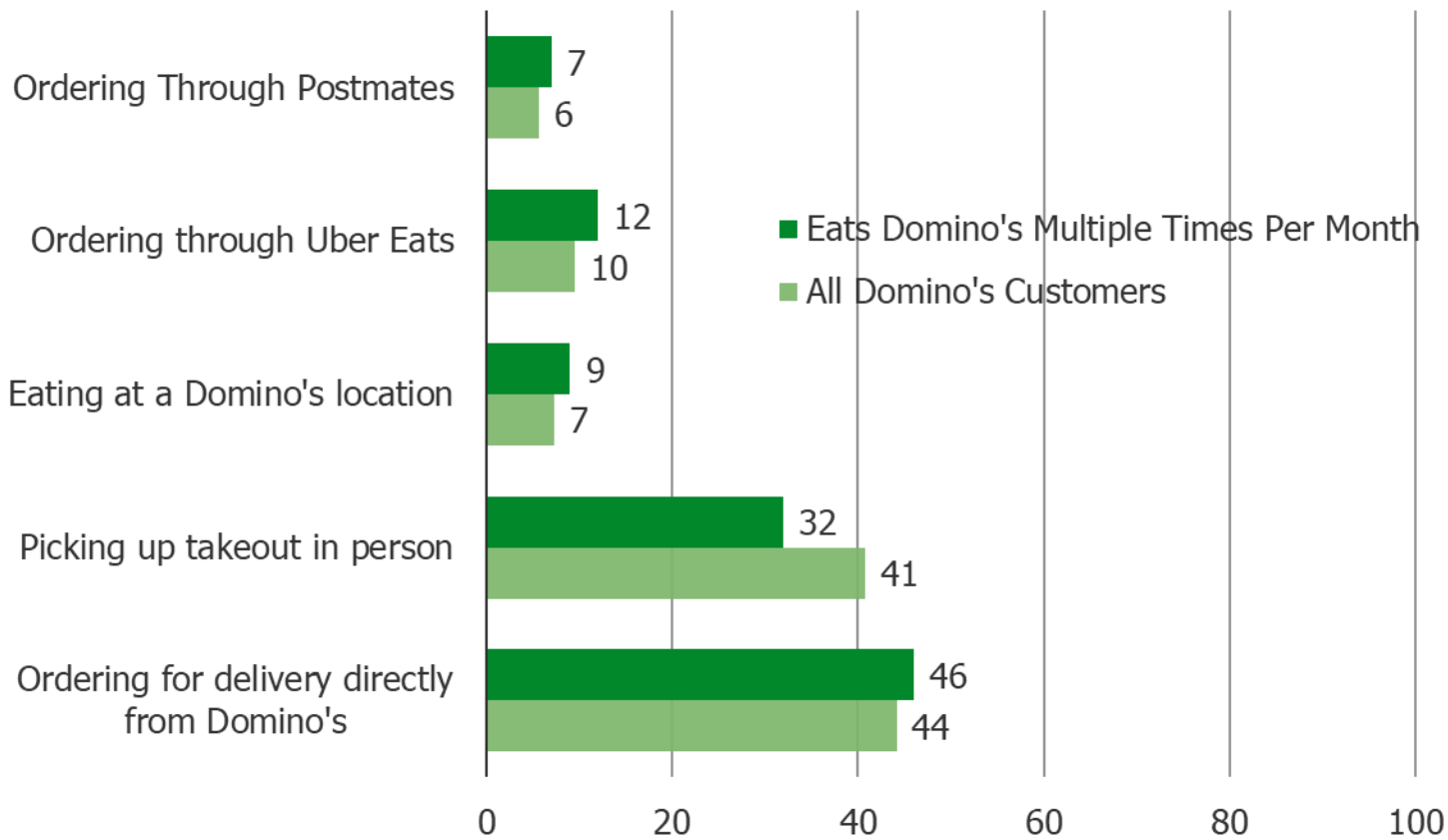
IF WE ASKED YOU THIS QUESTION ONE YEAR AGO, WHAT WOULD YOU HAVE SAID? WHAT PERCENTAGE OF THE TIMES YOU HAVE DOMINO'S DO YOU GET IT IN THE FOLLOWING WAYS?

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



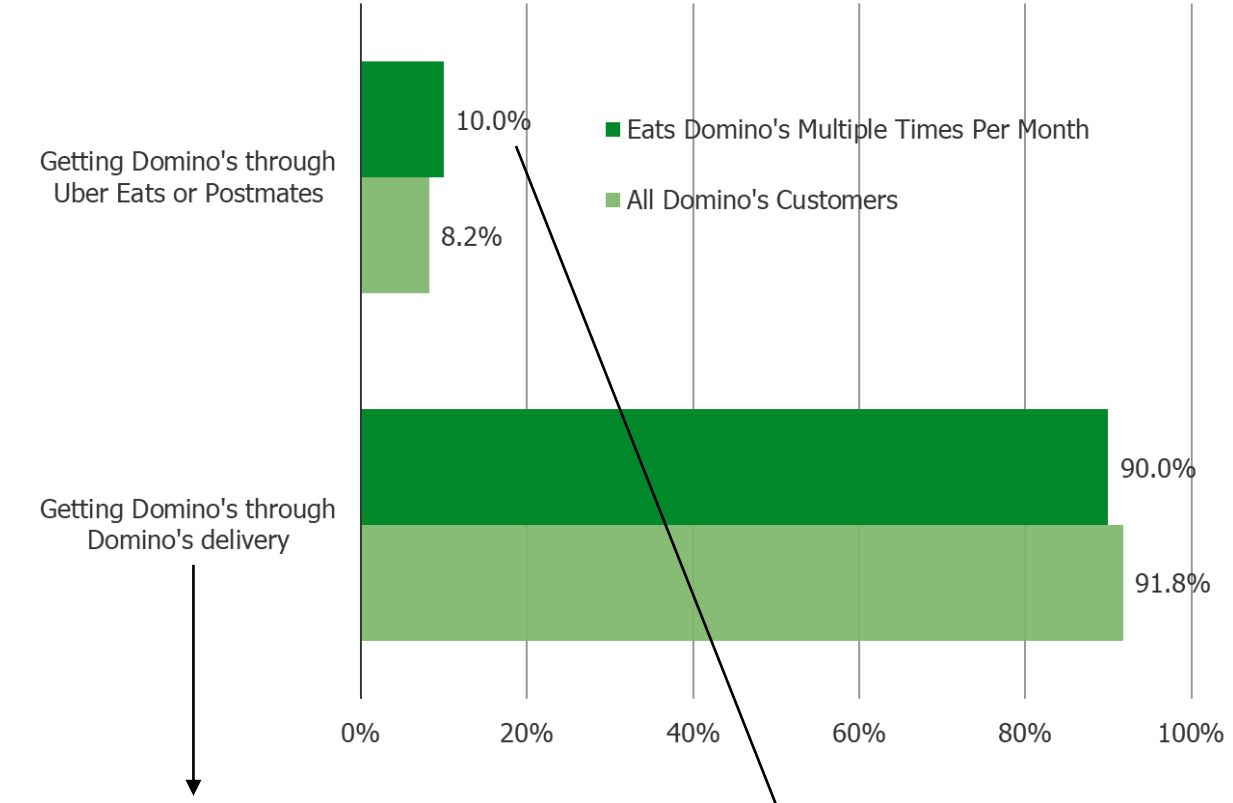
IF DOMINO'S WAS AVAILABLE ON UBER EATS OR POSTMATES, WHAT PERCENTAGE OF YOUR DOMINO'S ORDERS WOULD BE MADE THE FOLLOWING WAYS...

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.

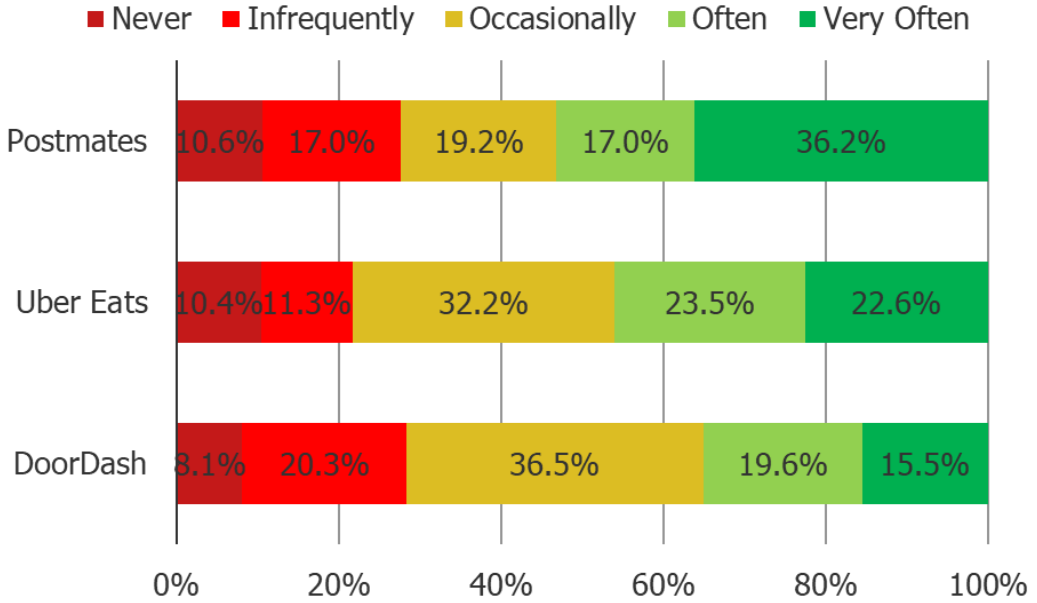


use uber fees less time cost less
 directly cheaper Domino's
 food better delivery
 delivery services

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.

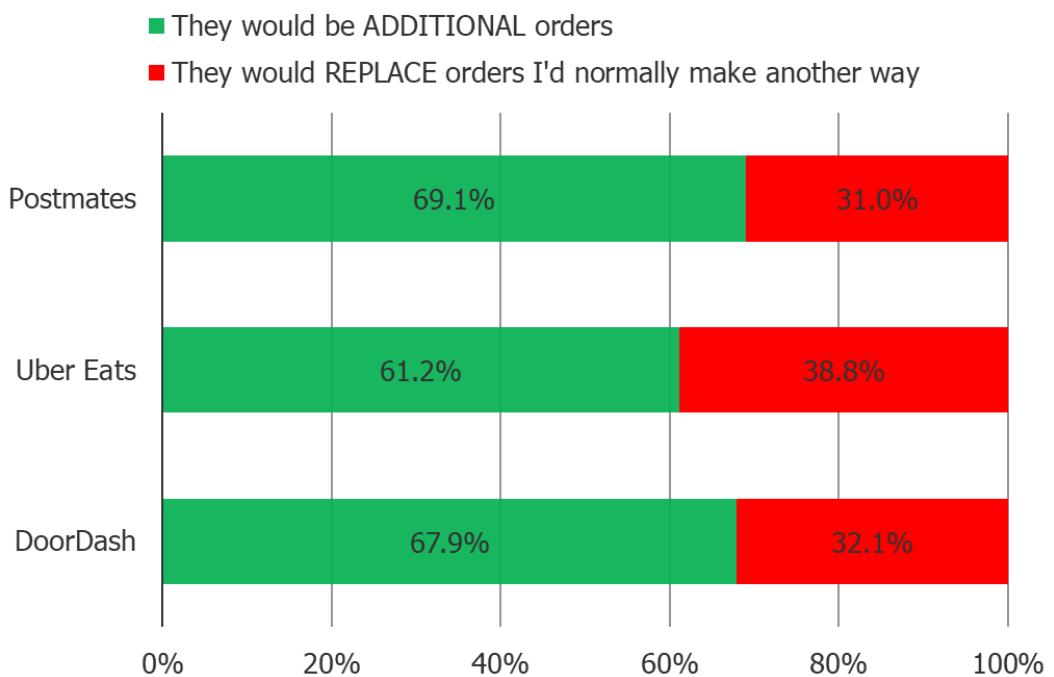
IF YOU CAME ACROSS DOMINO'S ON THE FOLLOWING APP(S), HOW OFTEN DO YOU THINK YOU WOULD ORDER FROM THERE THROUGH THIS APP?

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.

