

Bespoke Survey Research

January 2024

Food Delivery

Volume 30 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: UBER, DASH, GRUB, CART.

Key Takeaways:

- ❑ The share of consumers who view food delivery platforms as a necessity continue to decline.
- ❑ Food delivery app usage has declined q/q and usage frequency among those who use food delivery softened sequentially in our survey.
- ❑ Among those who are using food delivery apps less frequently, the top reasons for reducing usage are nearly all related to costs and spending concerns.
- ❑ DoorDash continues to be the top app that consumers use regularly or occasionally when ordering takeout food delivery.
- ❑ Consumers who use both apps continue to prefer DoorDash over Uber Eats.
- ❑ DoorDash has gained share in our survey across historical waves (ie, an increasing share of users of the competition are also using DoorDash and a declining share of DoorDash users are also using the competition).
- ❑ The share of respondents who use Instacart regularly continues to decline. NPS and sentiment based readings for Instacart softened sequentially in our survey.

Noteworthy Stats:

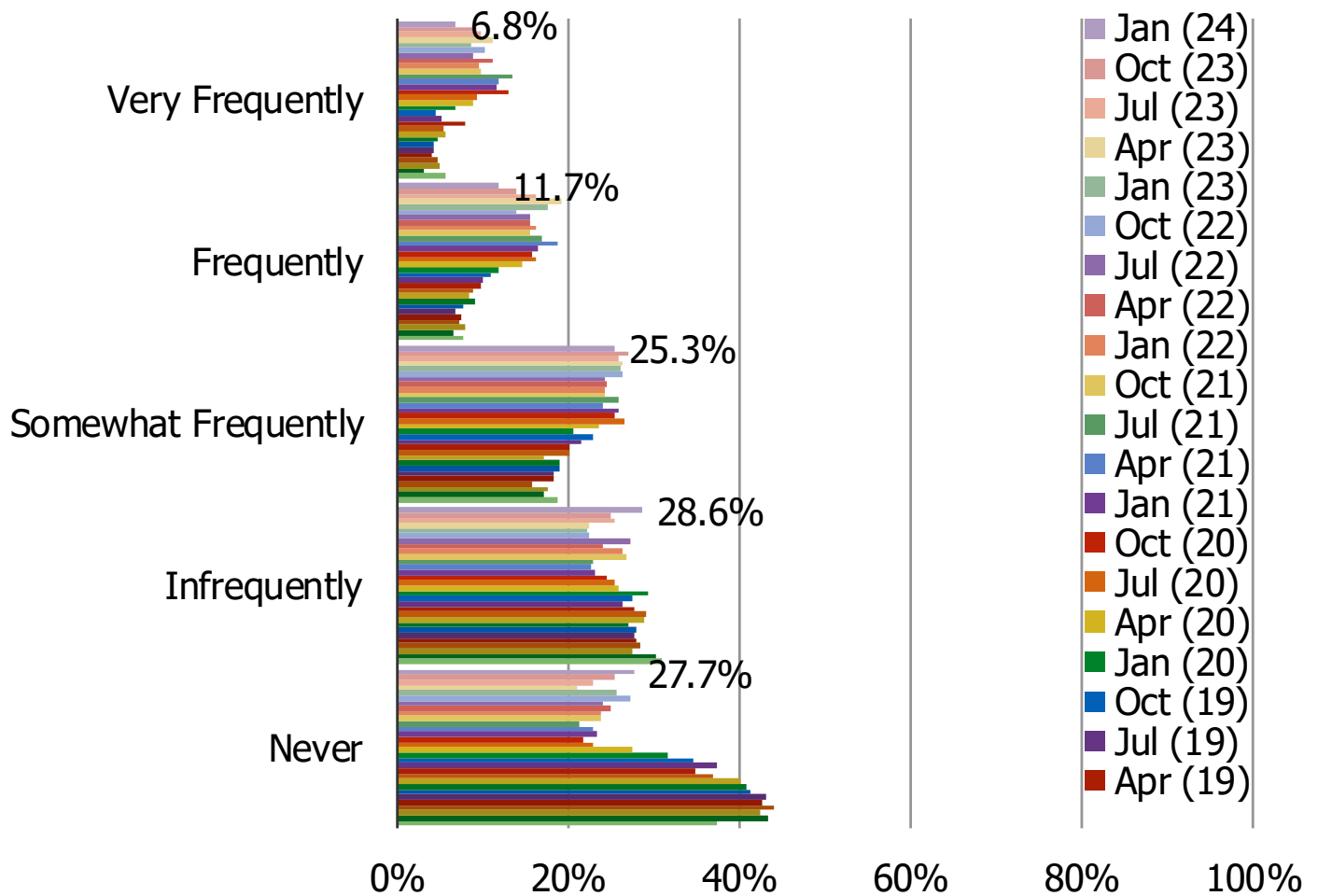
- 18.5%** Of respondents order food through websites online or through apps either frequently or very frequently.
- 34.4%** Of respondents who use food delivery apps use Uber Eats regularly or occasionally.
- 59.3%** Of respondents who use both Uber Eats and DoorDash would choose DoorDash if they could only use one.

Food Delivery Apps

FOOD DELIVERY

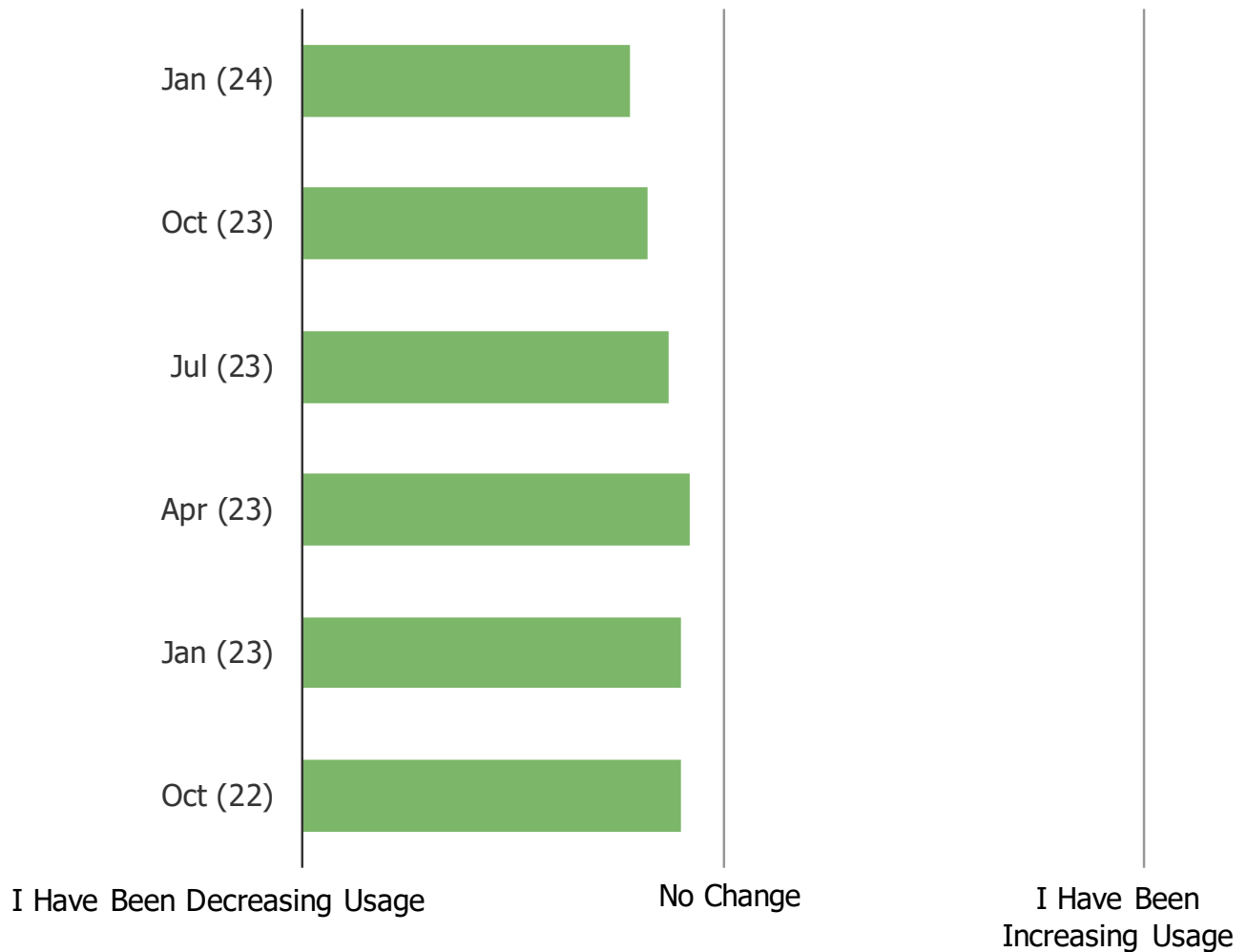
HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



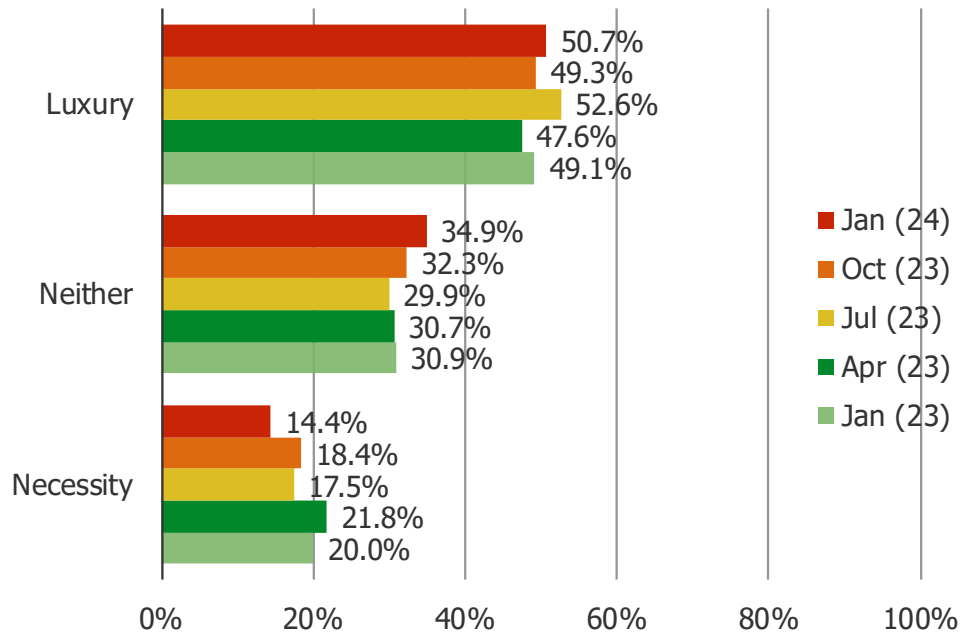
HAVE YOU RECENTLY BEEN CHANGING HOW OFTEN YOU USE FOOD DELIVERY APPS?

Posed to respondents who use food delivery apps.



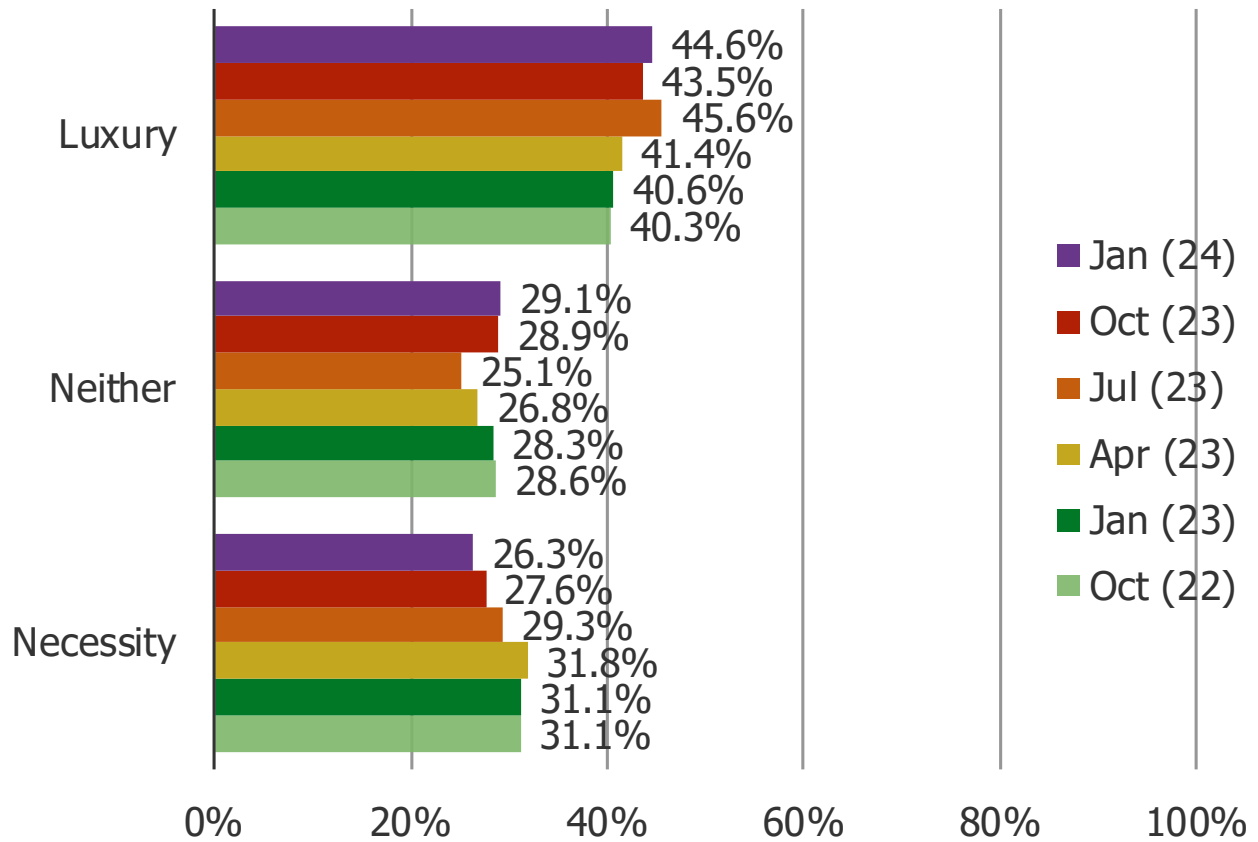
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.



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

Posed to all respondents.



WHY HAVE YOU BEEN USING FOOD DELIVERY APPS LESS?

Posed to respondents who use food delivery apps and said they have been using it less.

1. **Cost / Expensive / High Prices:**

- Too expensive / Expensive: 23 mentions
- The prices are too high: 2 mentions
- It's too expensive now: 2 mentions
- Really expensive: 1 mention
- Raised prices: 1 mention
- It gets expensive: 1 mention
- Prices are too high: 2 mentions
- Prices have sky rocketed: 1 mention
- Prices and delivery fees are high: 1 mention
- Everything is expensive: 1 mention
- Everything too high: 1 mention
- Because of inflation in grocery prices: 1 mention
- Price basically doubles for delivery: 1 mention
-

Total: 39 mentions

2. **Budgeting / Saving Money:**

- Budgeting more: 1 mention
- Our budget is getting really tight: 1 mention
- Decreasing eating out: 1 mention
- Saving money: 2 mentions
- Money: 1 mention
- Too much money: 1 mention
- Less disposable income: 1 mention
- Trying to save money: 2 mentions
- Cutting down on money spending: 1 mention
- Need to save money this year: 1 mention
- No money: 1 mention
- I am living on a budget as a full-time student: 1 mention
- Too expensive, need to cut expenses: 1 mention
- Do to financial situations our budget is limited right now: 1 mention
- I slowed down on ordering food just to save money: 1 mention

Total: 17 mentions

WHY HAVE YOU BEEN USING FOOD DELIVERY APPS LESS?

Posed to respondents who use food delivery apps and said they have been using it less.

3. Fees and Charges:

- There are too many fees associated with the food delivery apps: 1 mention
- The fees are outrageous: 1 mention
- Delivery charges: 1 mention
- Fees have gotten way too high: 1 mention

Total: 4 mentions

4. Dining Preferences:

- Cooking at home: 2 mentions
- Been going inside restaurant: 1 mention
- Only times I have used food delivery is when food is ordered from restaurants: 1 mention
- Burgers are now over \$10: 1 mention
- Prefer not to use third party apps: 1 mention
- More restaurants are having their own apps: 1 mention
- I have a car: 1 mention
- Trying to eat better: 1 mention
- I go pick up myself: 1 mention
- Usually just order through restaurant website: 1 mention
- Rather go out instead: 1 mention

Total: 11 mentions

5. Personal Circumstances:

- Too broke: 2 mentions
- I'm broke: 1 mention
- Money is tight: 1 mention
- Because there a fucking ripoff and the drivers constantly fuck up the order: 1 mention
- I have a car: 1 mention (also counted in Dining Preferences)
- Health reasons: 1 mention
- It is expensive and I recently had a baby: 1 mention
- I can't afford it: 1 mention

Total: 9 mentions (8 unique to Personal Circumstances)

WHY HAVE YOU BEEN USING FOOD DELIVERY APPS LESS?

Posed to respondents who use food delivery apps and said they have been using it less.

6. **Service Issues:**

- Don't have my local restaurant: 1 mention
- Cost and untimely delivery: 1 mention

Total: 2 mentions

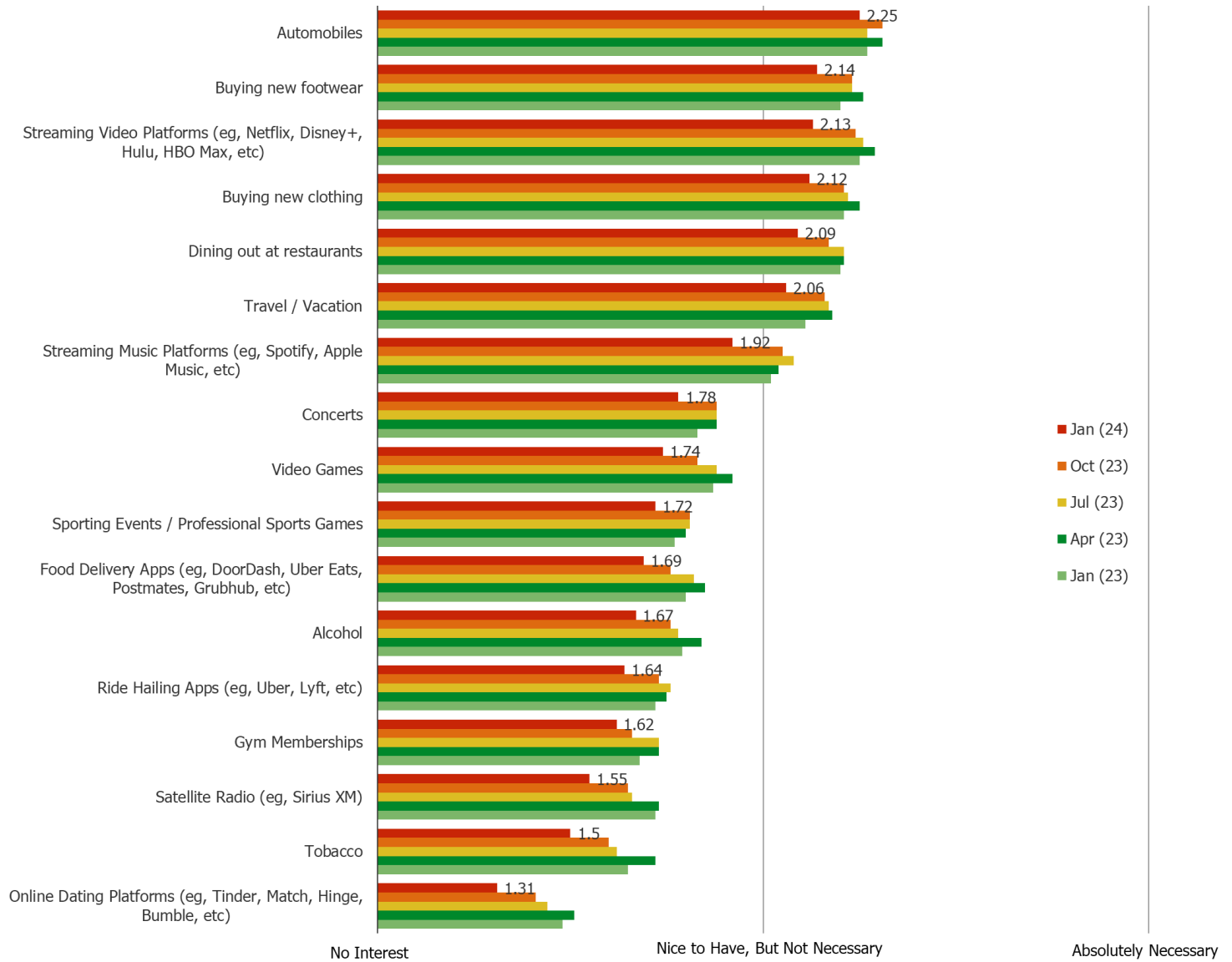
7. **Miscellaneous Reasons:**

- Because it is the best if you ask me: 1 mention
- I don't use delivery services: 1 mention
- Eating out less, economy: 1 mention
- Waste of money: 1 mention

Total: 4 mentions

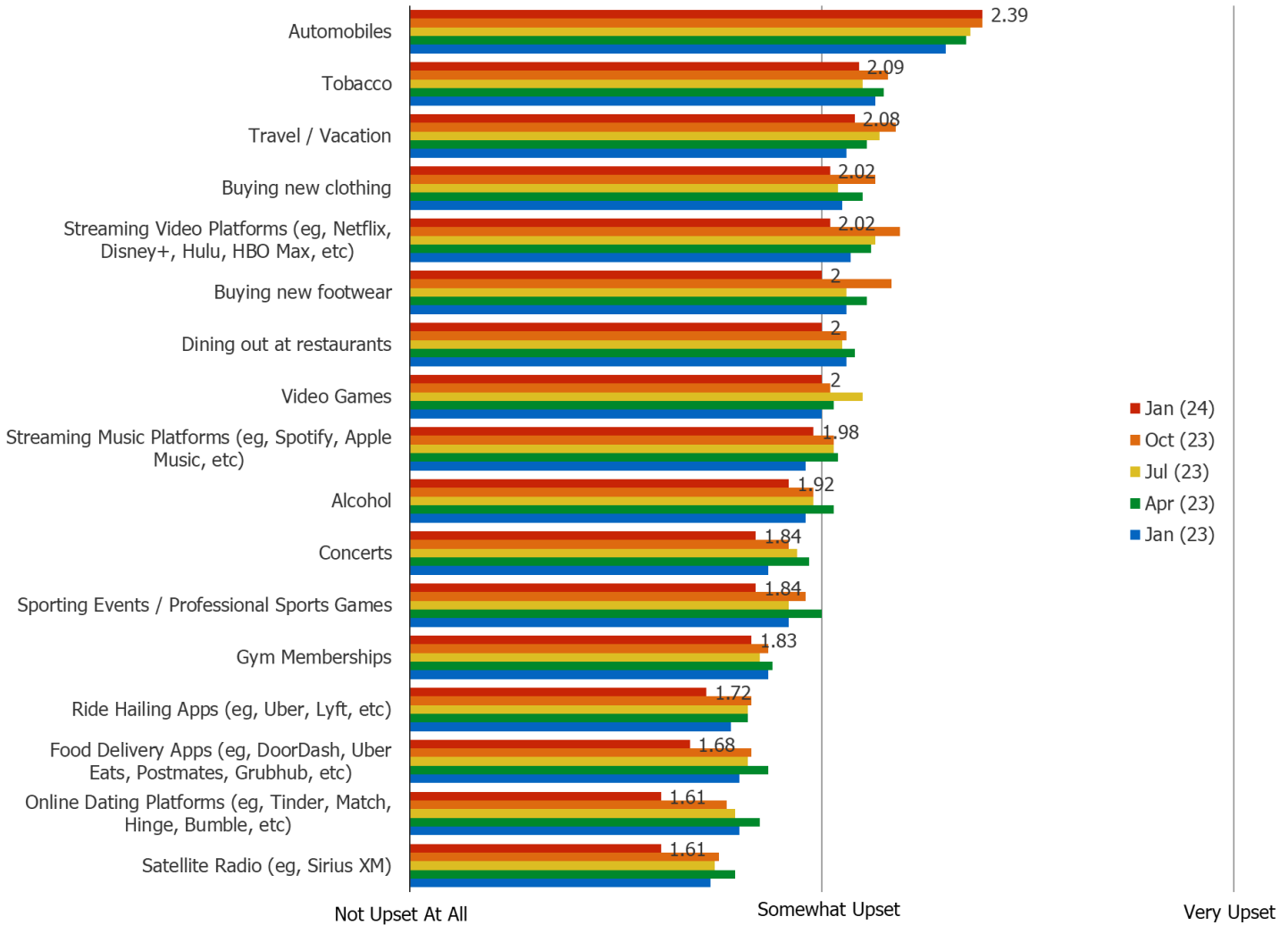
WHAT IS YOUR OPINION OF SPENDING MONEY ON THE FOLLOWING...

Posed to all respondents (N = 1250)



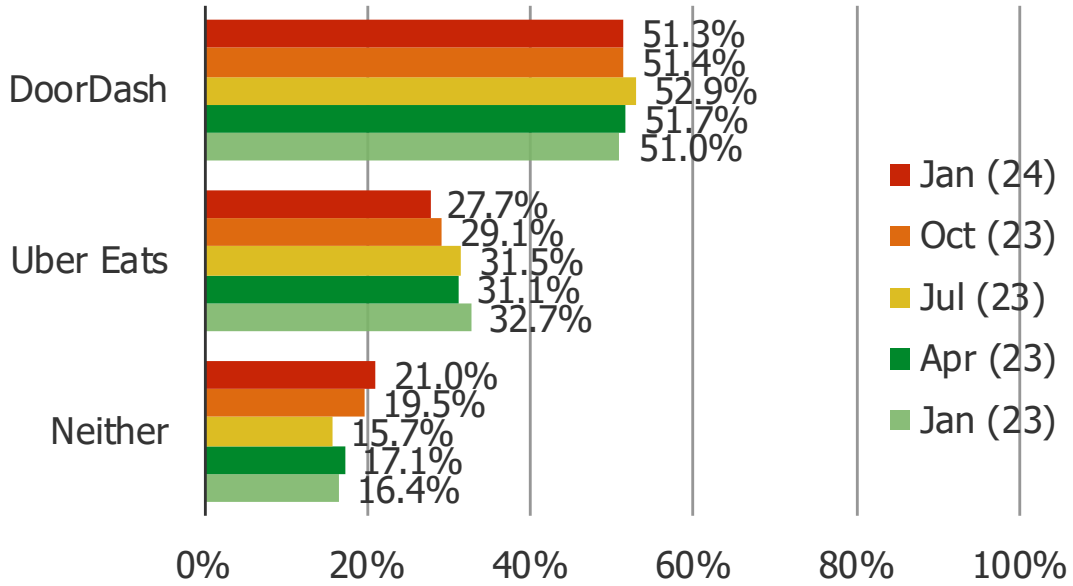
HOW UPSET WOULD YOU BE IF YOU LOST ACCESS TO THE FOLLOWING?

Posed to all respondents (N = 1250)

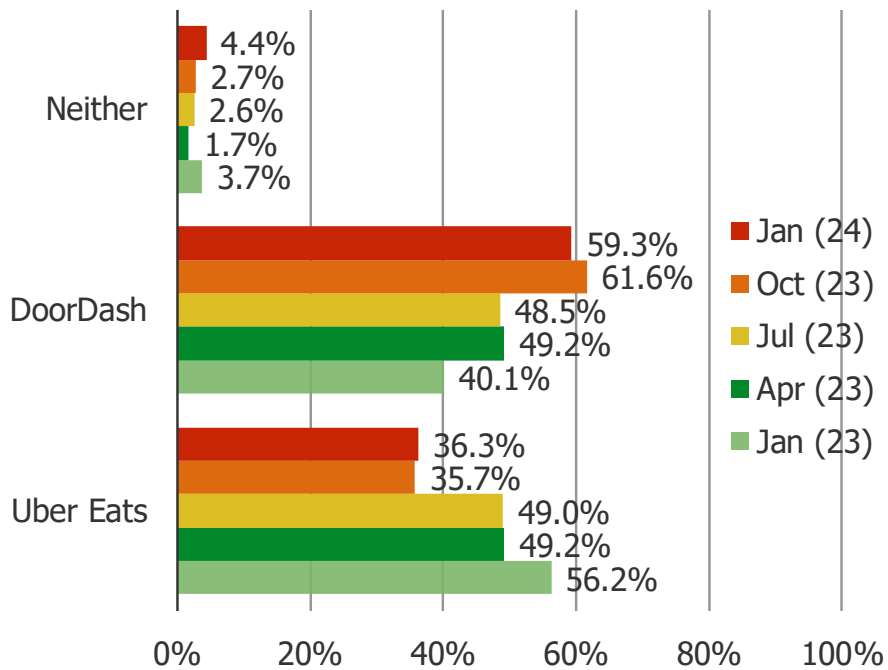


IF YOU HAD TO CHOOSE ONLY ONE OF THESE TO USE, WHICH WOULD YOU PICK?

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 DoorDash**

1. Cheaper Prices/Lower Fees:

- Prices are cheaper: 10 mentions
- The cheapest fees: 2 mentions
- Cheaper: 3 mentions
- It's a better value: 1 mention
- Because of it inexpensive: 1 mention
- Cheapest and good tracking: 1 mention
- Probably cheaper: 1 mention
- Cheaper rates: 1 mention

Total: 20 mentions

2. Familiarity/Experience with Service:

- I have the most experience with it: 1 mention
- Know the app very well: 1 mention
- Because they are used most often: 1 mention
- Most familiar: 1 mention
- More familiar to me: 1 mention
- I'm most familiar with it: 1 mention
- Use the most so very familiar: 1 mention
- I'm the most familiar with it: 1 mention

Total: 8 mentions

3. User-Friendly Interface/Ease of Use:

- It's easiest to use: 1 mention
- More user friendly, the interface looks nicer: 1 mention
- Easy to use, tracking option: 1 mention
- Better experience: 1 mention
- Easier to use and cheaper: 1 mention
- Easy-to-use: 1 mention
- It's quick and easy and safe: 1 mention
- There application user interface is fantastic: 1 mention

Total: 8 mentions

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH **who prefer DoorDash**

4. Restaurant Selection:

- It has more restaurants that appeal to us: 1 mention
- Better selection and experience: 1 mention
- Best selection of restaurants: 1 mention
- It offers a wide variety of restaurants and cuisines to choose from: 1 mention
- More restaurants: 1 mention
- They have the restaurants that I enjoy: 1 mention
- They have more restaurants available compared to others: 1 mention
- DoorDash has a better selection of restaurants I can order food from in my area: 1 mention

Total: 8 mentions

5. Good/Better Service:

- Good service: 1 mention
- BETTER SERVICE: 1 mention
- Great service: 1 mention
- Better: 2 mentions
- Has the best service: 1 mention
- Better delivery rates: 1 mention
- Awesome service: 1 mention
- Better prices and service: 1 mention
- Good and interesting and entertaining: 1 mention

Total: 10 mentions

6. Reliability/Trustworthiness:

- They are fast. Never had any problems: 1 mention
- Because they are very much reliable and trustworthy: 2 mentions
- Reliability: 1 mention
- Reliable: 2 mentions
- They are the most reliable: 1 mention
- Seems more popular/more reliable: 1 mention

Total: 8 mentions

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH **who prefer DoorDash**

7. **Promotions/Coupons/Discounts:**

- Right now they've had the most coupons: 1 mention
- Discount through Amazon Prime: 1 mention
- I get free delivery fees: 1 mention
- Because the fees aren't as high: 1 mention
- They have cheaper fees: 1 mention

Total: 5 mentions

8. **Fast Delivery/Speed:**

- Fast, accurate and kind: 1 mention
- It's faster: 1 mention
- Faster delivery: 1 mention
- Because they are quick on their feet: 1 mention
- They have the fastest delivery time: 1 mention

Total: 5 mentions

9. **No Particular Reason/General Preference:**

- nothing in particular: 1 mention
- They're the same: 1 mention
- I like it best: 1 mention
- love: 1 mention
- It's ok: 1 mention
- None: 2 mentions
- I like: 2 mentions
- Because it is better: 1 mention
- No reason: 1 mention
- Nothing in particular is a good thing: 1 mention

Total: 12 mentions

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH **who prefer Uber Eats**

1. **Faster Delivery / Speed:**

- They deliver the fastest: 1 mention
- It's fast delivery: 1 mention
- Because it's faster and good: 1 mention
- They're faster: 1 mention
- The delivery time is faster: 1 mention
- It's the fastest service I've used: 1 mention
- Very fast delivery and take care of your food: 1 mention
- They are quick inexpensive and very punctual: 1 mention

Total: 8 mentions

2. **Better Deals / Promotions / Discounts:**

- Great deals and offers every day that change regularly: 1 mention
- Better deals: 1 mention
- Promotions: 1 mention
- Their promo codes: 1 mention
- Uber eats got me with a 30 dollar free meal promo: 1 mention
- Cheaper and fast: 1 mention
- Better rewards program: 1 mention
- Better choices and cheaper fees: 1 mention

Total: 8 mentions

3. **Service Quality:**

- Great UI and transparency: 1 mention
- Their drivers are also much more professional and efficient: 1 mention
- Service: 1 mention
- Better service: 2 mentions
- Good: 2 mentions
- Good service: 2 mentions
- They have better service: 1 mention

Total: 10 mentions

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH **who prefer Uber Eats**

4. **Reliability / Trustworthiness:**

- Because they are very much reliable and trustworthy: 2 mentions
- Most comfortable, best overall selection of restaurants: 1 mention
- It's very good and awesome: 1 mention
- It is the most accurate and trustworthy: 1 mention
- They are the most reliable: 1 mention
- Because they are so reliable: 1 mention
- It is reliable for me and has good service: 1 mention

Total: 8 mentions

5. **Restaurant Selection / Variety:**

- Because they have the best food selection: 1 mention
- More selection and faster delivery: 1 mention
- More food options: 1 mention
- Most amount of restaurants to choose from: 1 mention
- Uber Eats has more restaurant selections than DoorDash: 1 mention
- They have more selection: 1 mention
- They have a good variety: 1 mention
- Uber Eats has better restaurant options for my household: 1 mention

Total: 8 mentions

6. **User Experience / App Interface:**

- Great UI and transparency: 1 mention (also counted in Service Quality)
- Because I use Ubers and I can track them: 1 mention
- Their app is way better: 1 mention
- It's easy to use and I trusted: 1 mention
- Uber eats I just like the app easy to use: 1 mention
- It offers the most amount of restaurants to choose from: 1 mention (also counted in Restaurant Selection)
- Ease of use: 1 mention

Total: 7 mentions (5 unique to User Experience)

PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH **who prefer Uber Eats**

7. **Pricing / Fees:**

- Lower delivery fees: 1 mention
- It's better the price: 1 mention
- Less expensive, drivers tend be more vocal if delays: 1 mention
- Because the fees aren't as high: 1 mention
- UberEats is cheaper: 1 mention
- Their fees are reasonable: 1 mention
- Better choices and cheaper fees: 1 mention (also counted in Better Deals)

Total: 7 mentions (6 unique to Pricing/Fees)

8. **Personal Preference / Habit:**

- I just like them better: 1 mention
- Because it is so good: 1 mention
- Because that's the one that I prefer: 1 mention
- Because I love it: 1 mention
- I like it: 1 mention
- I have used it longer and it works well for me: 1 mention
- Yes i like: 1 mention

Total: 7 mentions

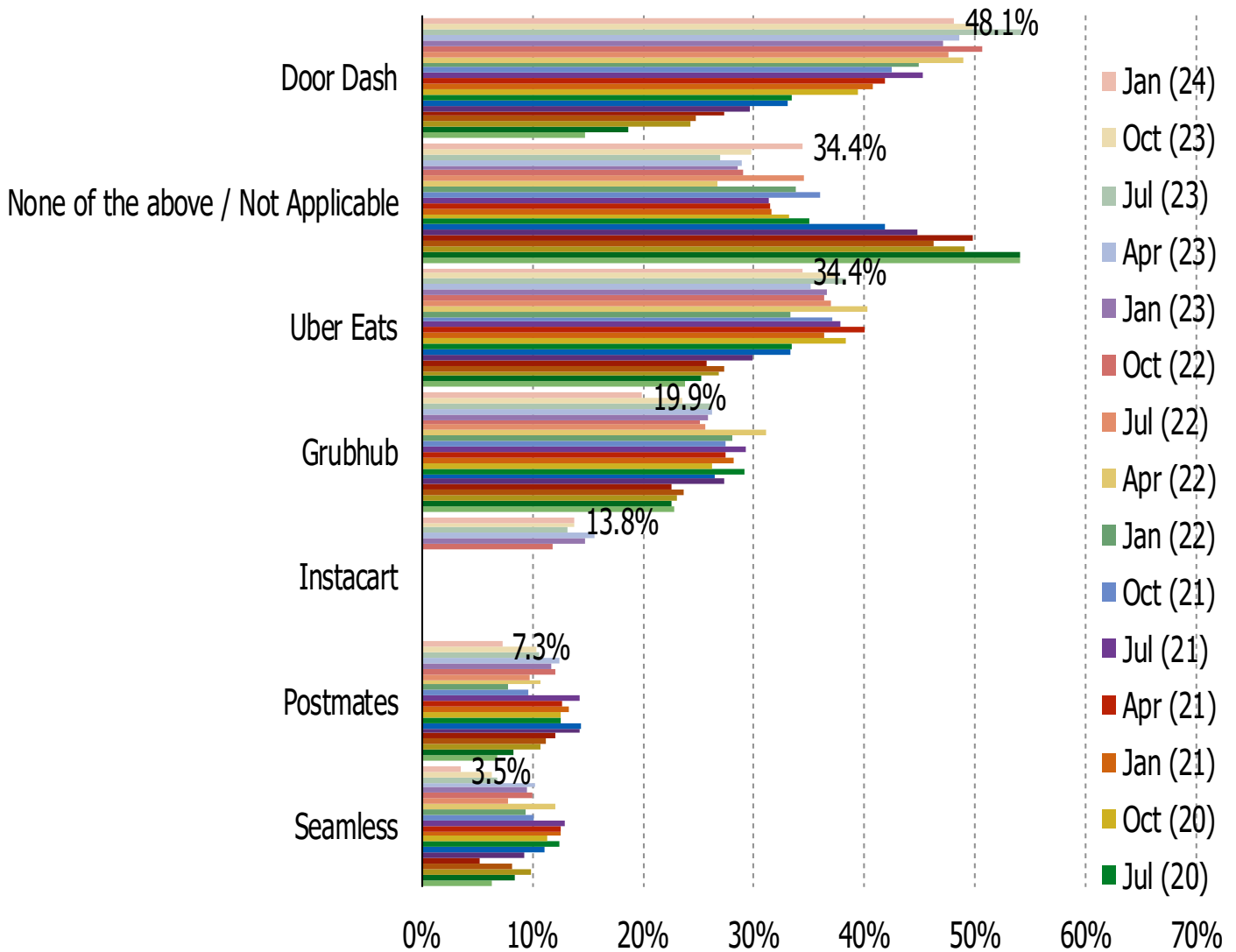
9. **Access to Exclusive Options:**

- You can get access to Costco even if you have no membership: 1 mention
- I got uber eats premium, you get cash back: 1 mention

Total: 2 mentions

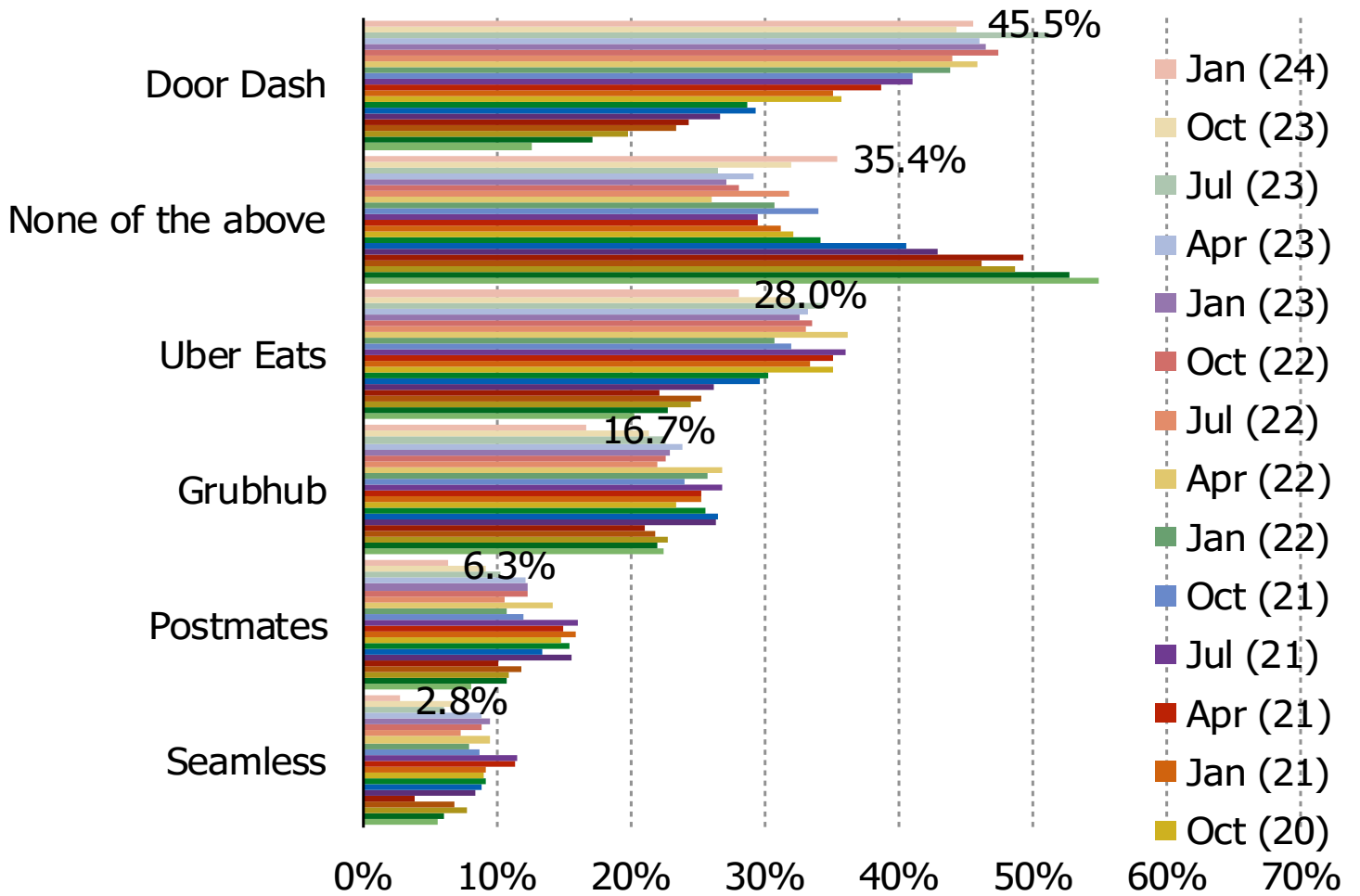
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.



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

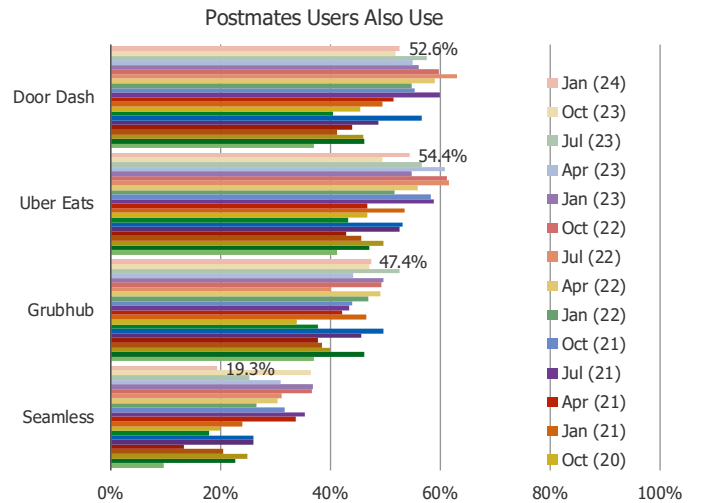
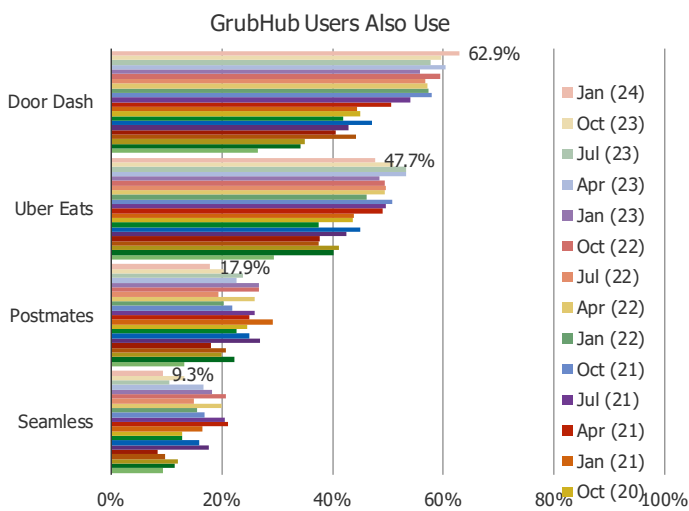
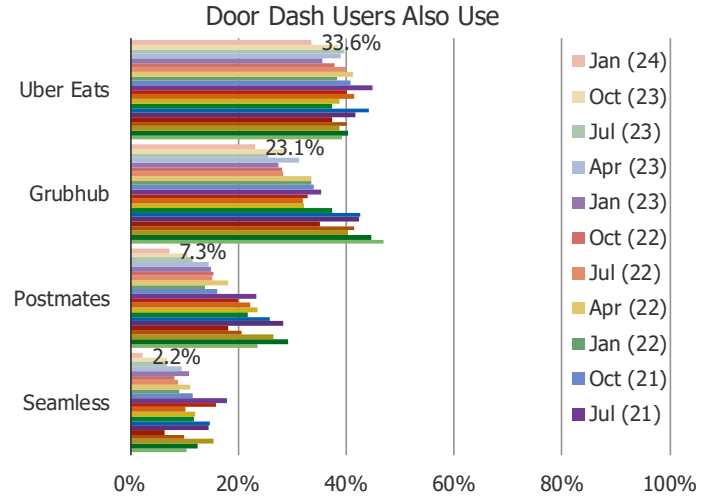
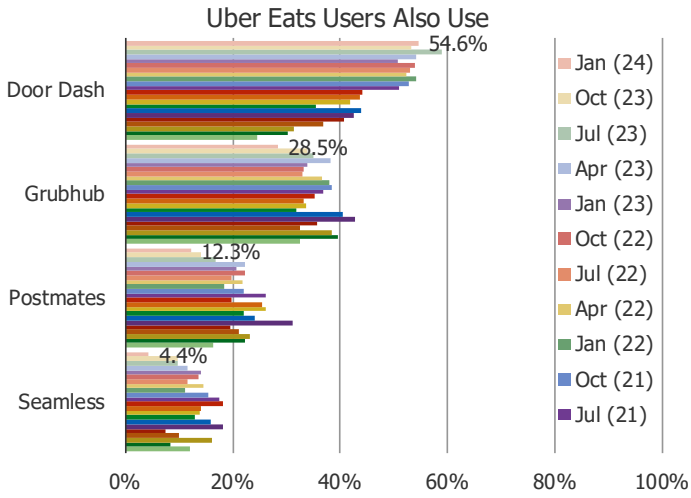
Posed to respondents who use food delivery apps.



N = 904

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

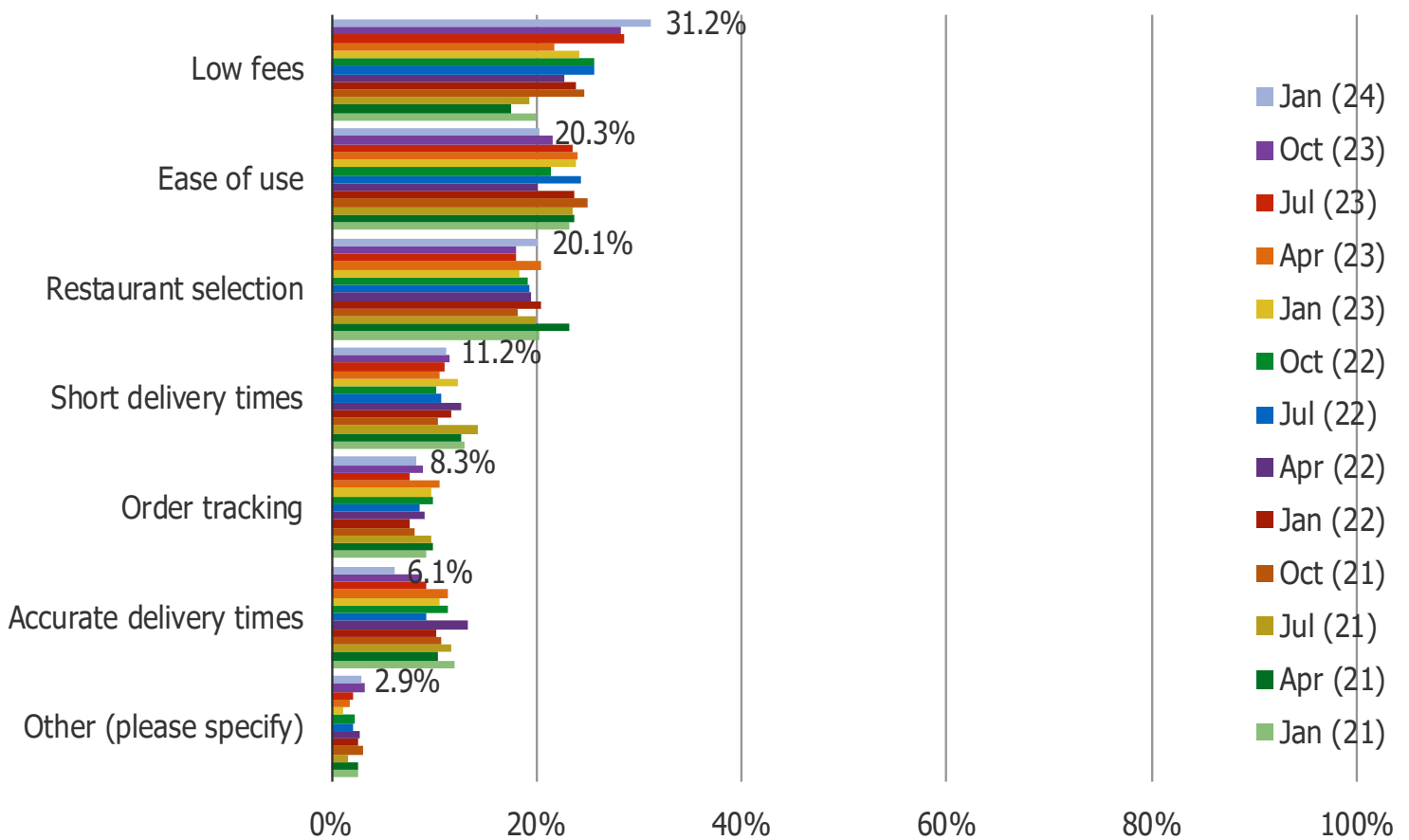
Posed to respondents who use food delivery apps.



	N=
Uber Eats	253
Door Dash	411
Seamless	25
Grubhub	151
Postmates	57
None of the above	320

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

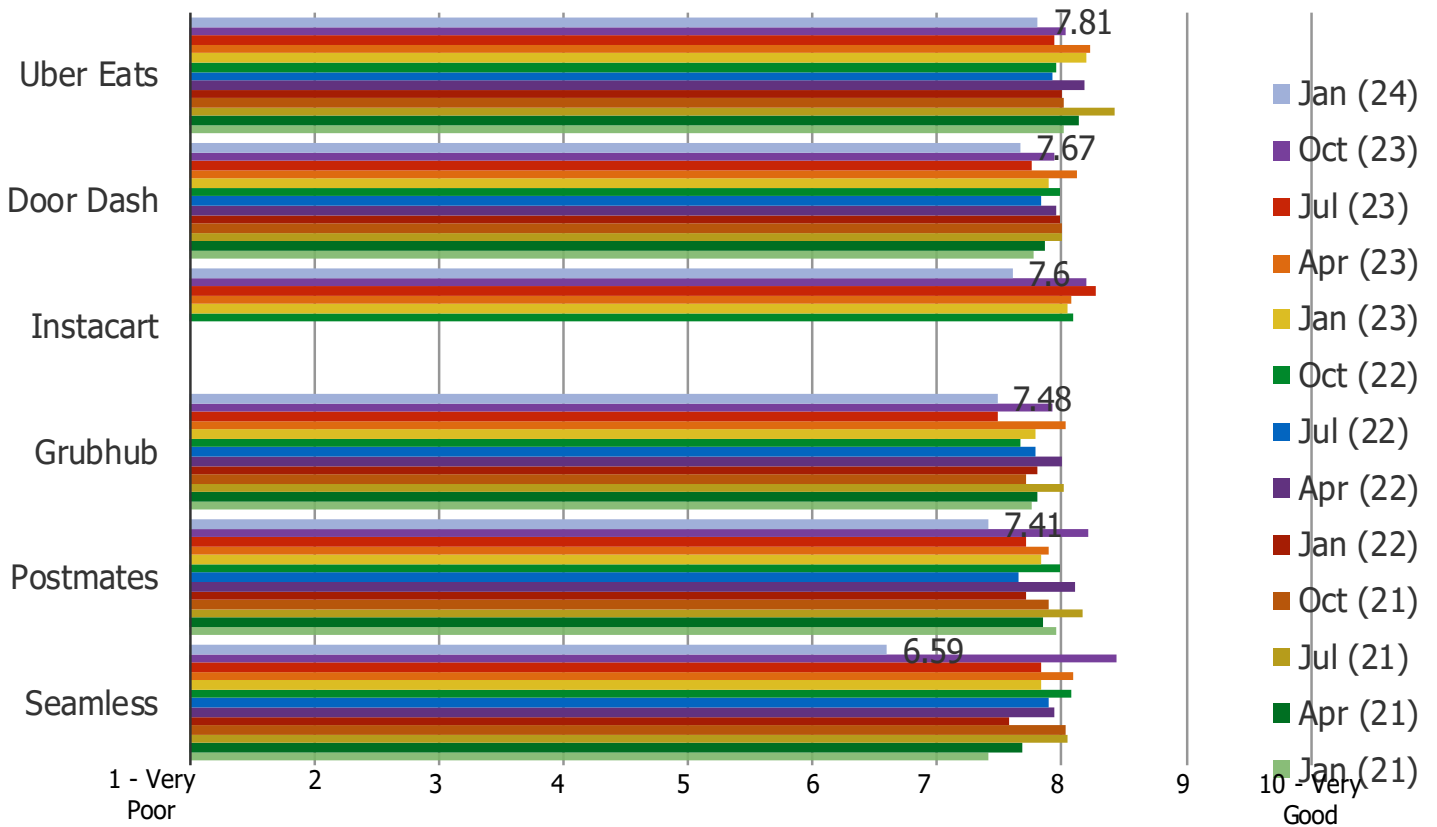
Posed to respondents who use food delivery apps.



N = 905

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

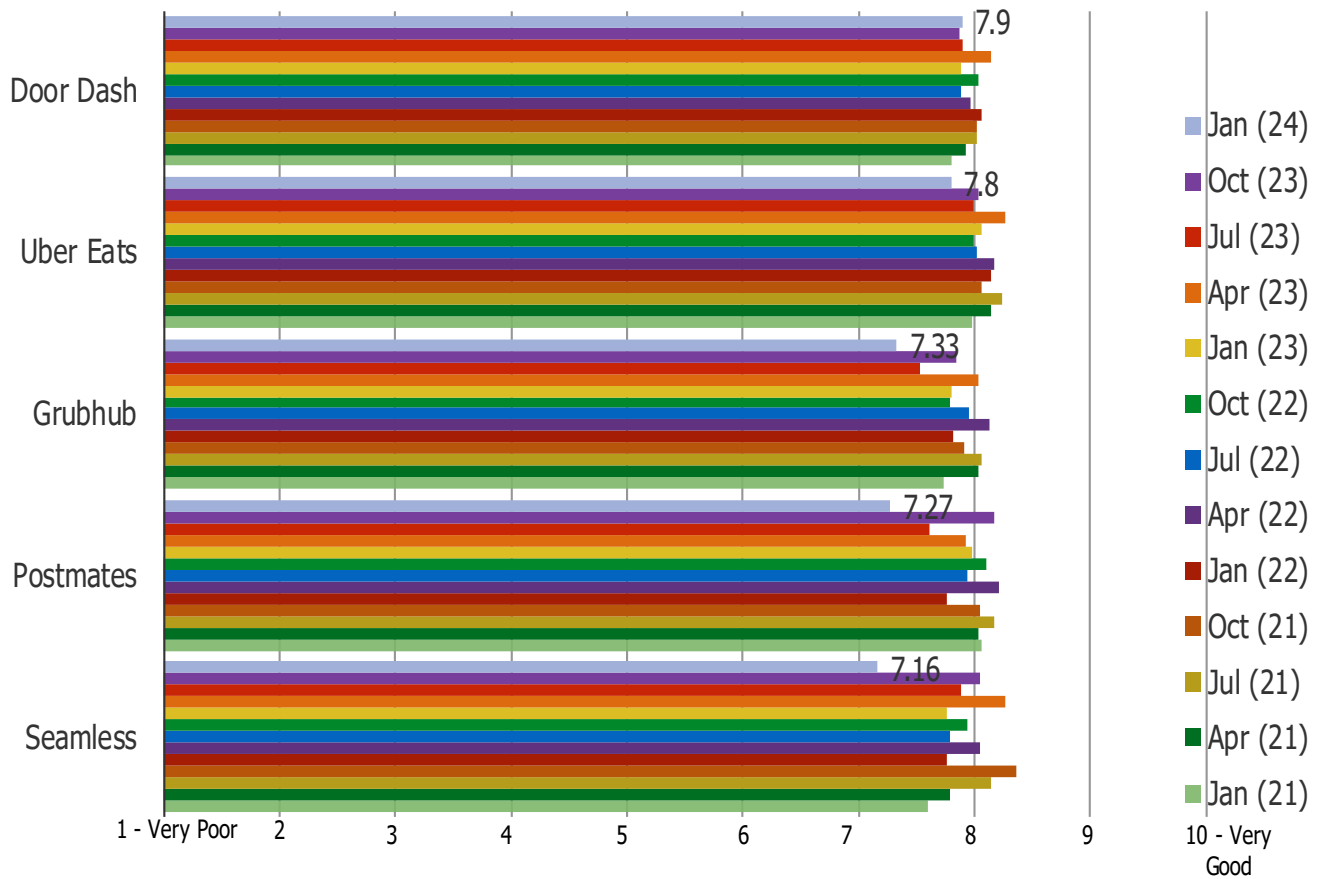
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	311
Door Dash	435
Seamless	32
Grubhub	180
Postmates	66
Instacart	125

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

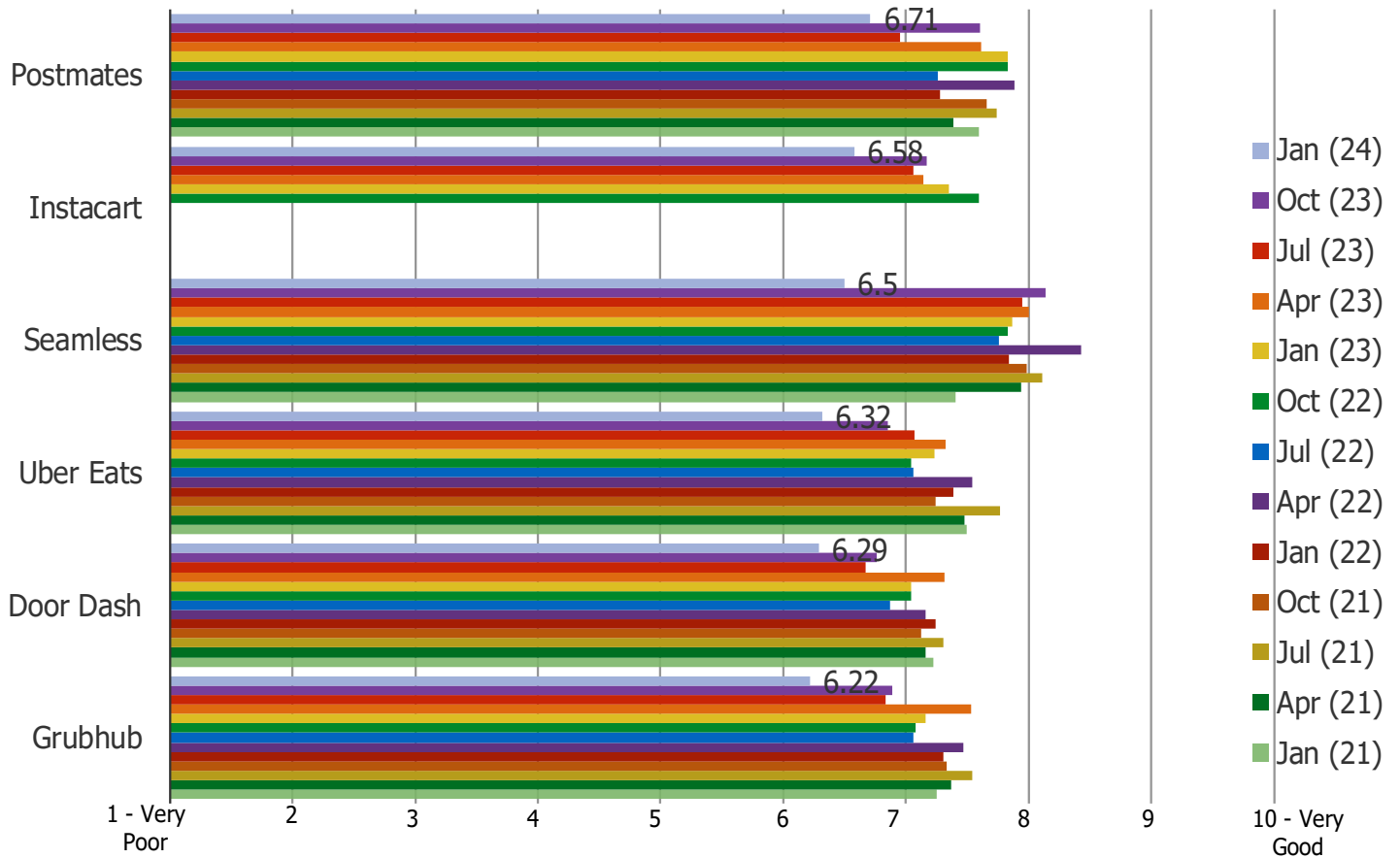
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	311
Door Dash	435
Seamless	32
Grubhub	180
Postmates	66
Instacart	125

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

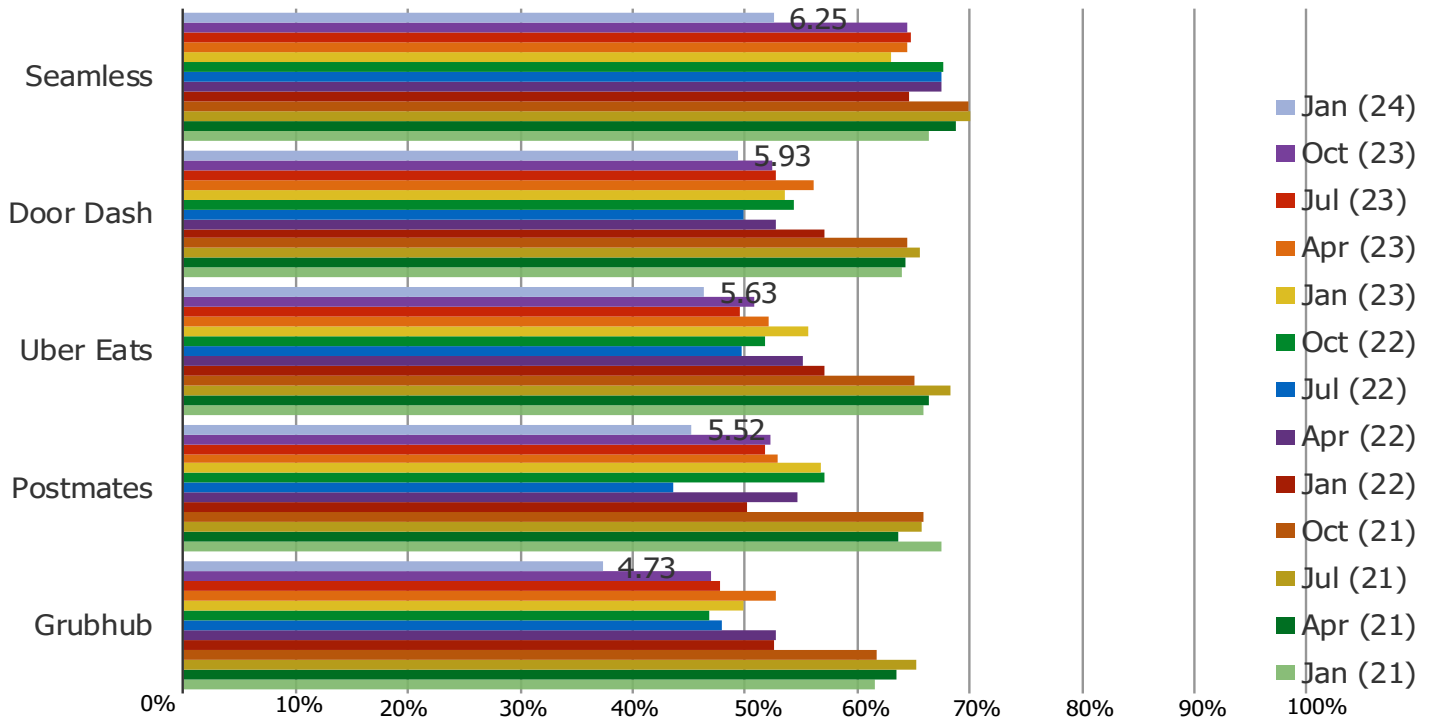
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	311
Door Dash	435
Seamless	32
Grubhub	180
Postmates	66
Instacart	125

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

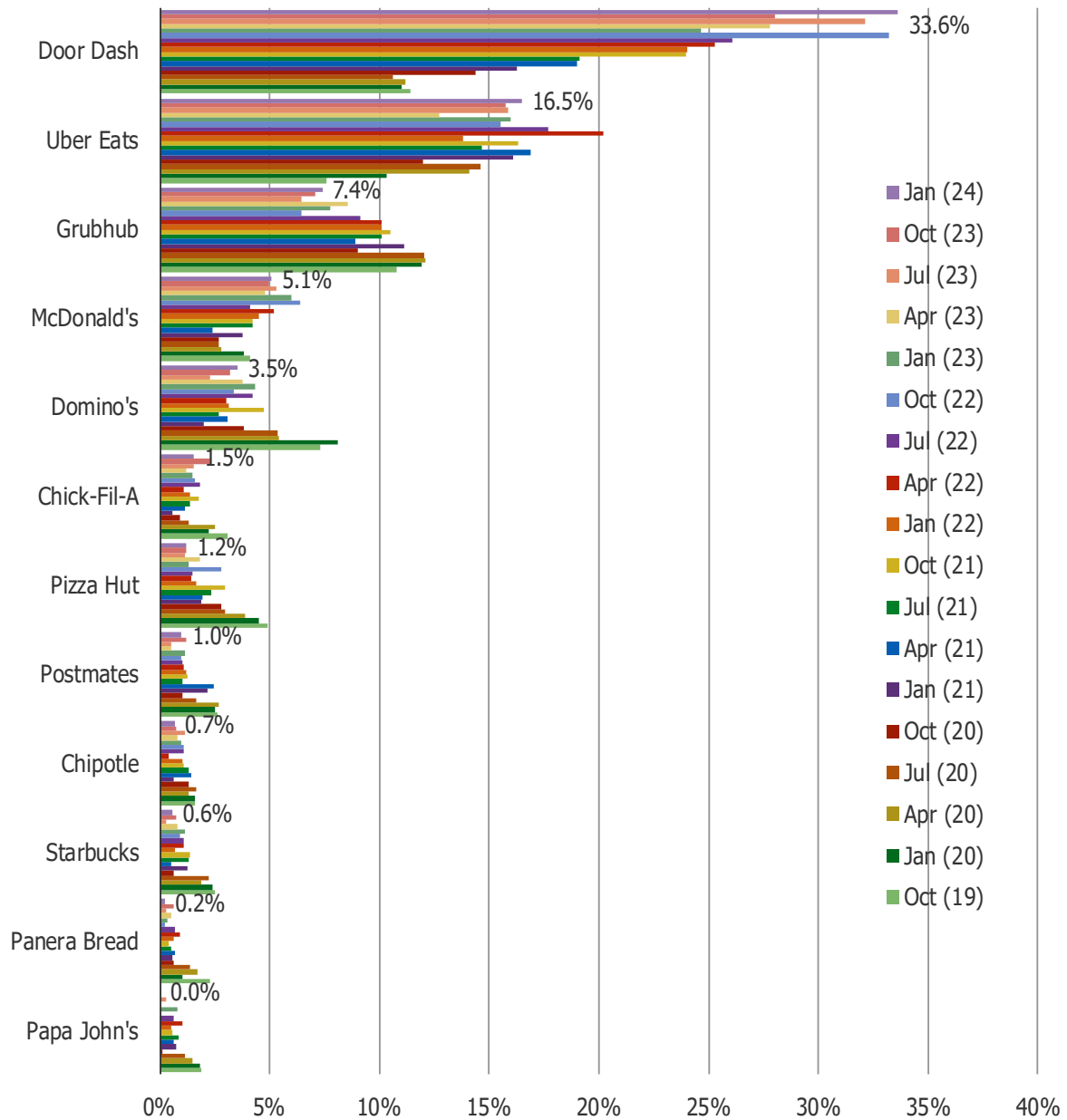
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	311
Door Dash	435
Seamless	32
Grubhub	180
Postmates	66
Instacart	125

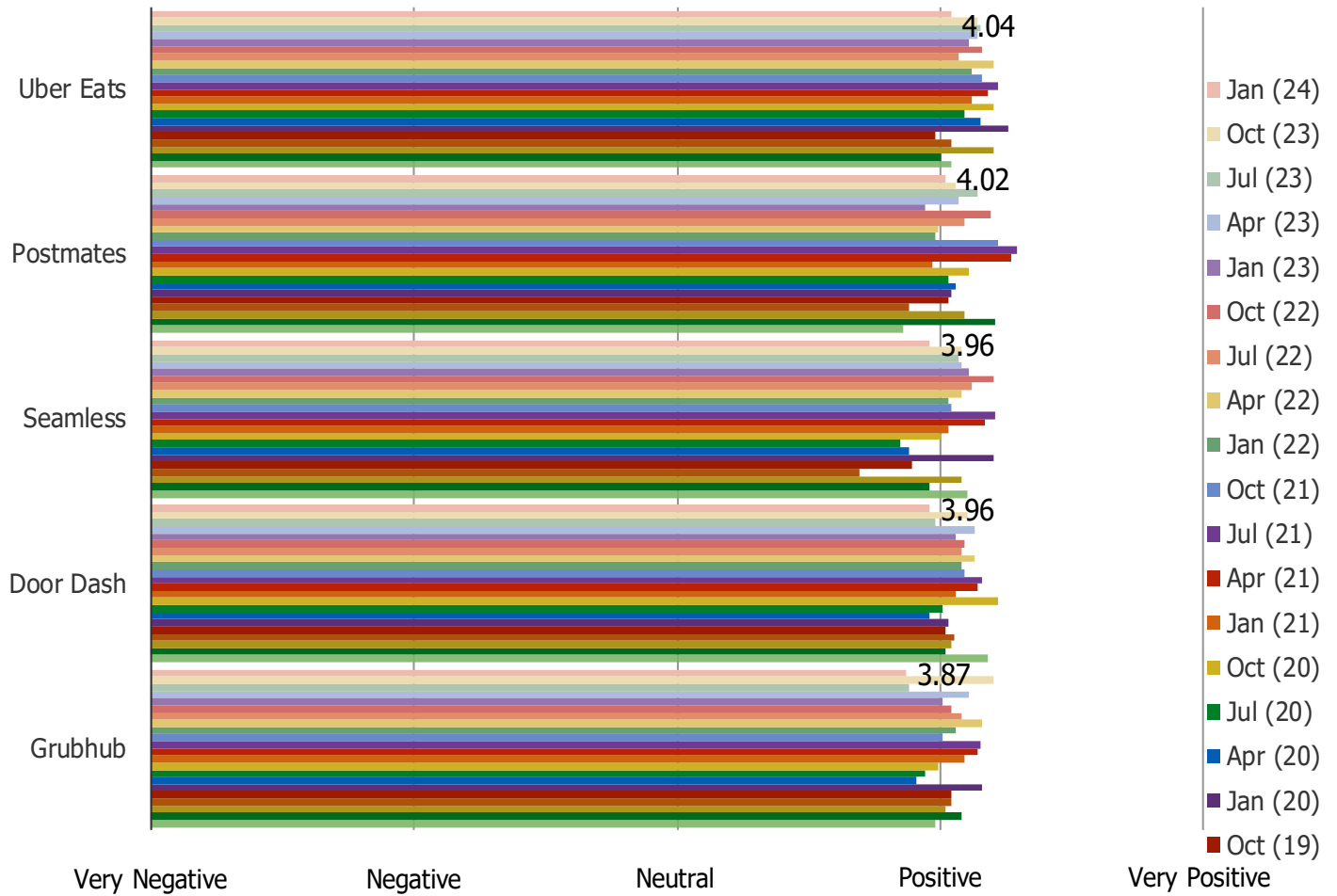
WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



WHAT IS YOUR OPINION OF THE PLATFORM?

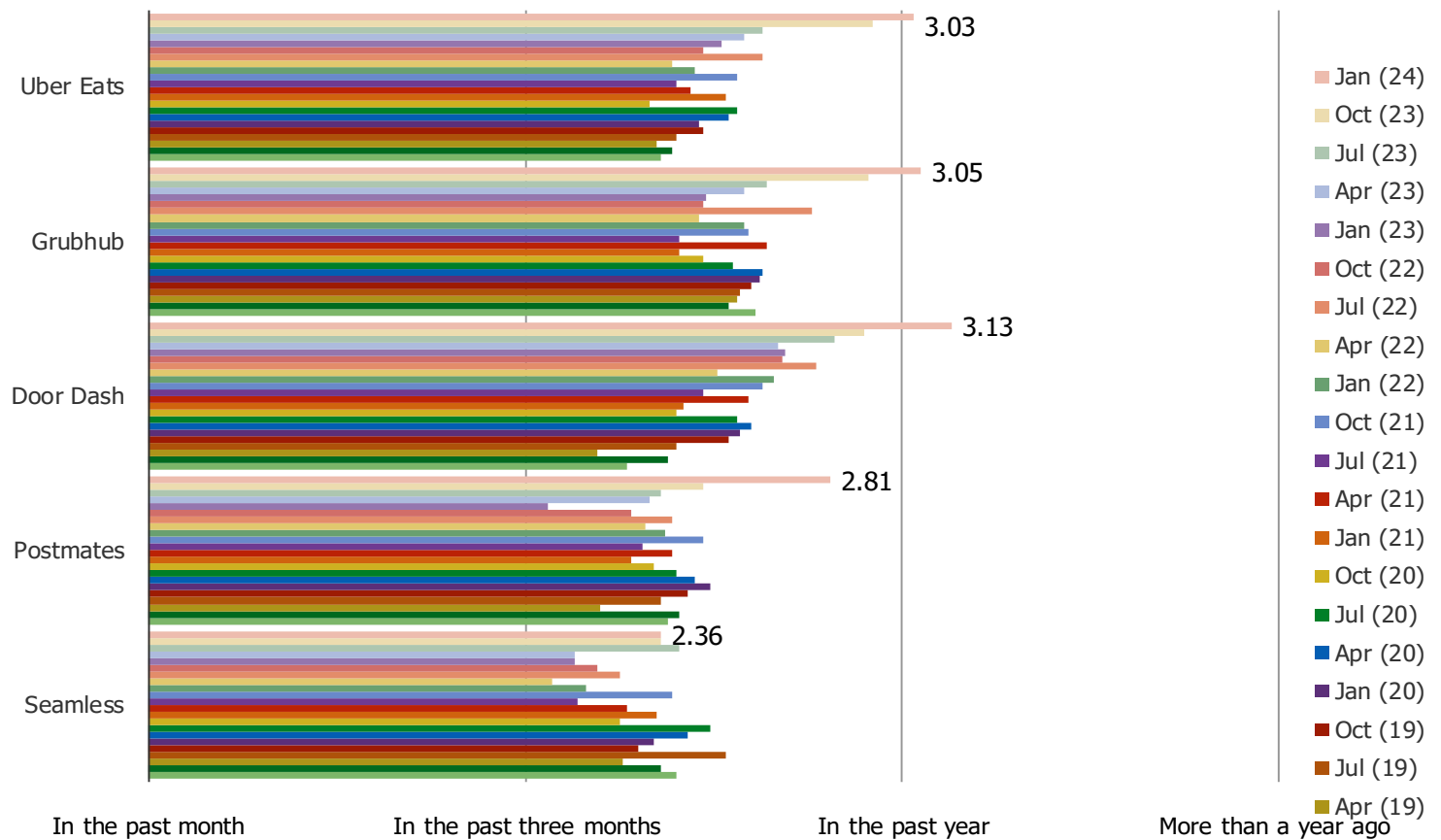
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	253
Door Dash	411
Seamless	25
Grubhub	151
Postmates	57

WHEN DID YOU FIRST START USING THIS PLATFORM?

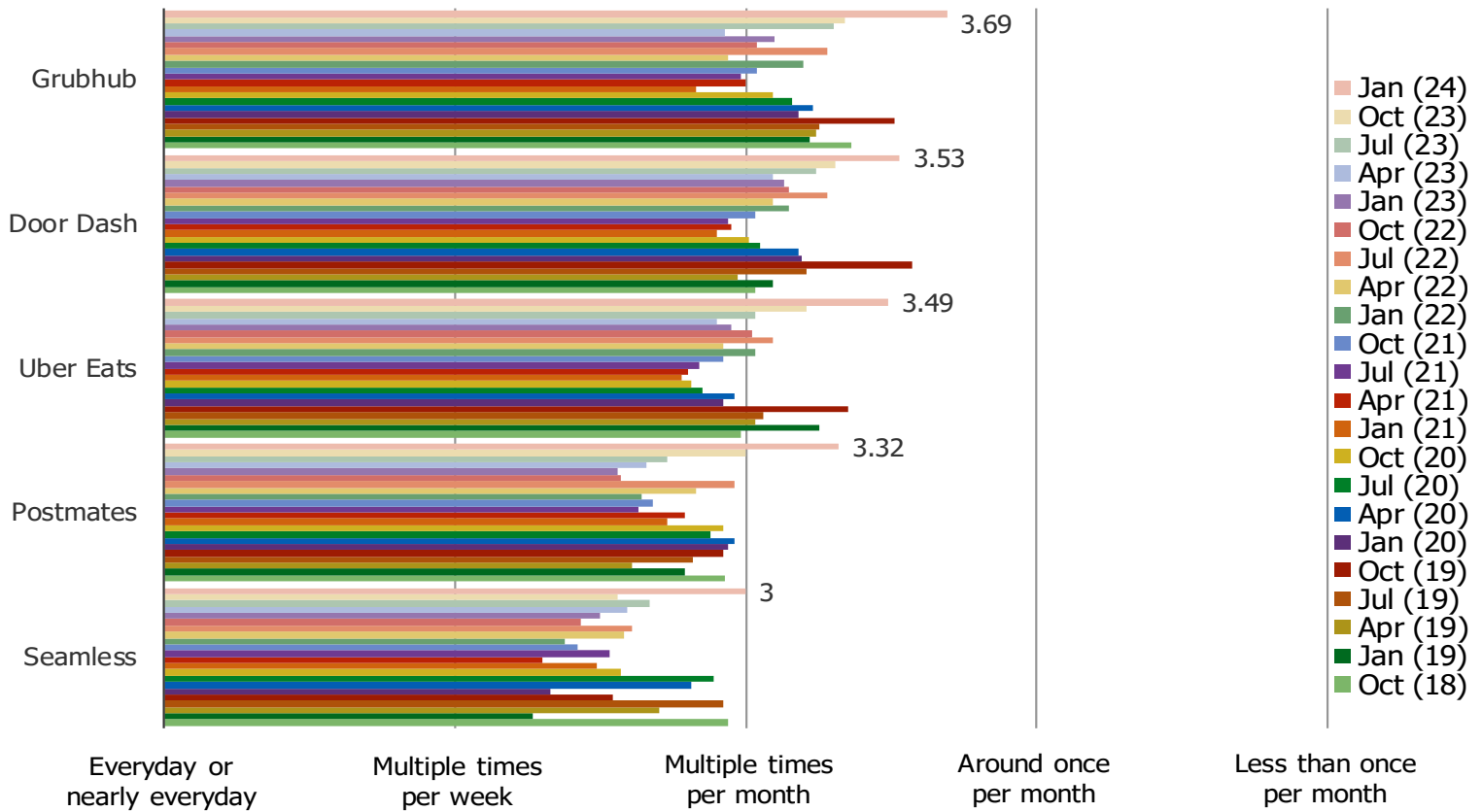
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	253
Door Dash	411
Seamless	25
Grubhub	151
Postmates	57

HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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

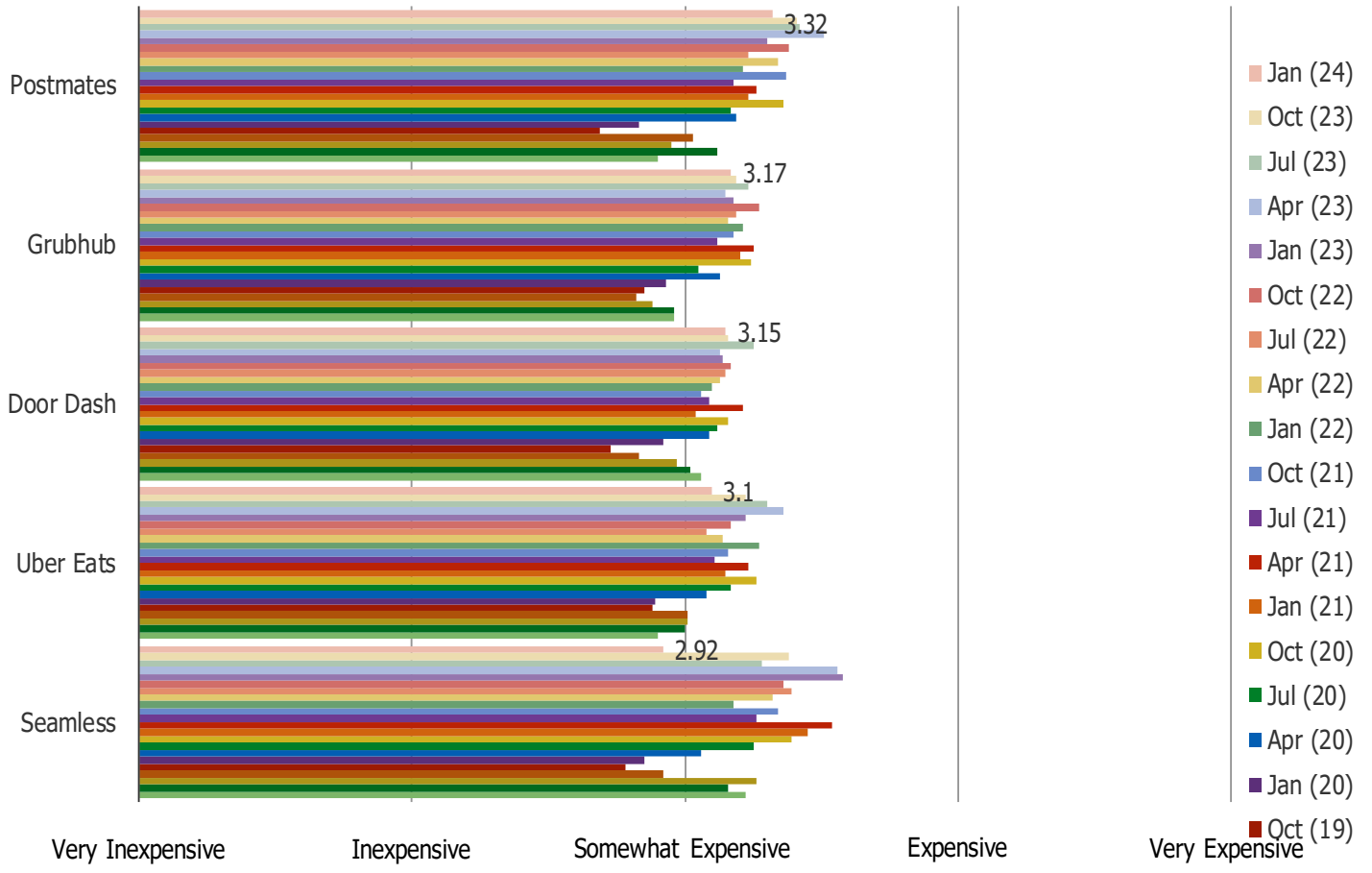


More Frequent

	N=
Uber Eats	253
Door Dash	411
Seamless	25
Grubhub	151
Postmates	57

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

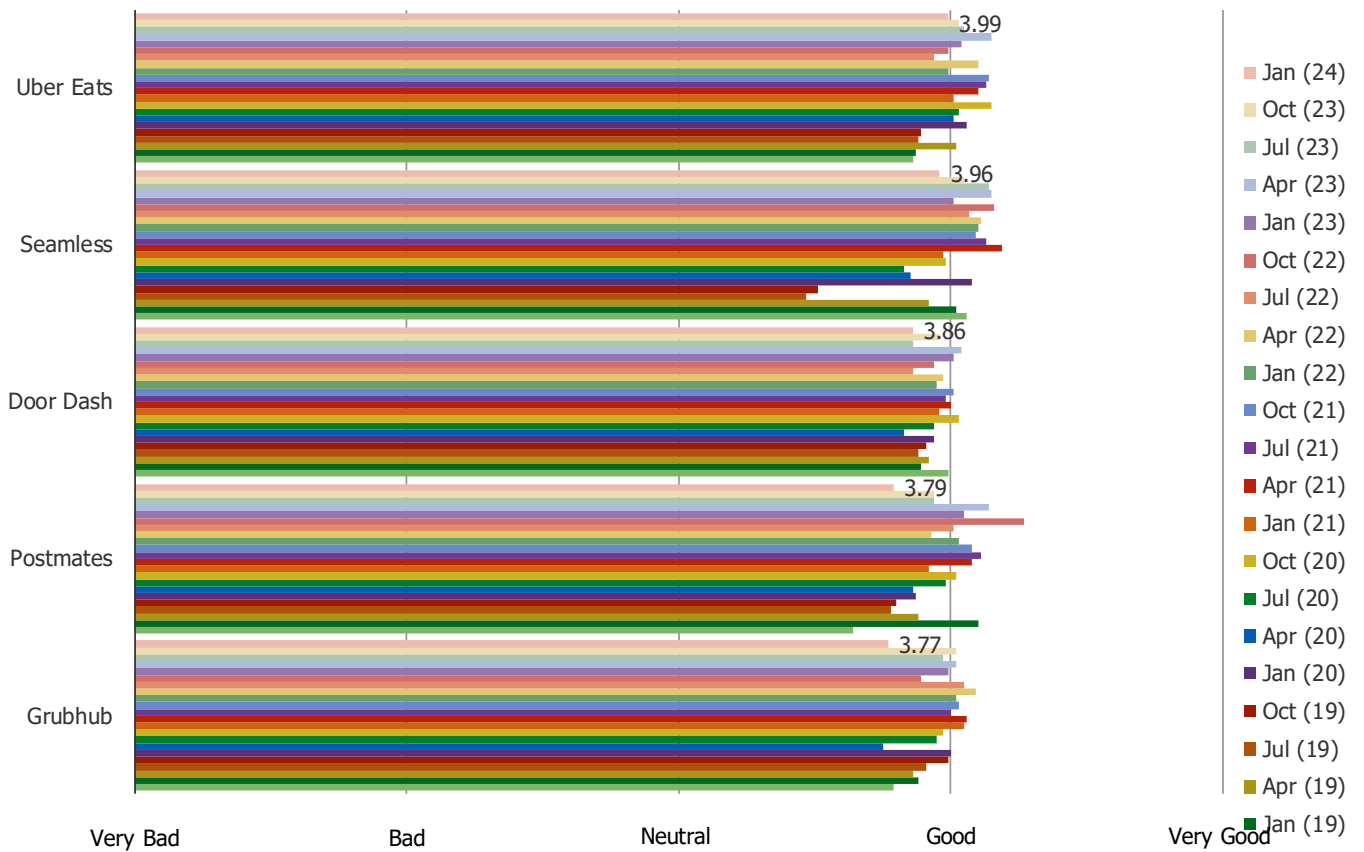
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	253
Door Dash	411
Seamless	25
Grubhub	151
Postmates	57

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.



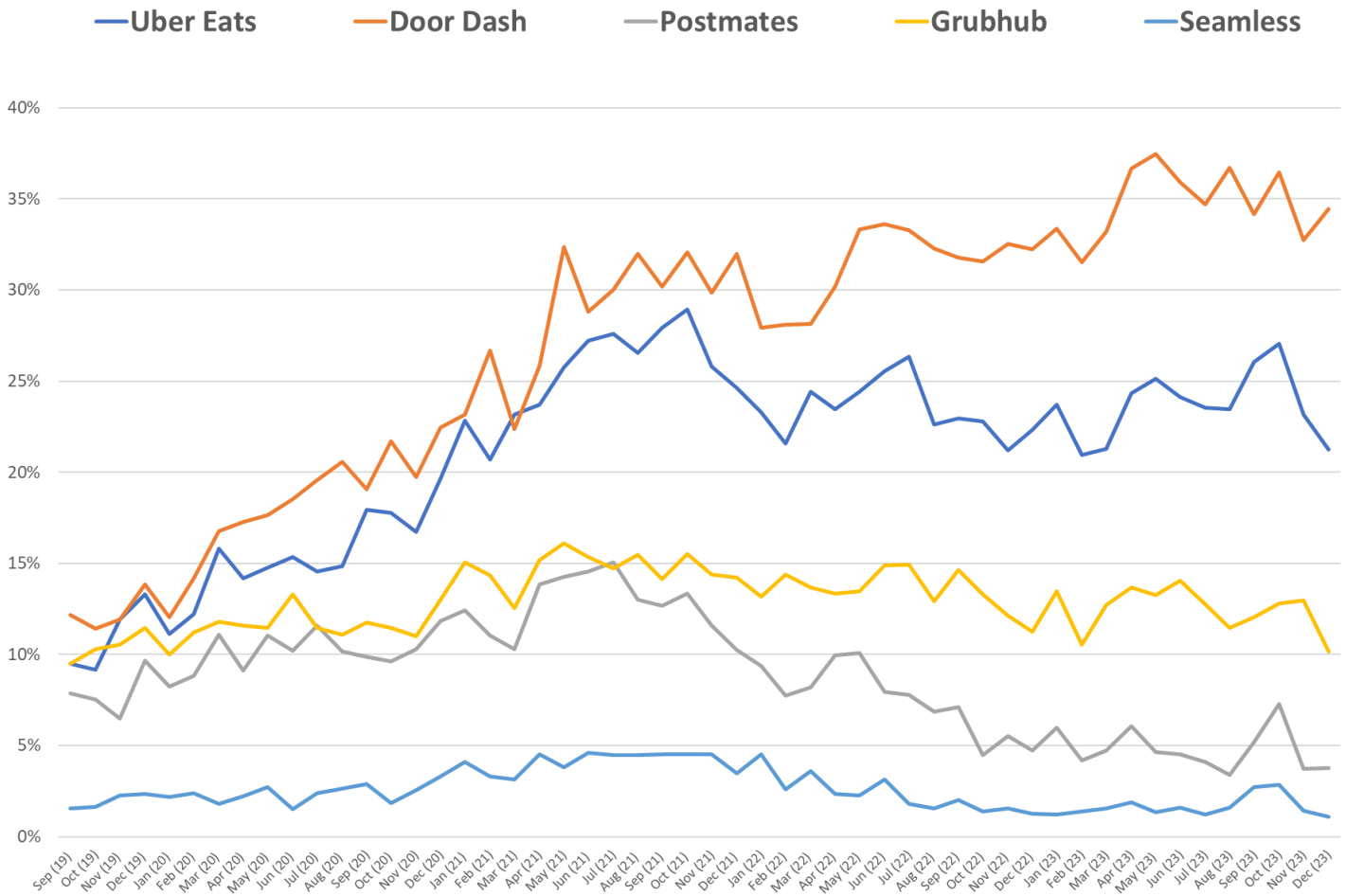
	N=
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Food Delivery Apps

MONTHLY DATA

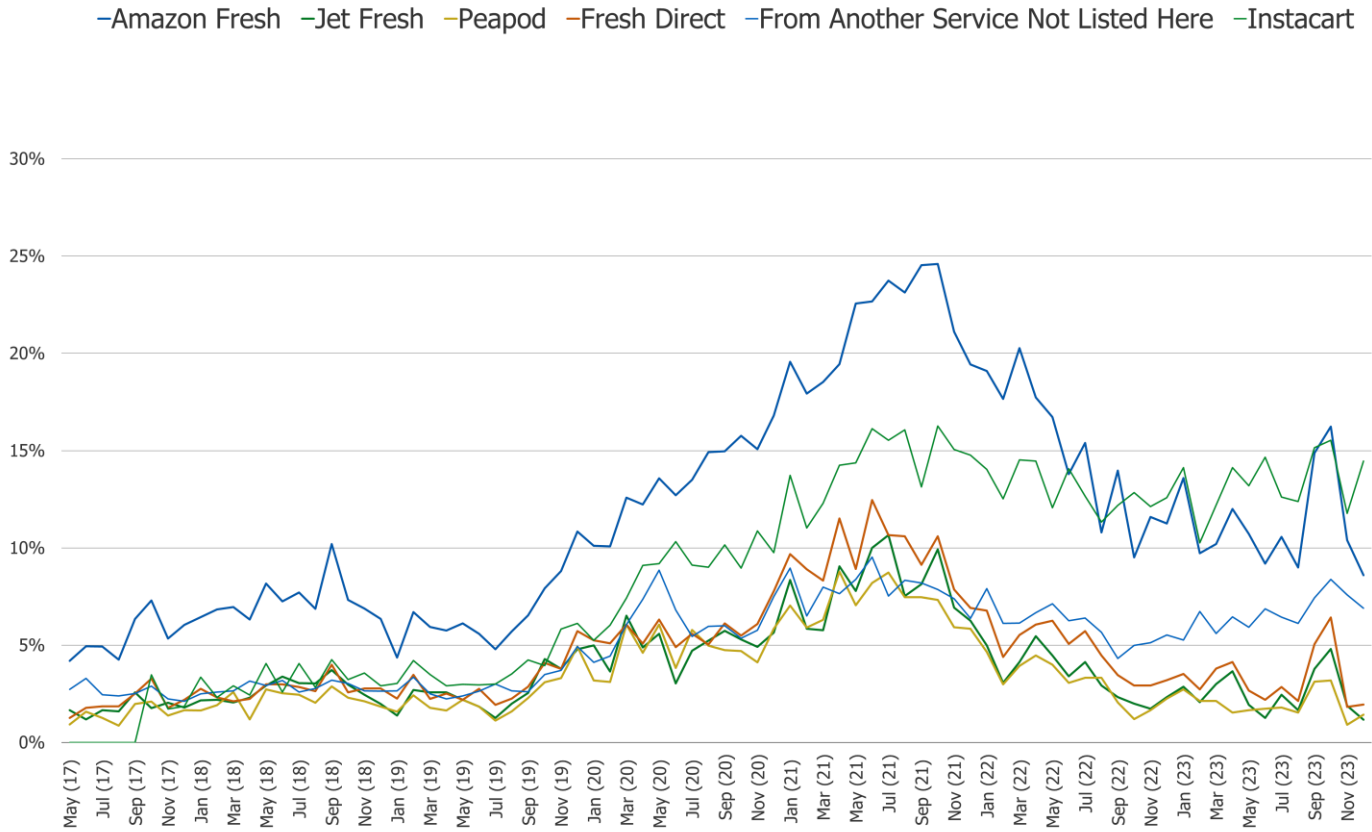
DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.



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

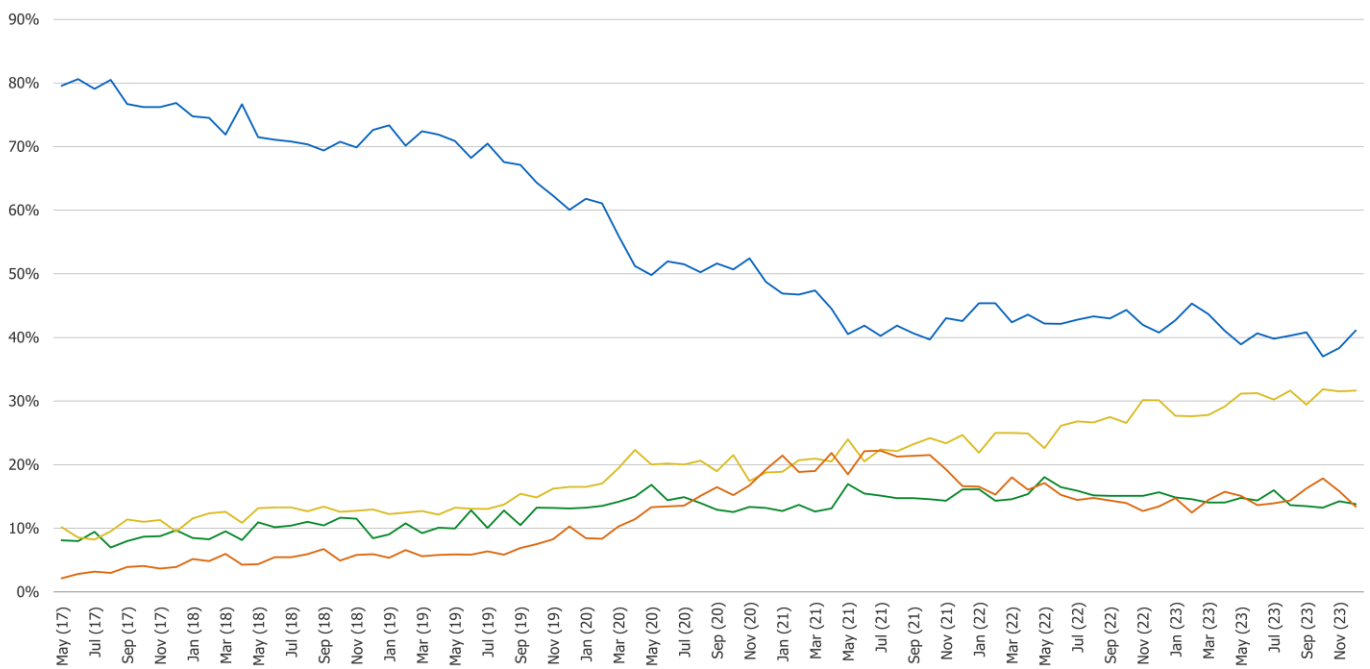
Posed to all respondents.



PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING GROCERIES ONLINE:

Posed to all respondents.

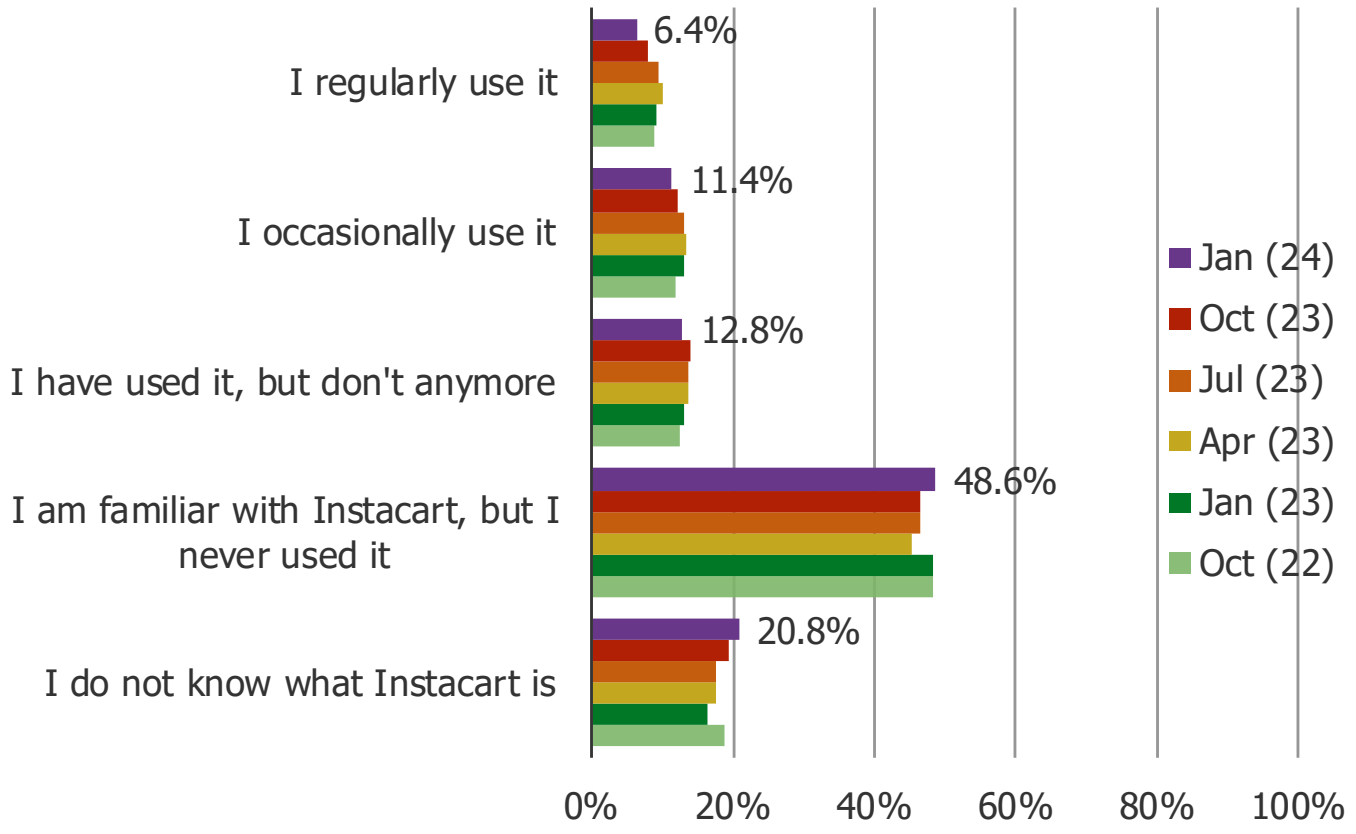
- I have never ordered groceries online
- I order groceries online occasionally
- I ordered groceries online once, but not again since
- I order groceries online regularly



INSTACART DEEPER DIVE

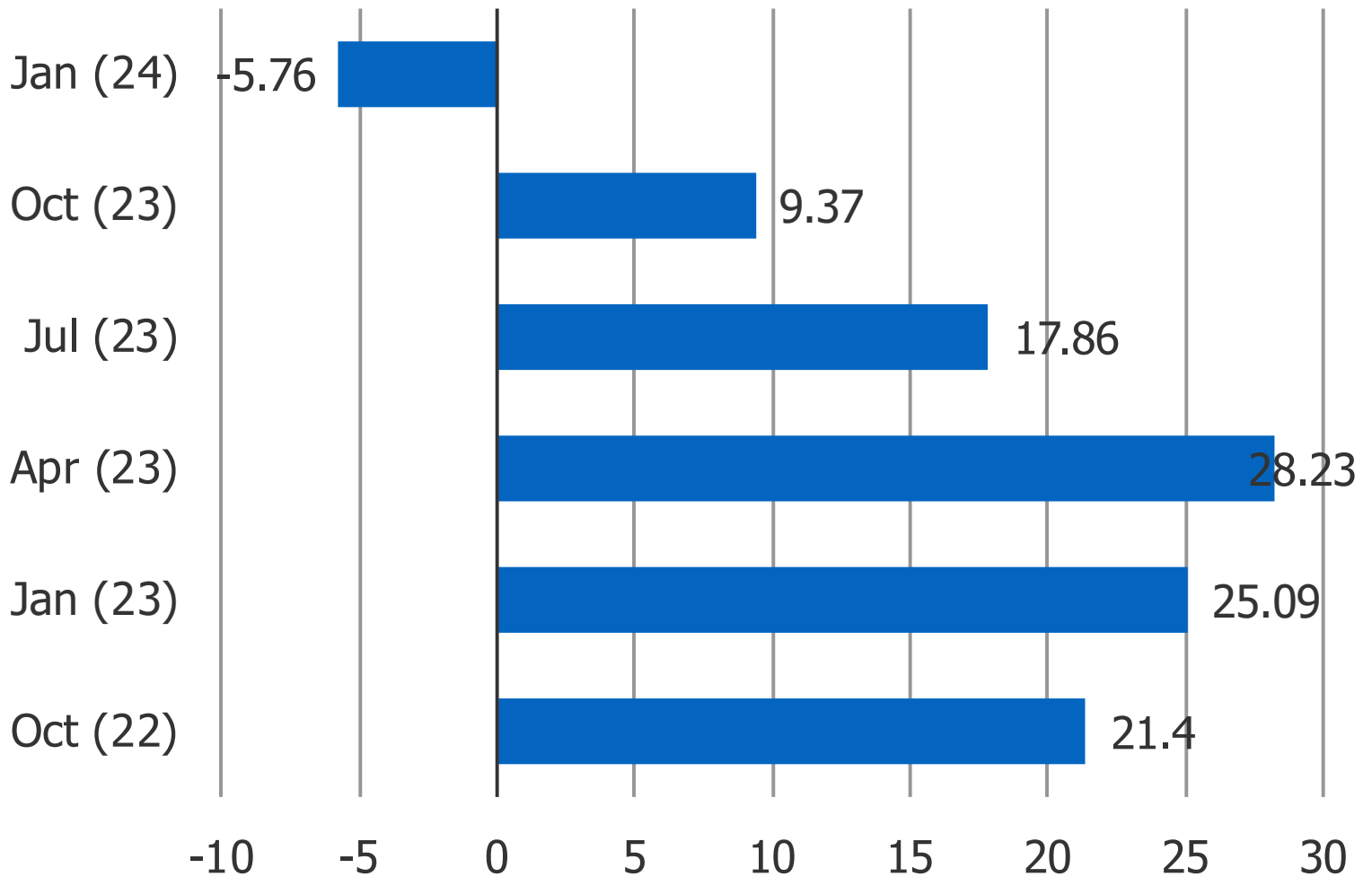
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

Posed to all respondents.



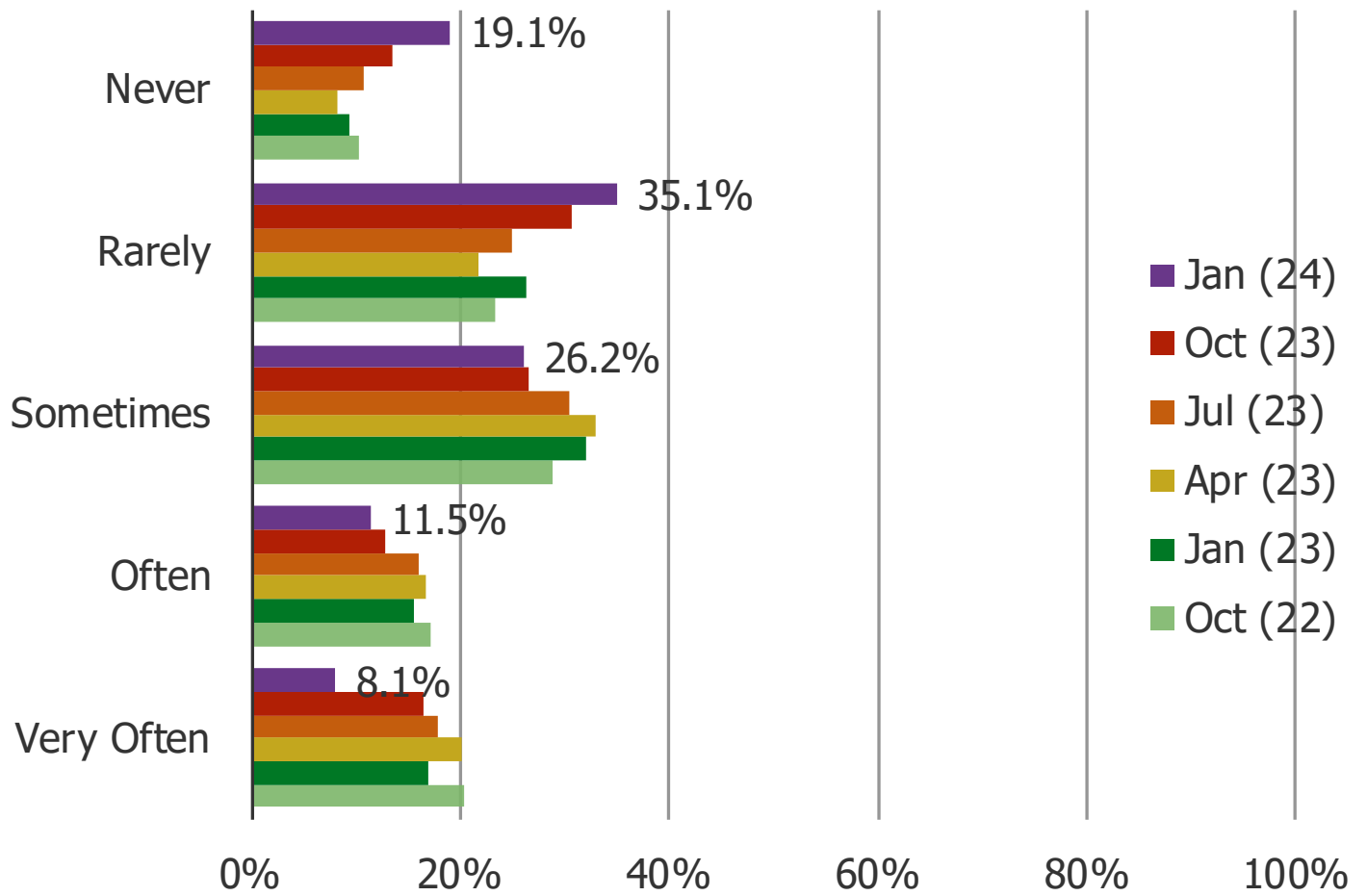
HOW LIKELY IS IT THAT YOU WOULD RECOMMEND INSTACART TO A FRIEND OR COLLEAGUE?

Posed to all respondents who have ever used Instacart.



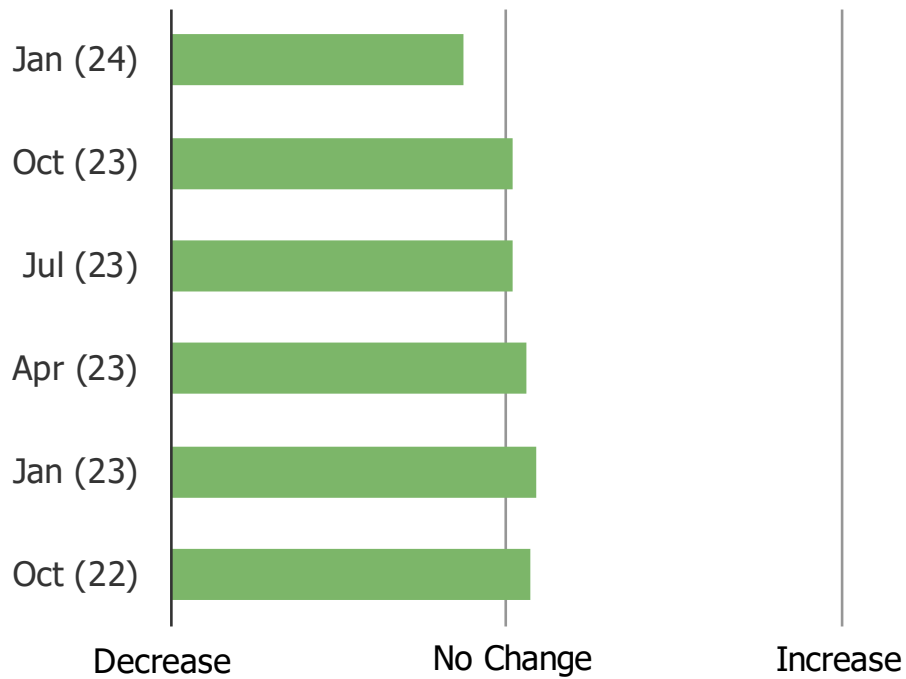
HOW OFTEN DO YOU USE INSTACART?

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 = 382)



January 2024 Data

