

Bespoke Survey Research

April 2024

Food Delivery

Volume 31 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: UBER, DASH, GRUB, CART.

Key Takeaways:

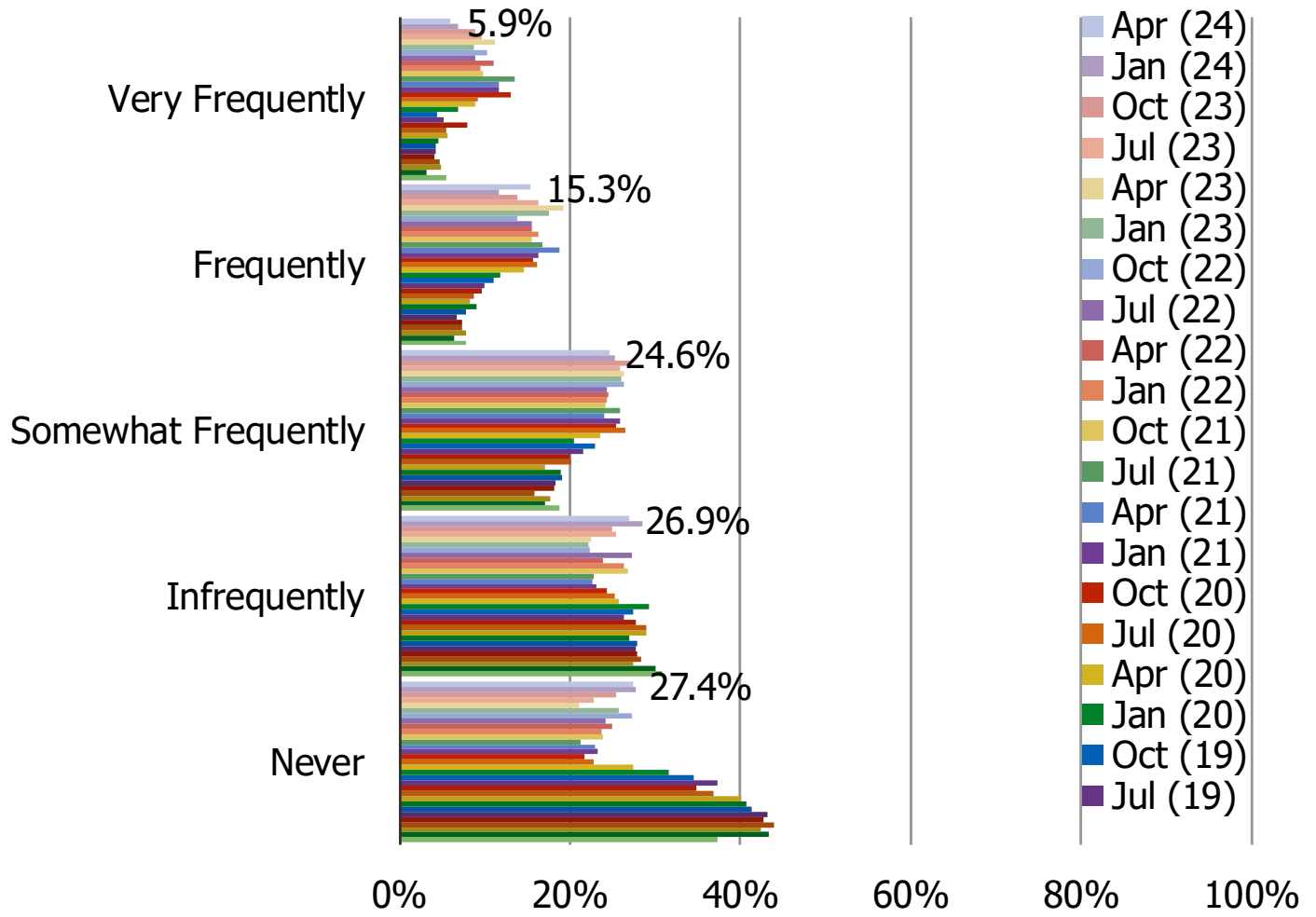
- Consumers continue to pull back on food delivery apps usage.
- Over time, the share of consumers who view food delivery and grocery delivery as a necessity as declined. The percentage who view it as either a luxury or neither a luxury nor a necessity has grown over time.
- Low fees is the most important factor for choosing which food delivery app to use. The share of respondents who say low fees is most important has increased over time, especially in recent waves.
- Food delivery users overall and those use BOTH DoorDash and Uber Eats prefer DoorDash. Over time, sentiment has shifted more in favor of DoorDash relative to Uber Eats.
- Our cross-over analysis has shown that an increasing share of users on competitive platforms are adopting Door Dash, and a declining share of Door Dash users are also using other platforms. The latter and former are KPIs suggesting share gains among the population for Door Dash.
- In terms of specific platforms/apps, DoorDash continue to perform well relative to key competitors.
- Instacart's NPS is far higher among regular users than occasional users. Among those who are aware of it but don't use it, NPS is negative. The share of self-reported "regular" users has declined over time, which has weighed on the score.
- Regular usage of Instacart continues to decline and hit a new series low this quarter.

Food Delivery Apps

FOOD DELIVERY

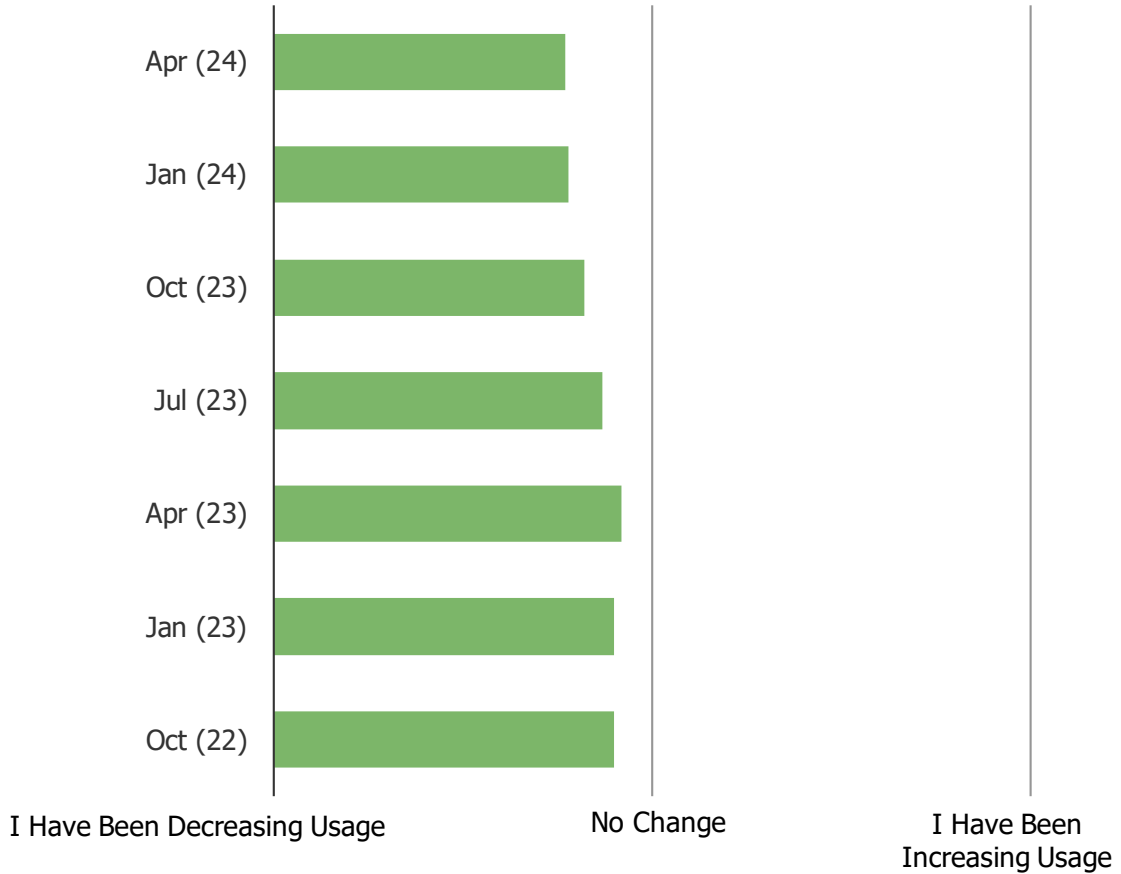
HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



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

Posed to respondents who use food delivery apps.

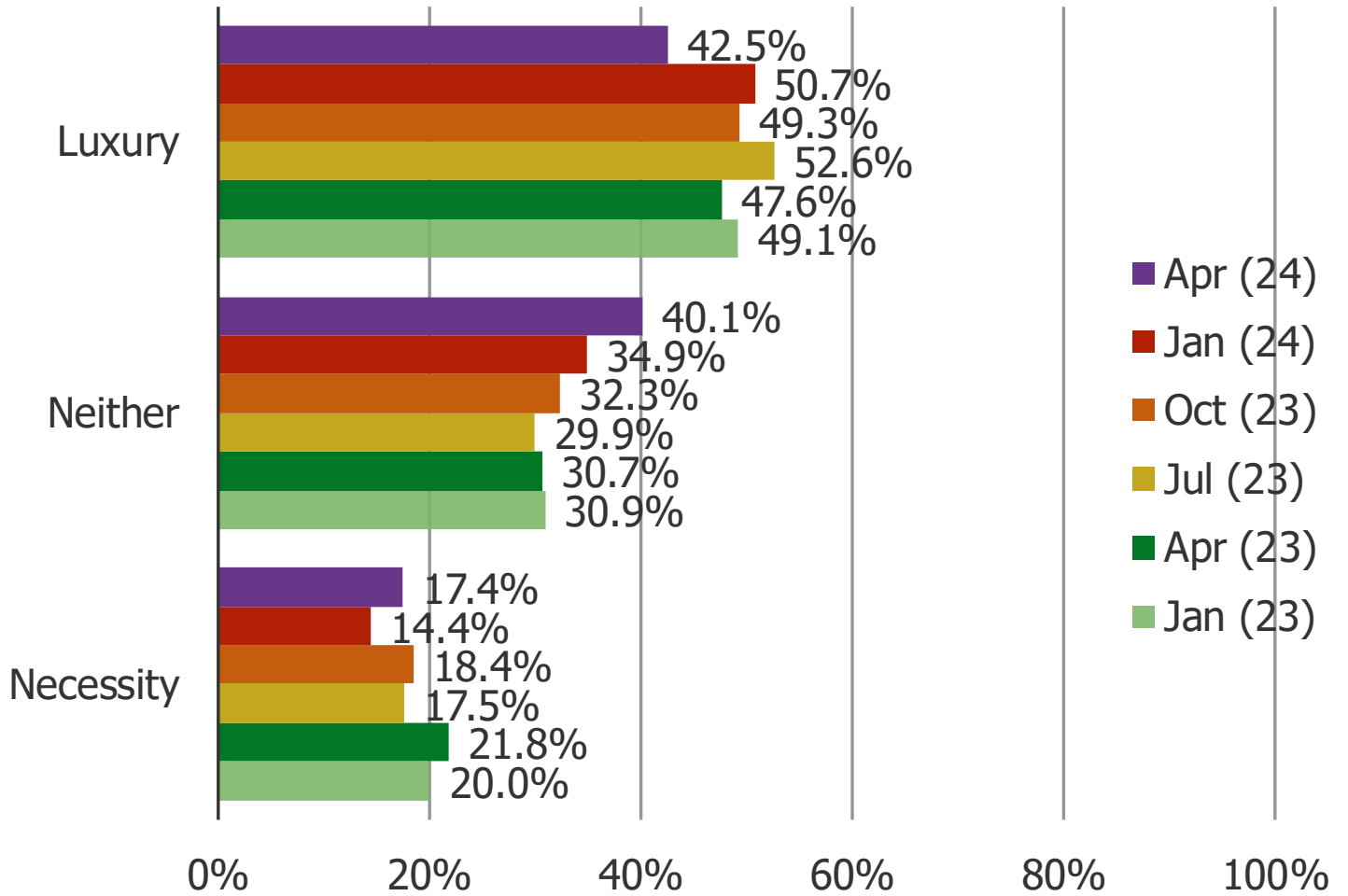


Optional Comments:



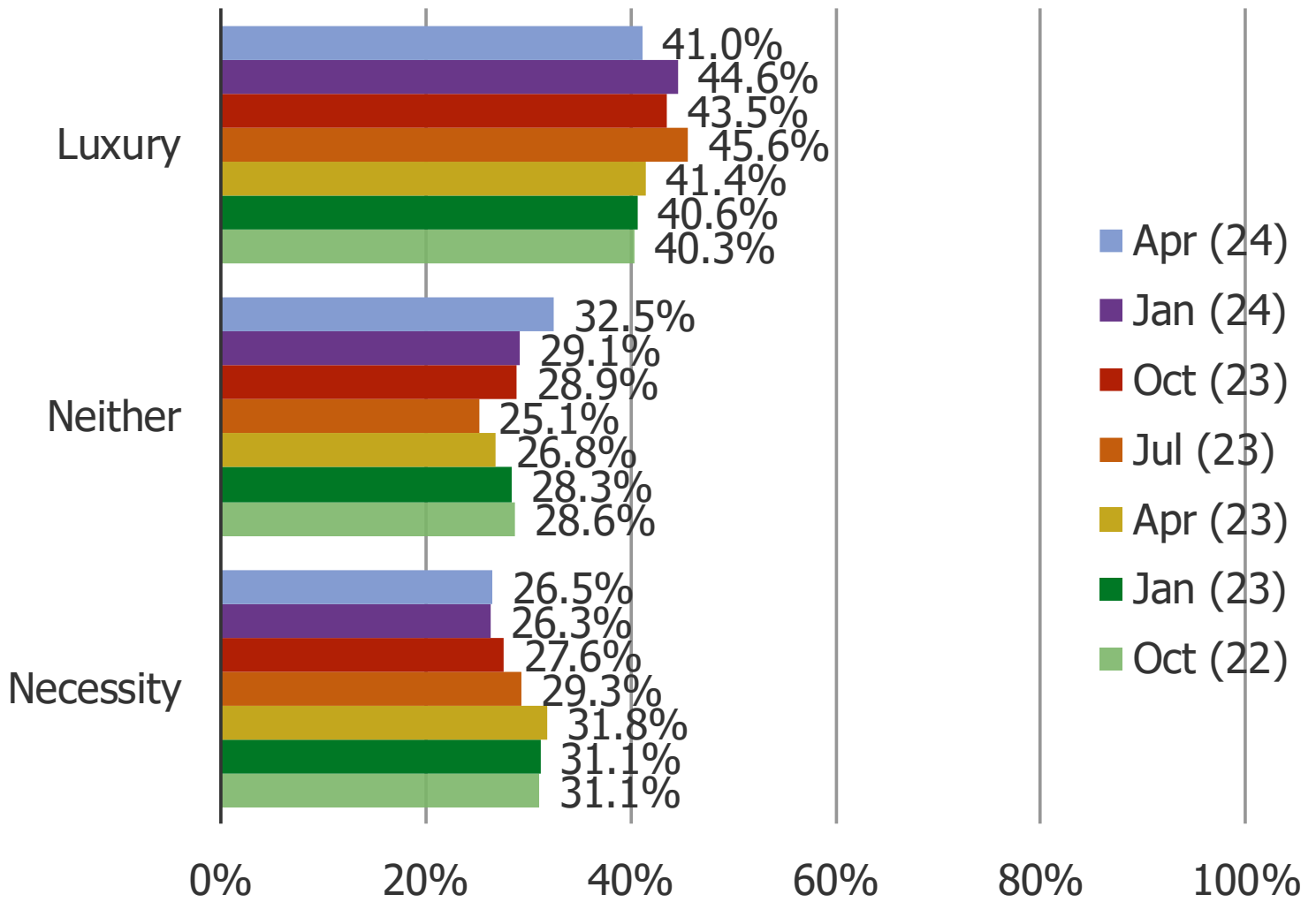
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.



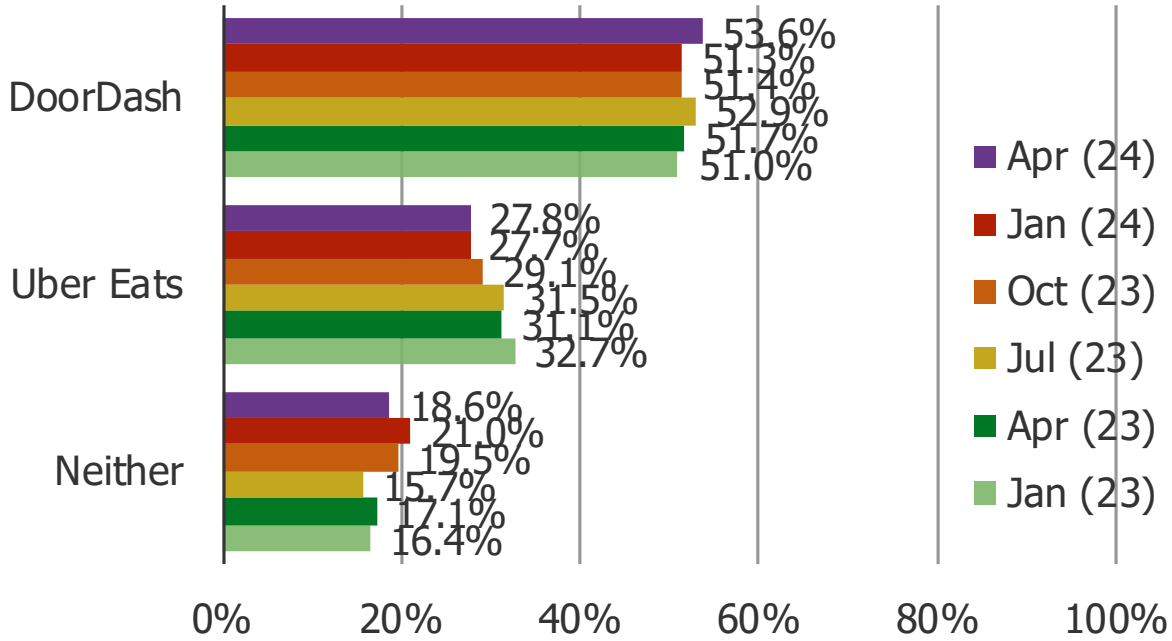
DO YOU VIEW GROCERY DELIVERY AS MORE OF A...

Posed to all respondents.

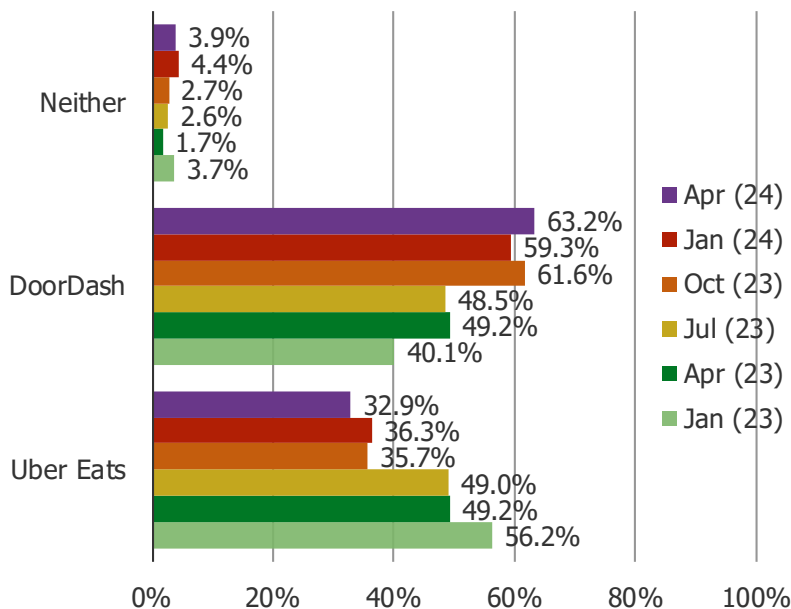


IF YOU HAD TO CHOOSE ONLY ONE OF THESE TO USE, WHICH WOULD YOU PICK?

Posed to all food delivery users.



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



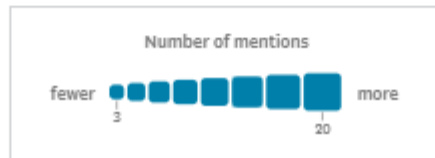
PREFERS DOORDASH OVER UBER EATS, WHY?

Posed to users of BOTH who prefer DoorDash



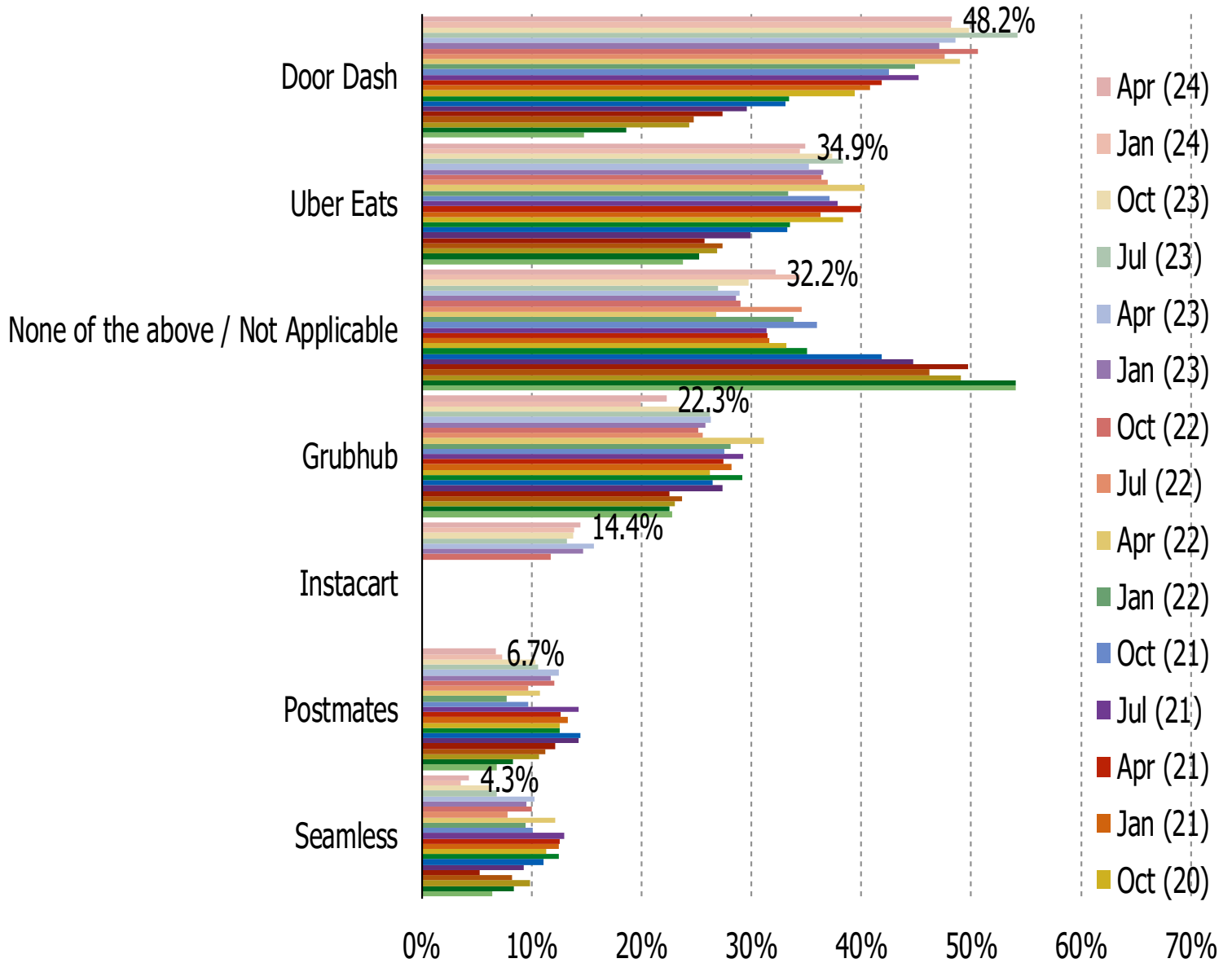
PREFERS DOORDASH OVER UBER EATS, WHY?

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



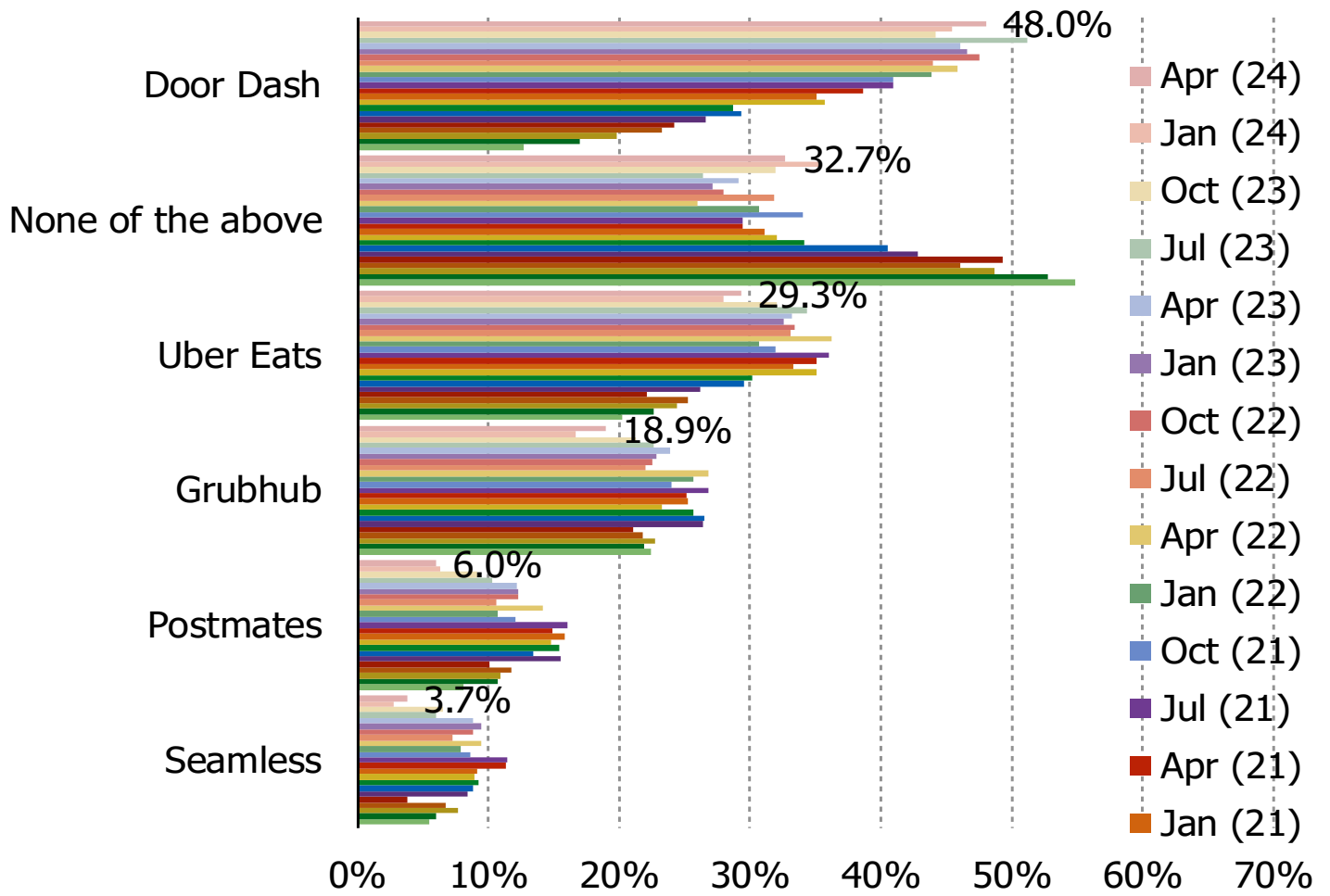
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.



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

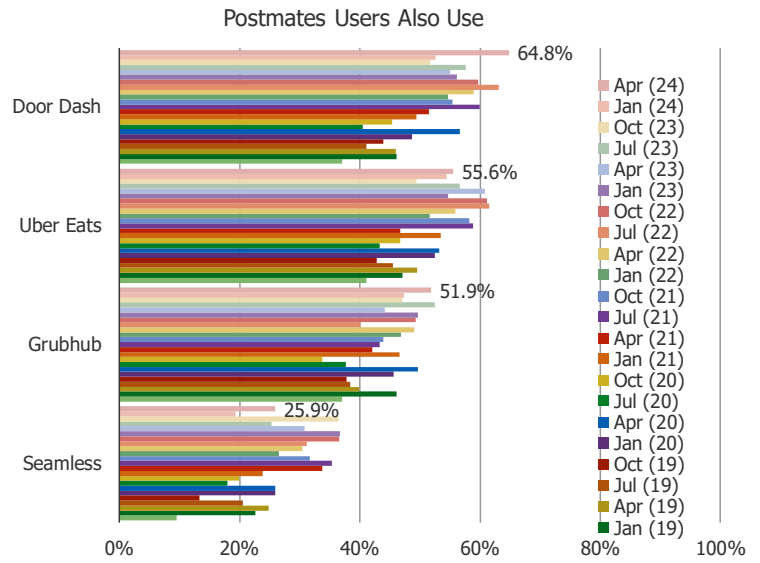
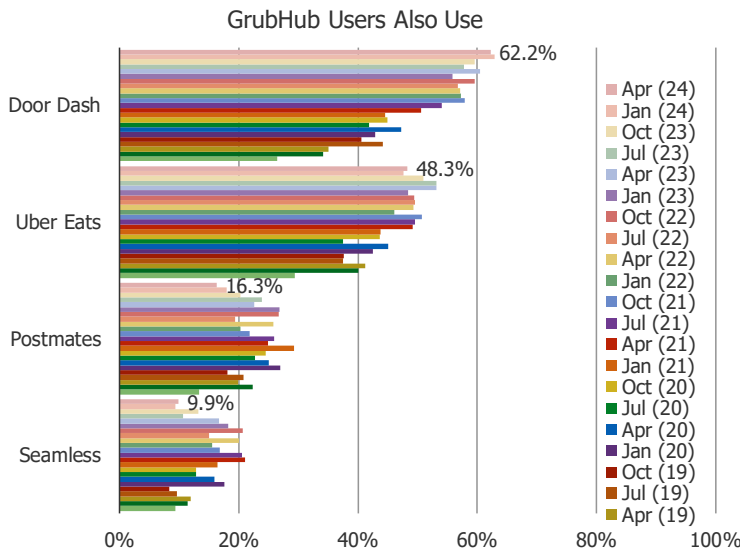
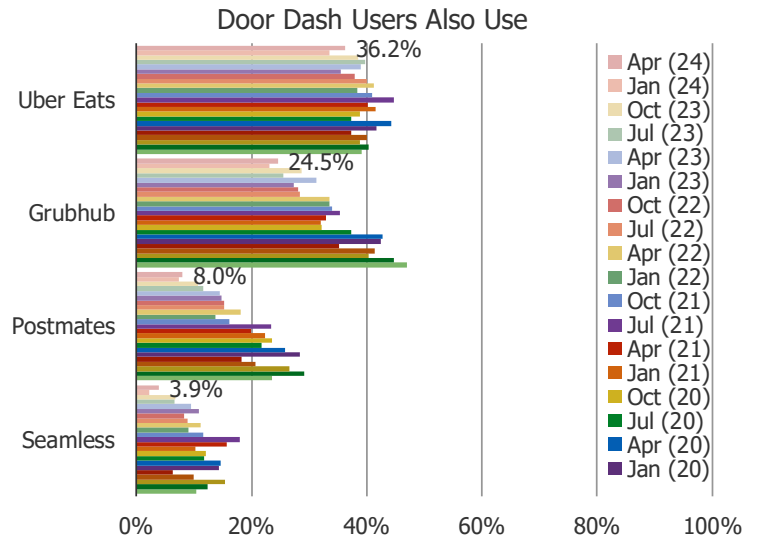
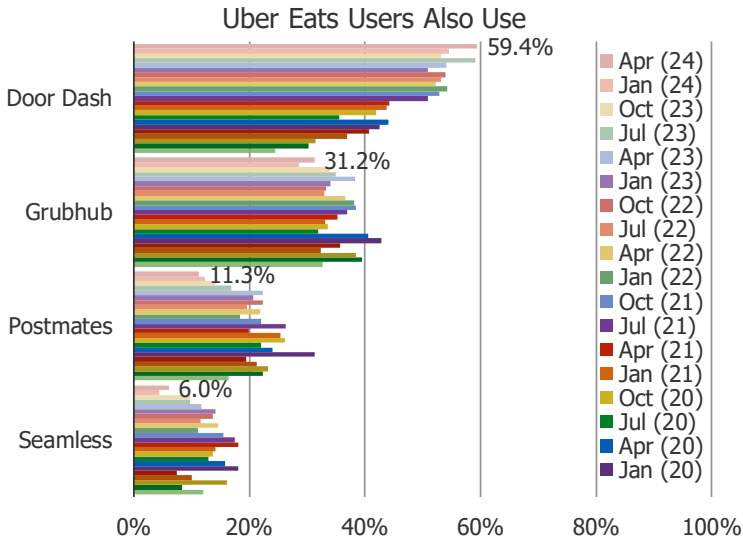
Posed to respondents who use food delivery apps.



N = 908

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

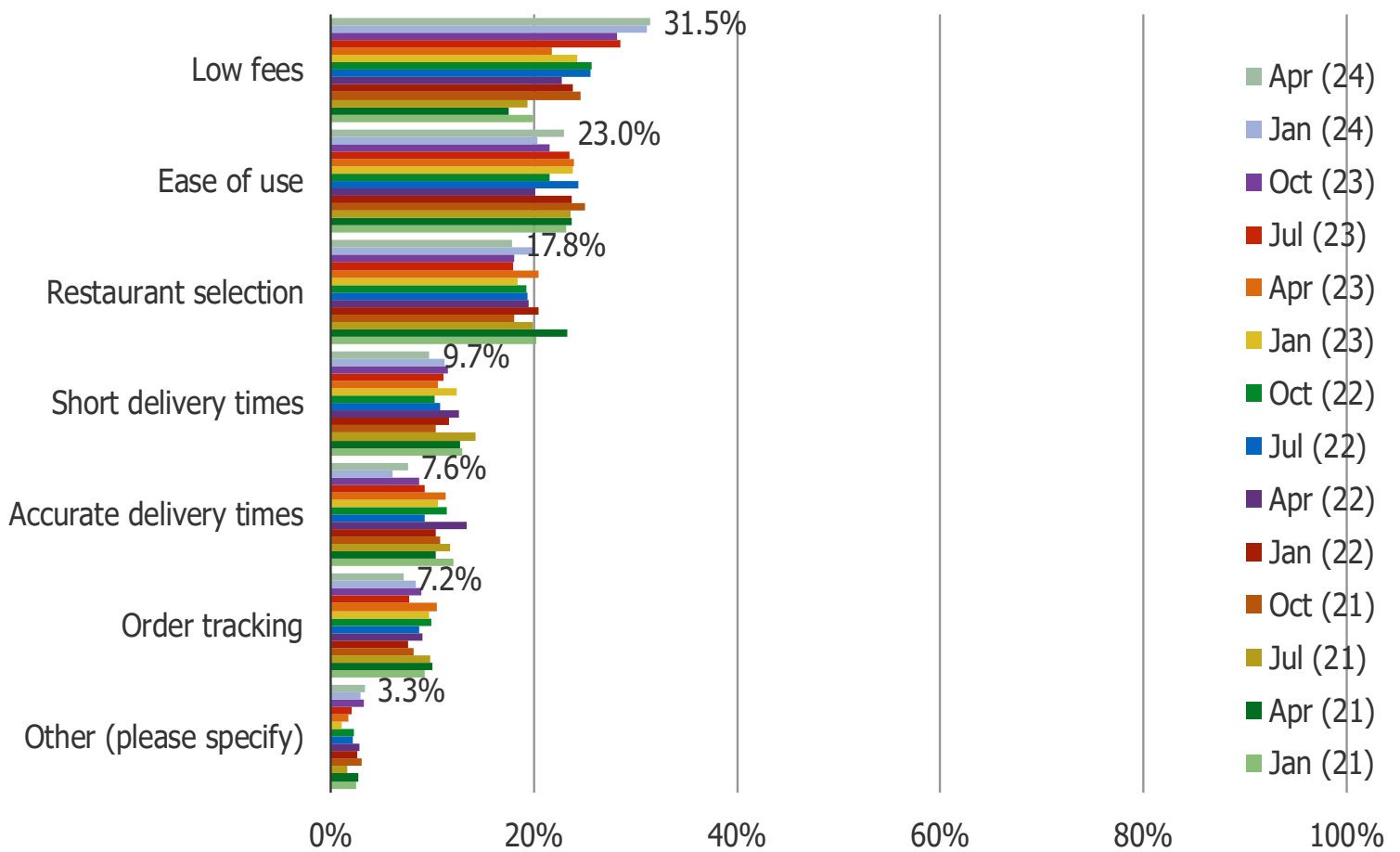
Posed to respondents who use food delivery apps.



	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

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

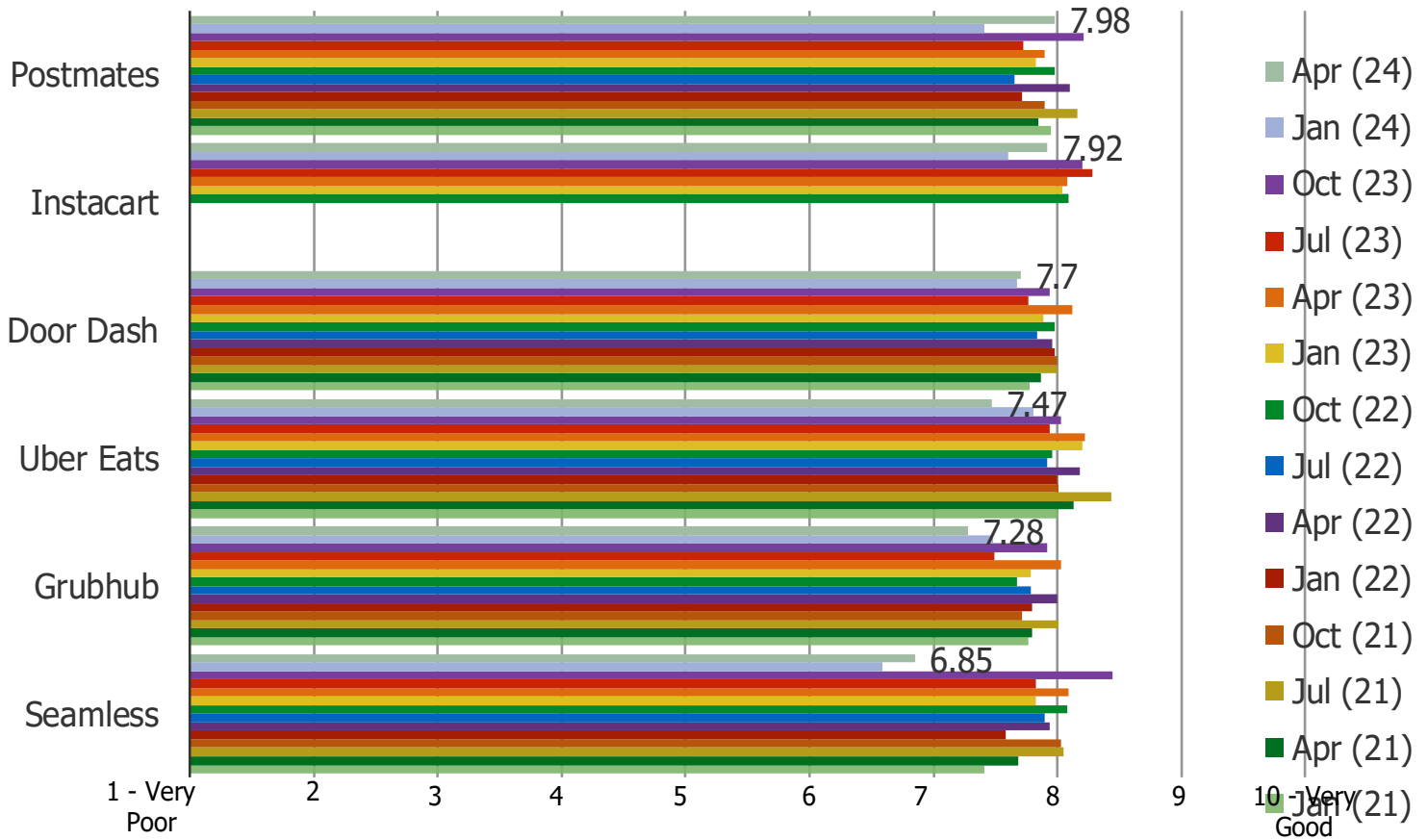
Posed to respondents who use food delivery apps.



N = 909

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

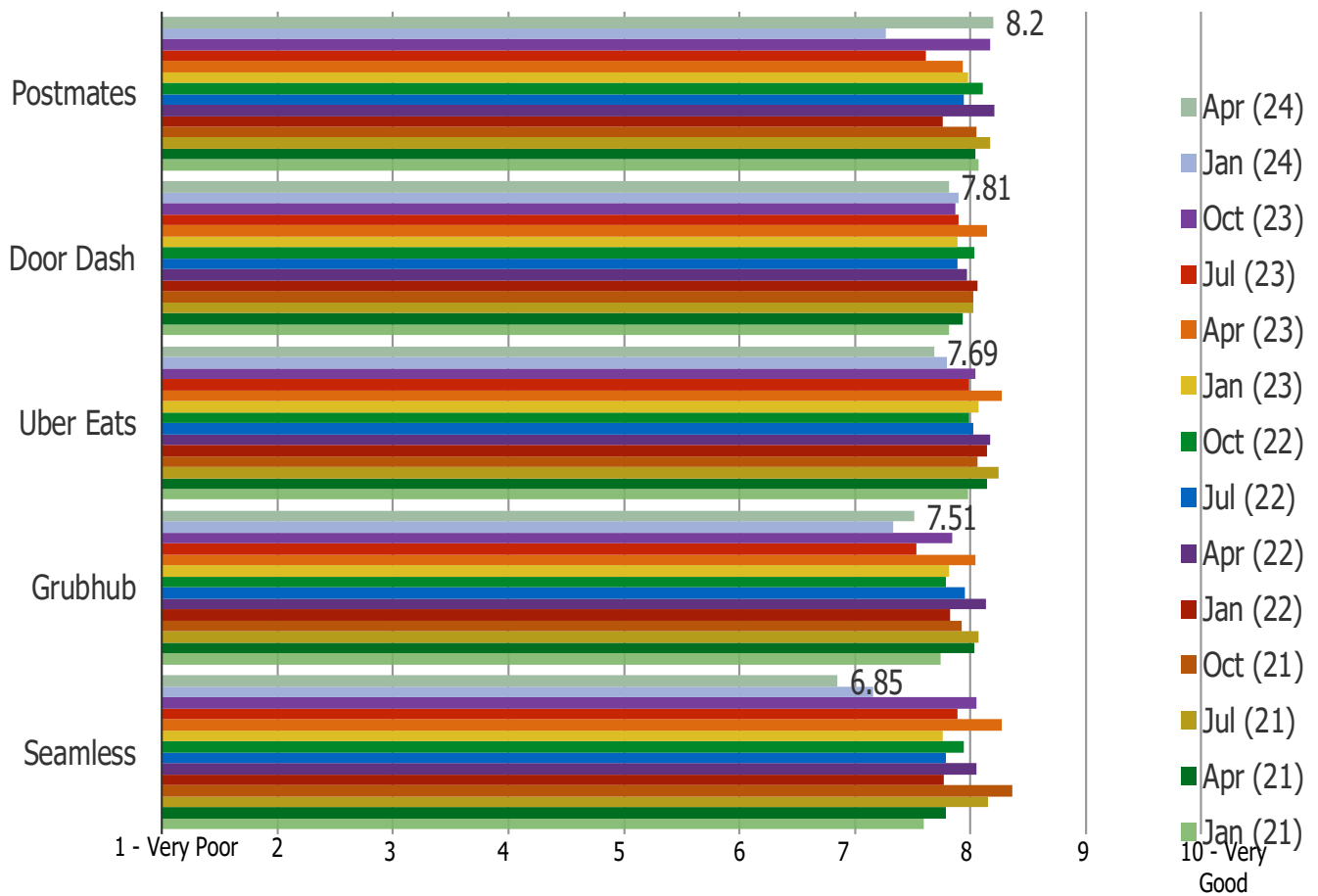
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	317
Door Dash	438
Seamless	39
Grubhub	202
Postmates	61
Instacart	131

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

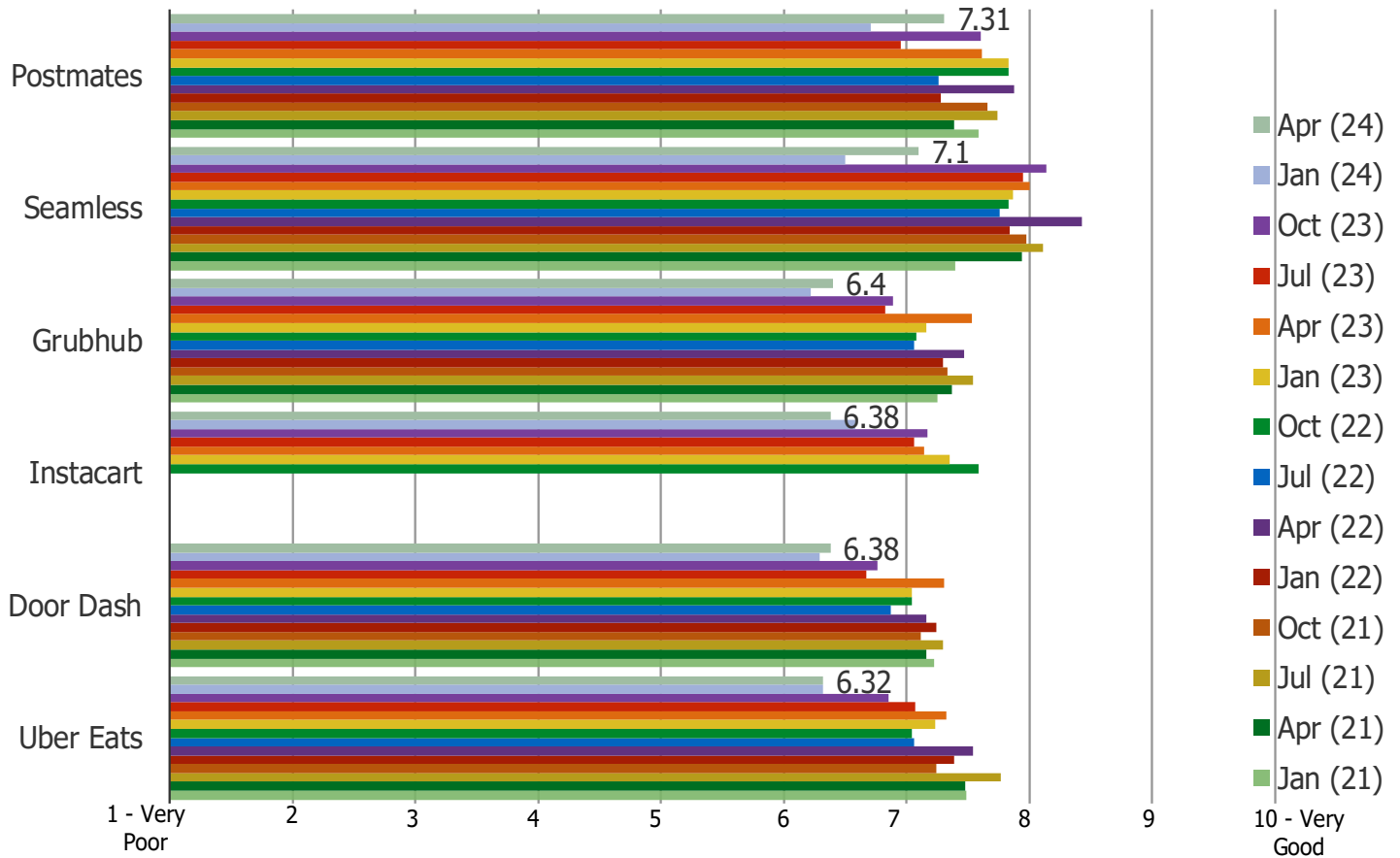
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	317
Door Dash	438
Seamless	39
Grubhub	202
Postmates	61

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

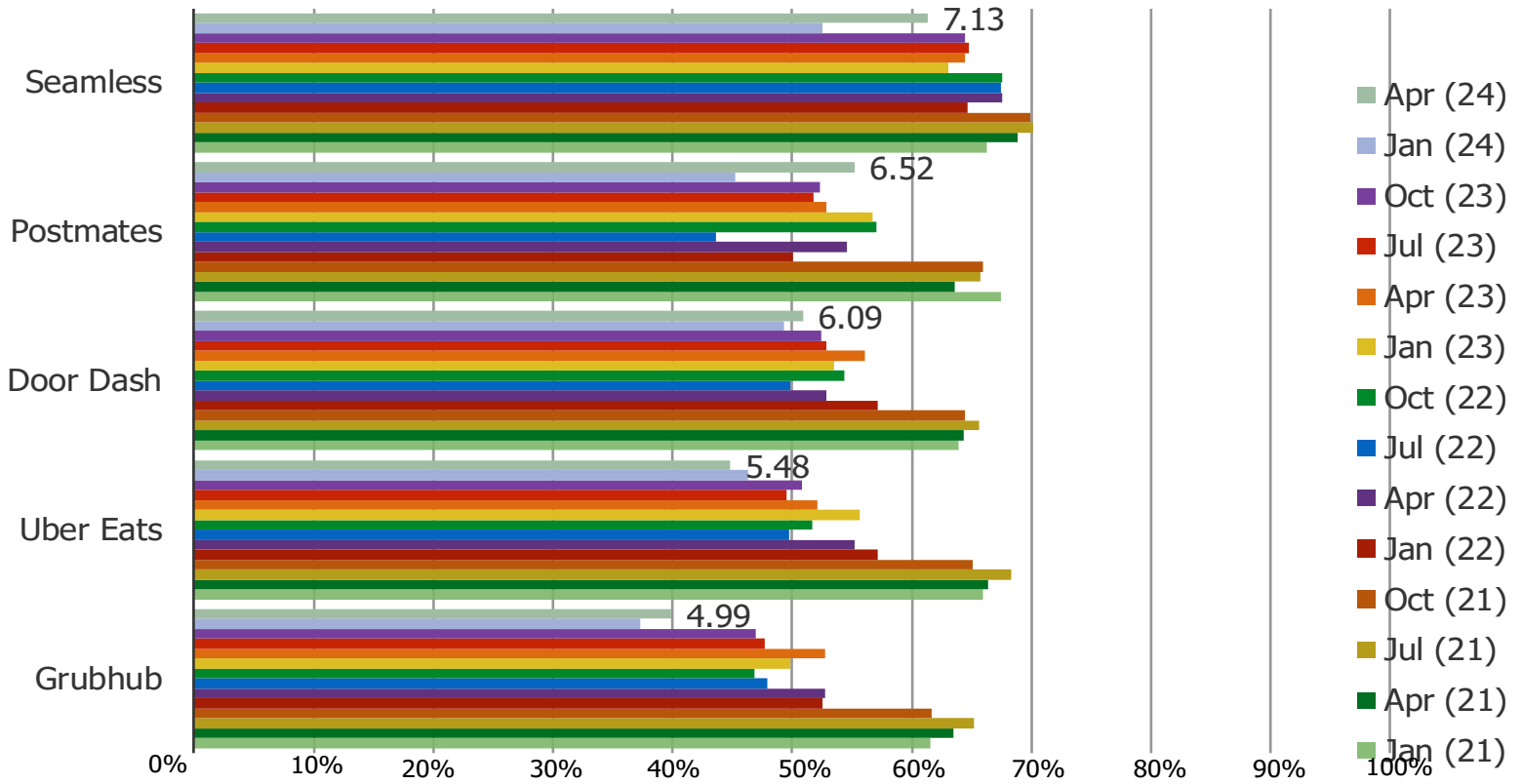
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	317
Door Dash	438
Seamless	39
Grubhub	202
Postmates	61
Instacart	131

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

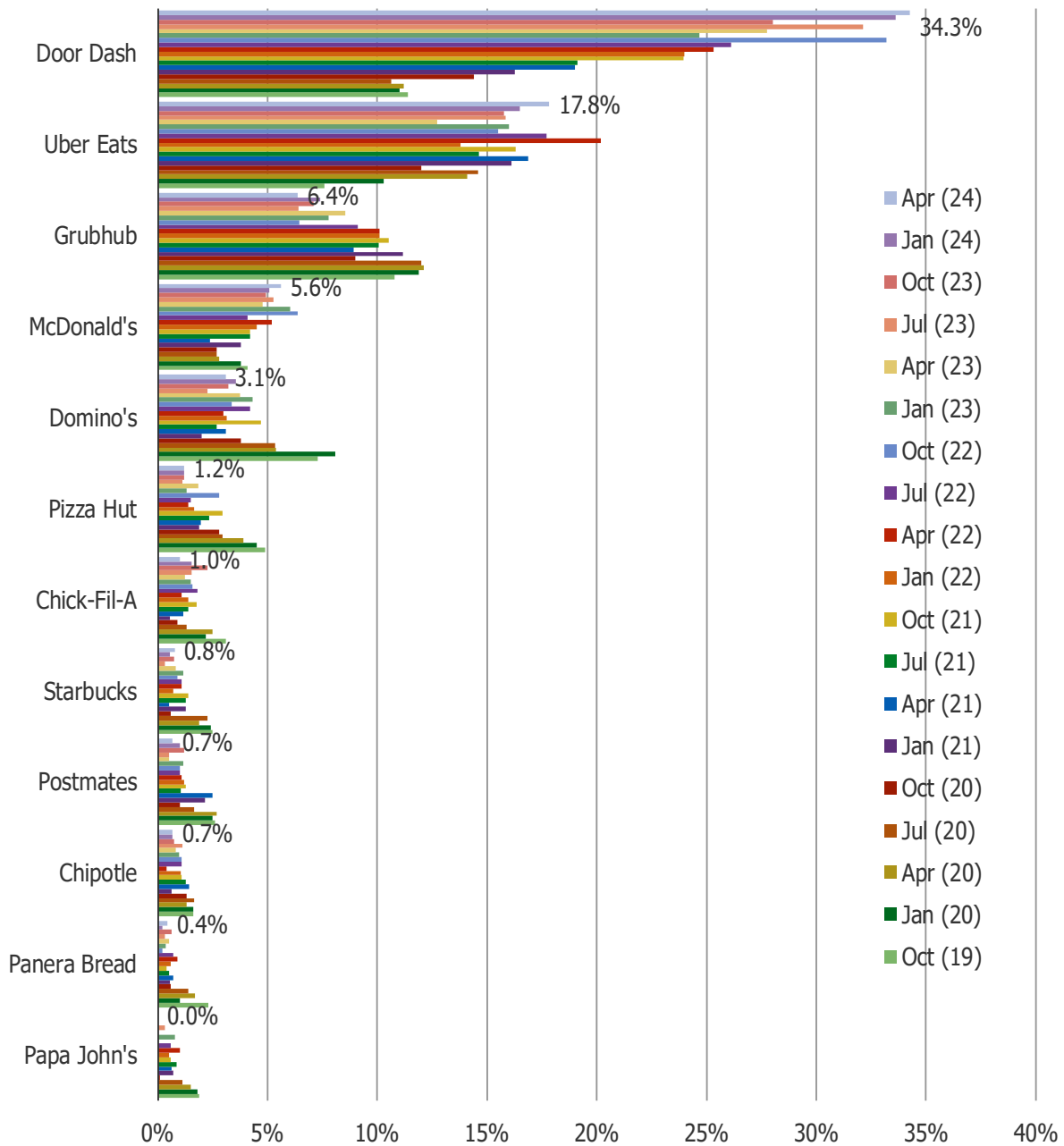
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	317
Door Dash	438
Seamless	39
Grubhub	202
Postmates	61

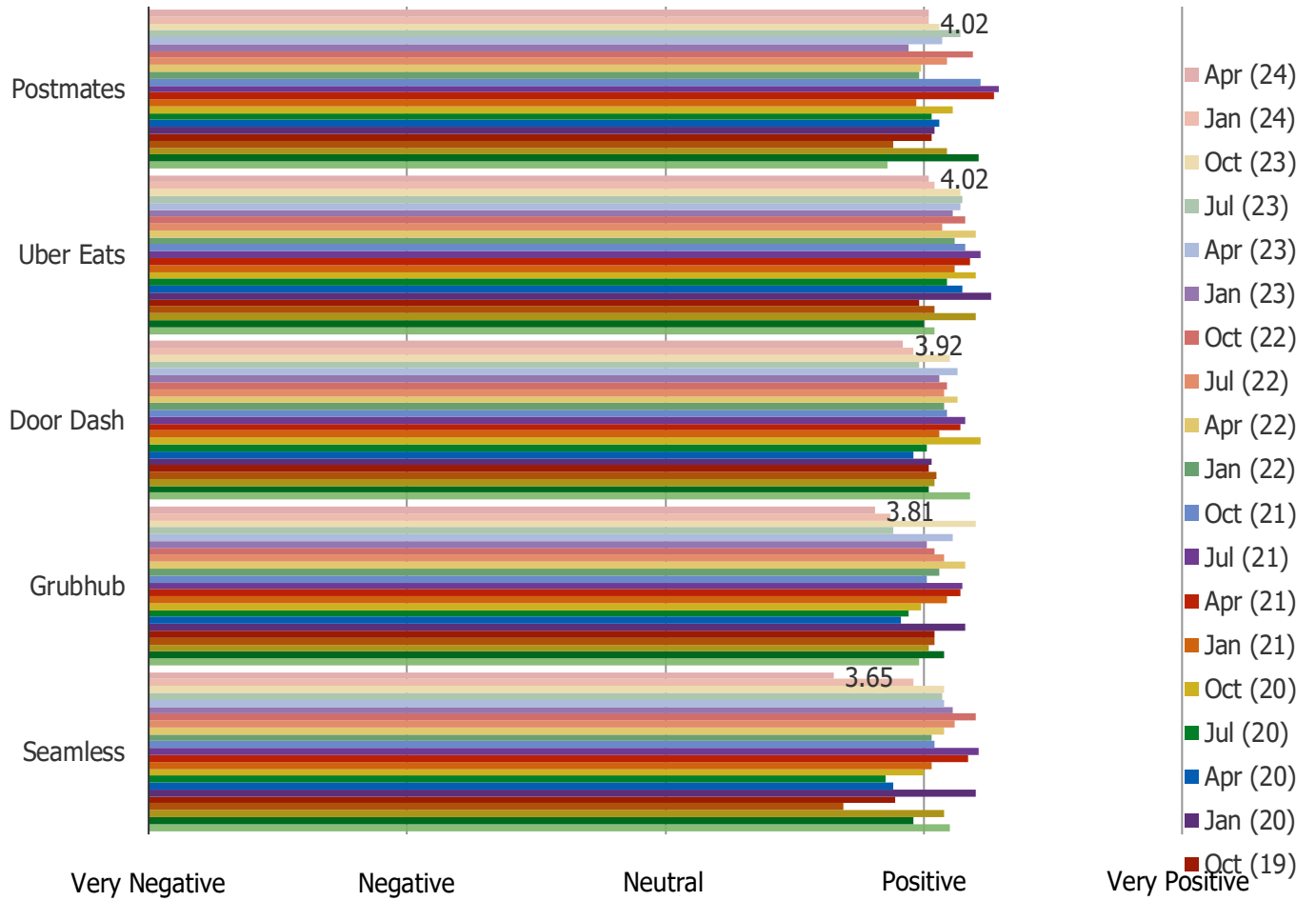
WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



WHAT IS YOUR OPINION OF THE PLATFORM?

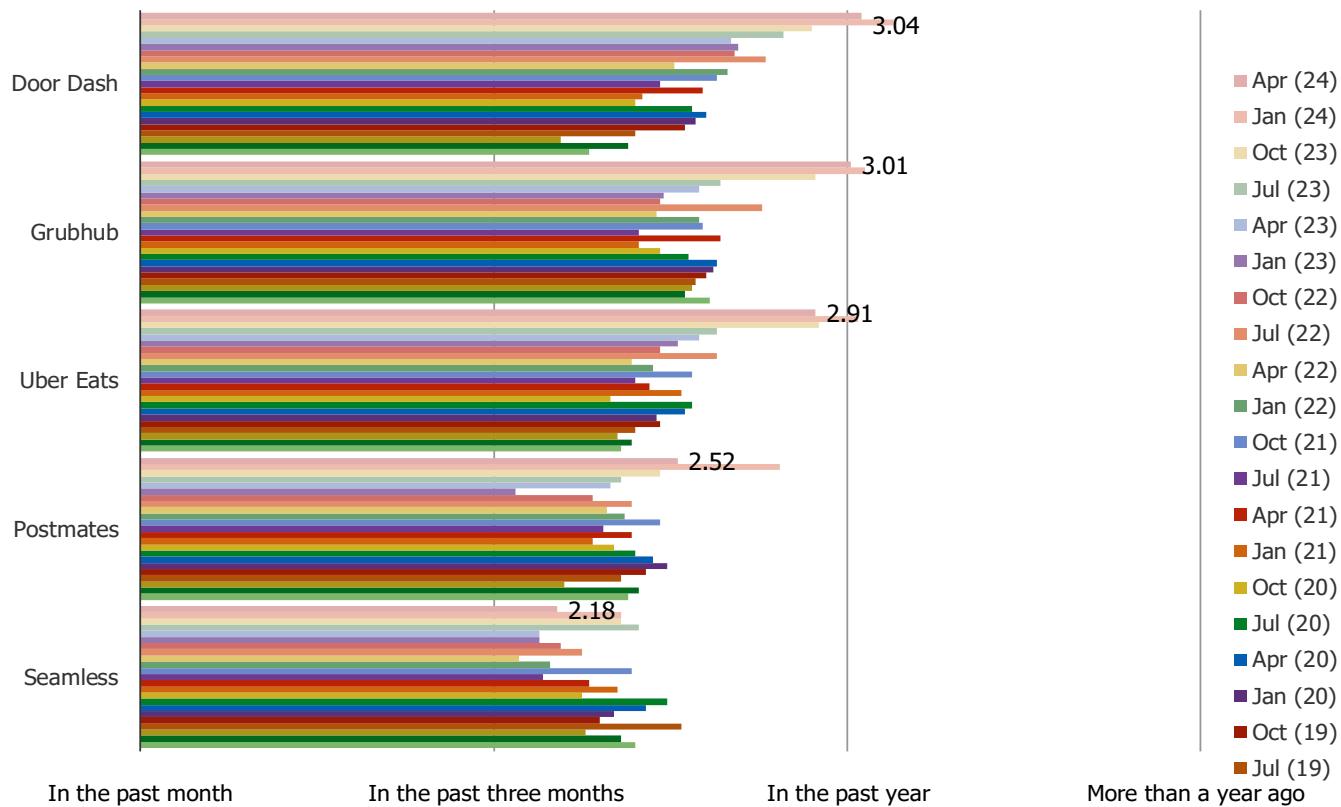
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

WHEN DID YOU FIRST START USING THIS PLATFORM?

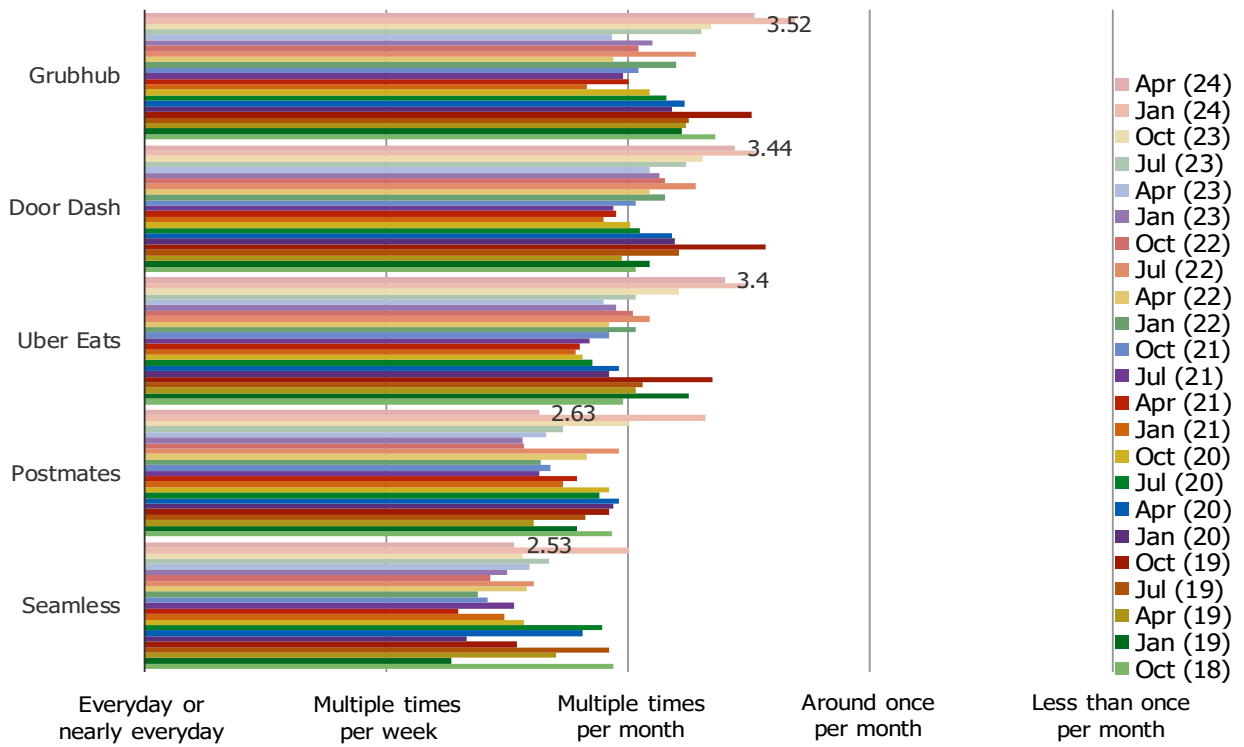
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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

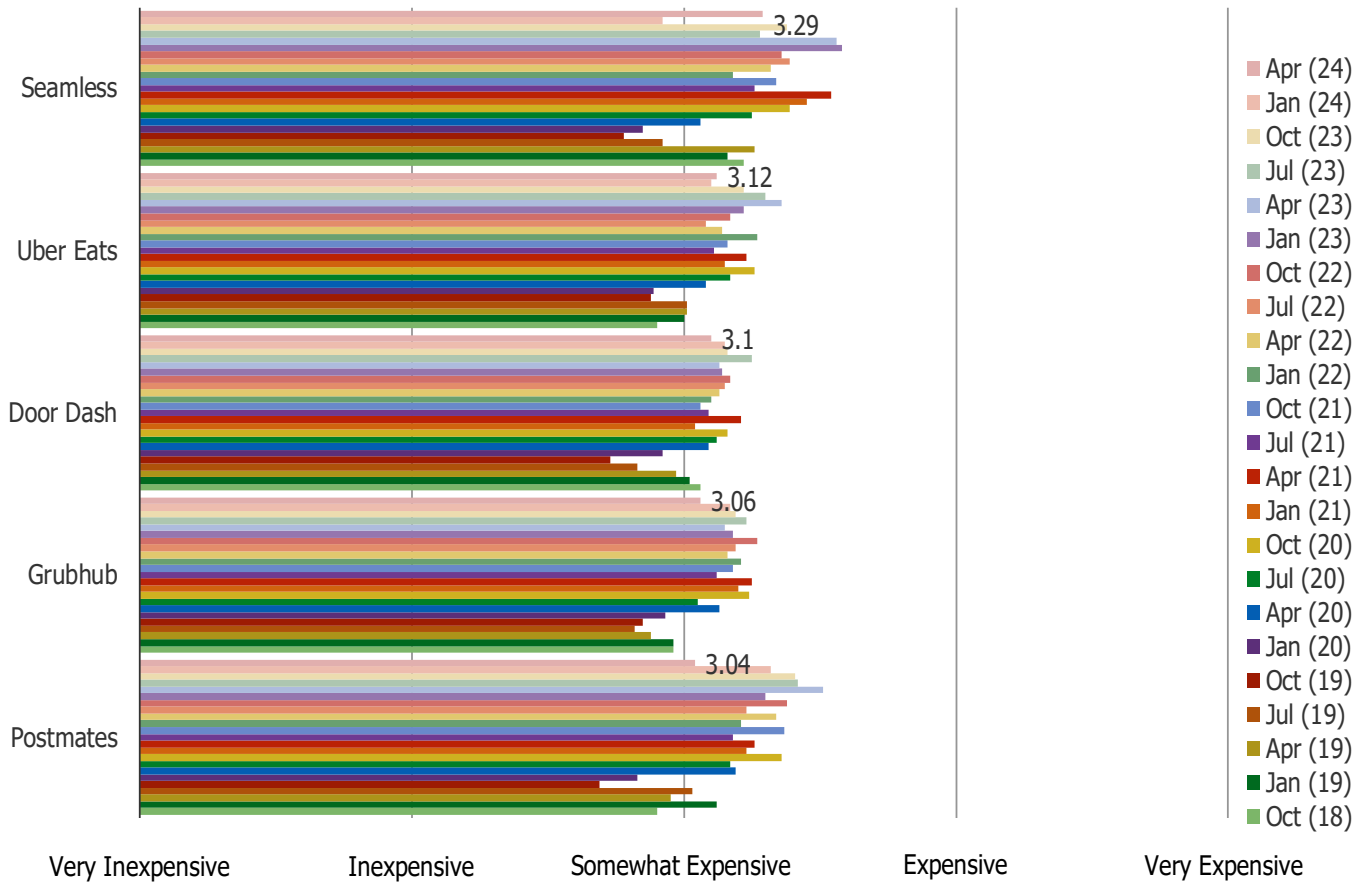


More Frequent

	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

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

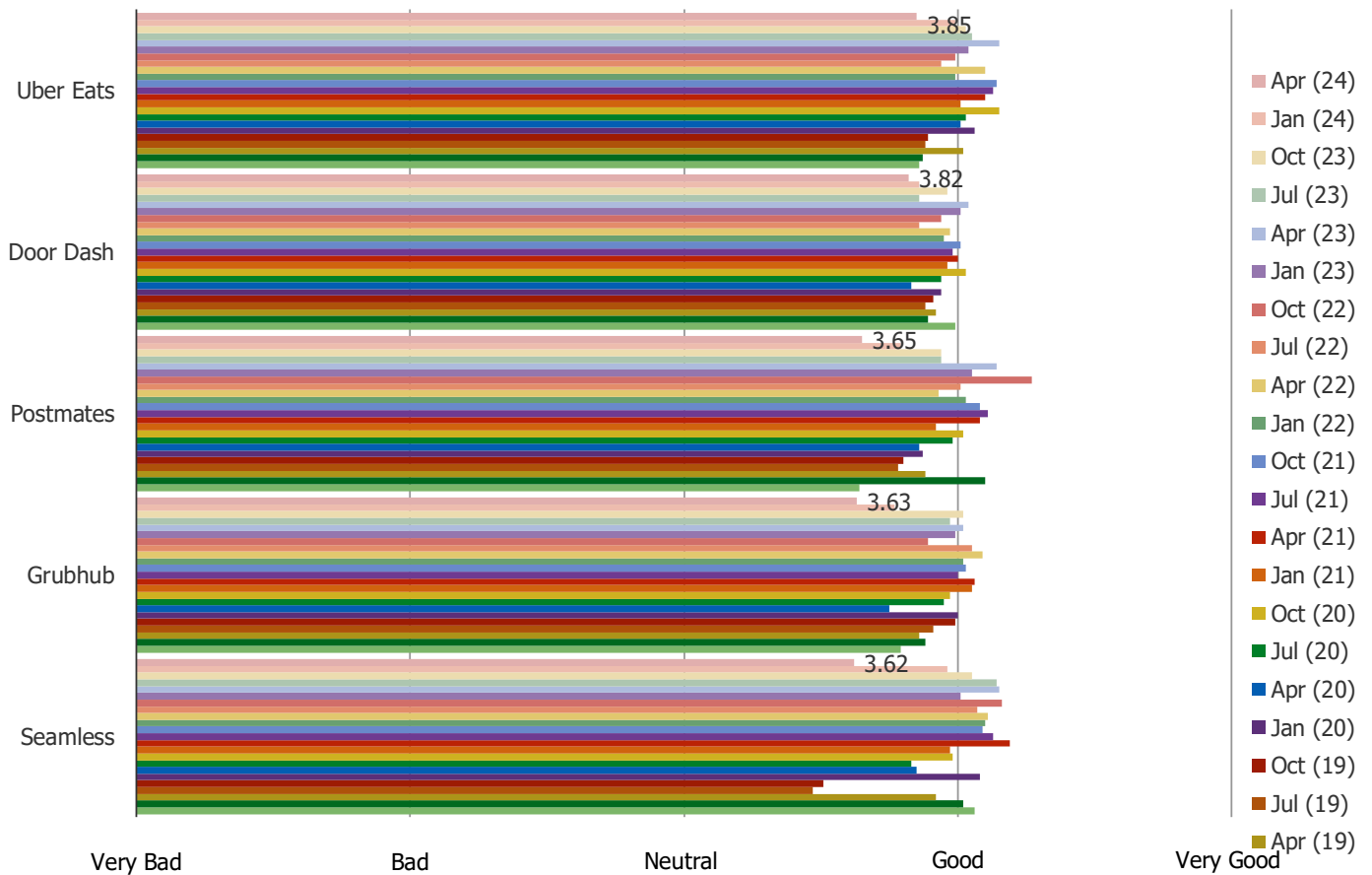
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

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

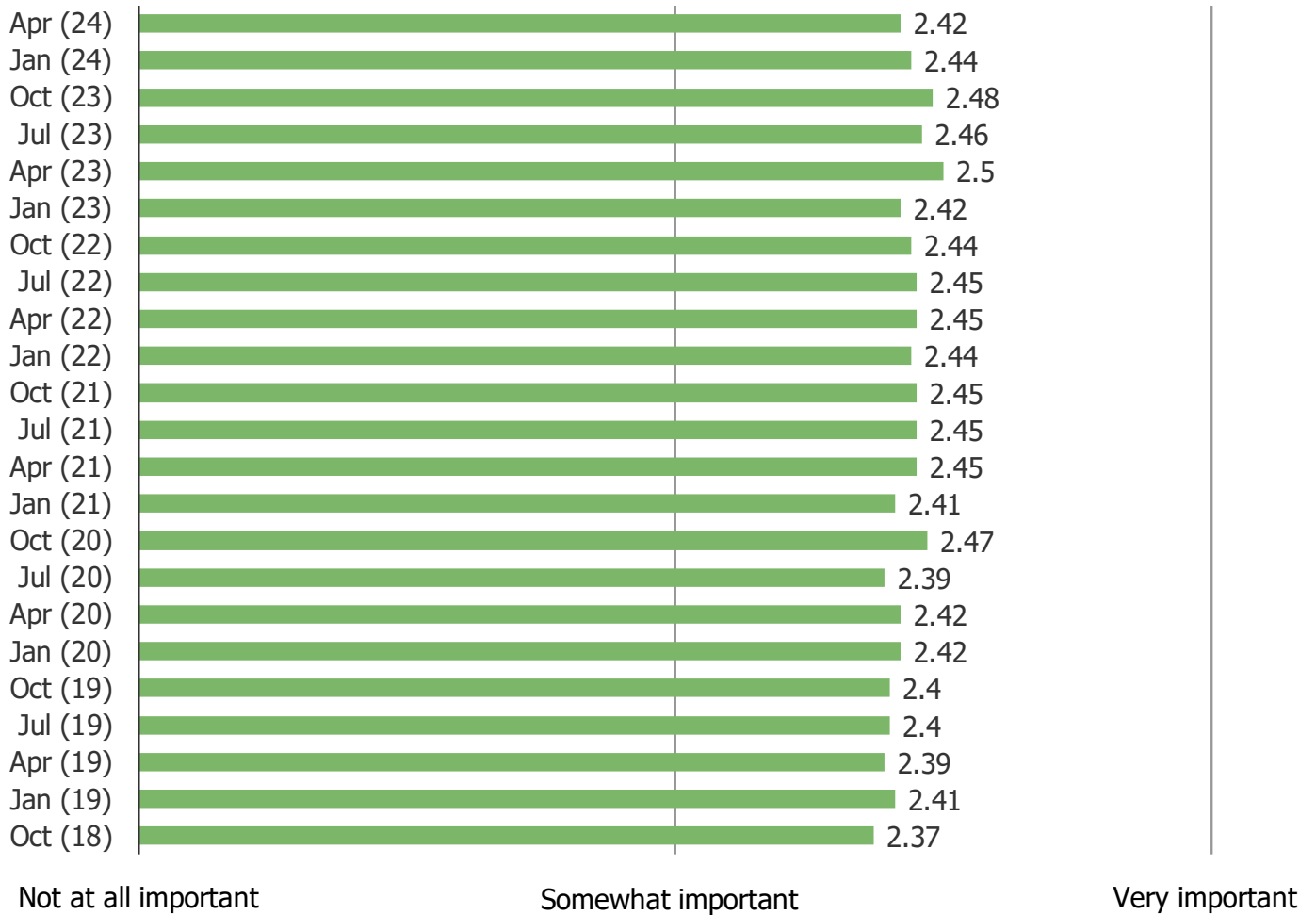
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	266
Door Dash	436
Seamless	34
Grubhub	172
Postmates	54

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.

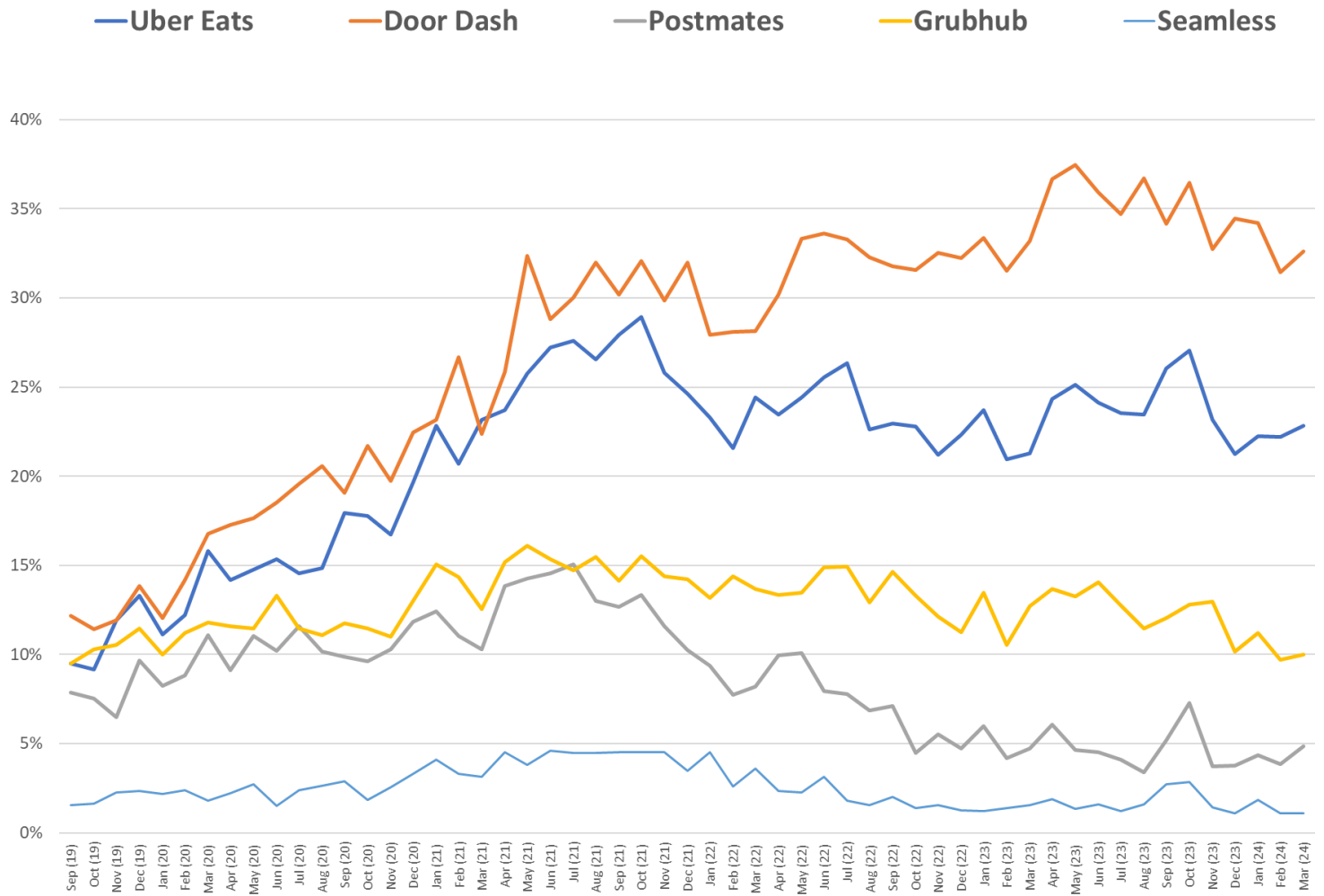


Food Delivery Apps

MONTHLY DATA

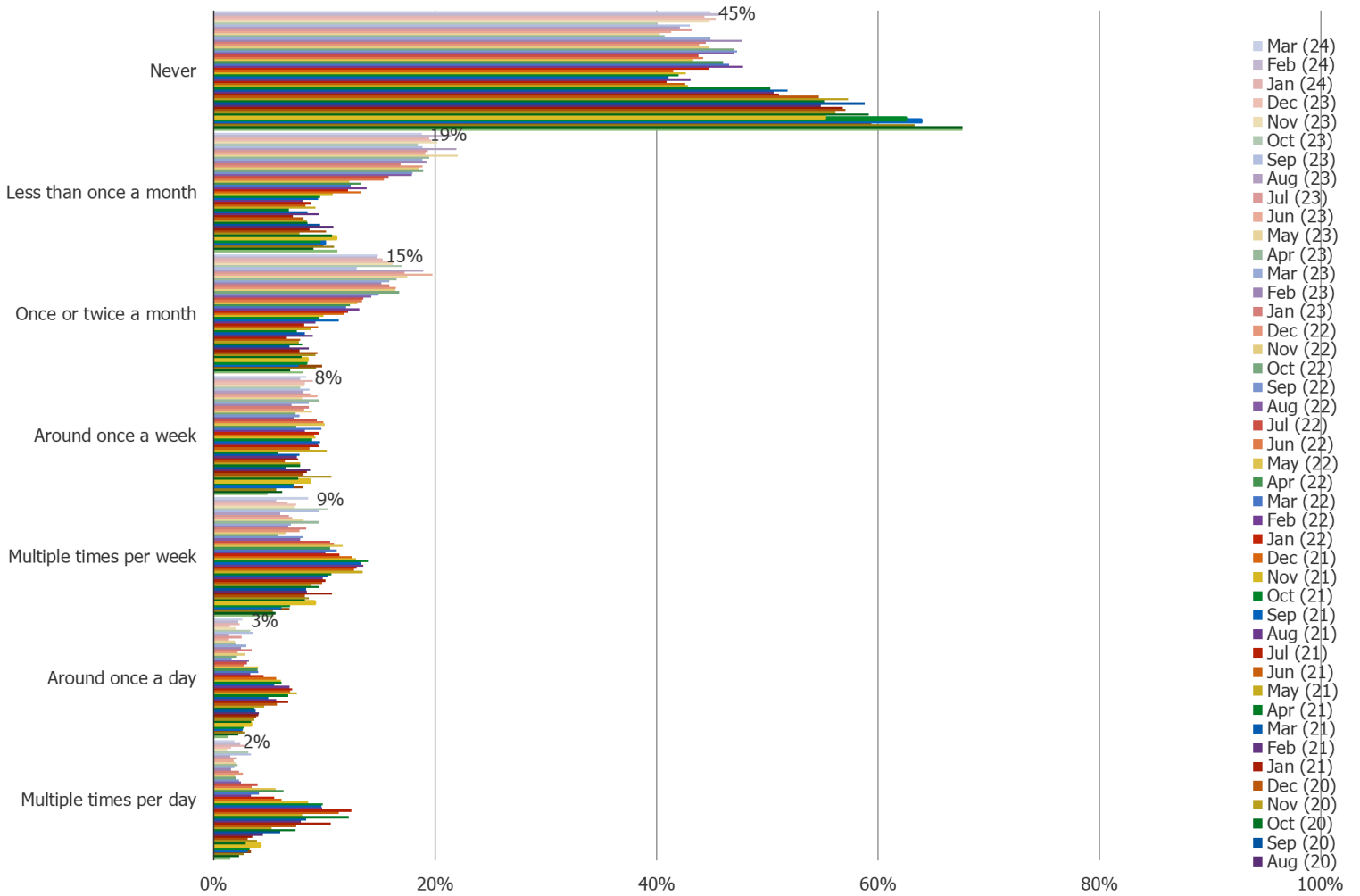
DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.



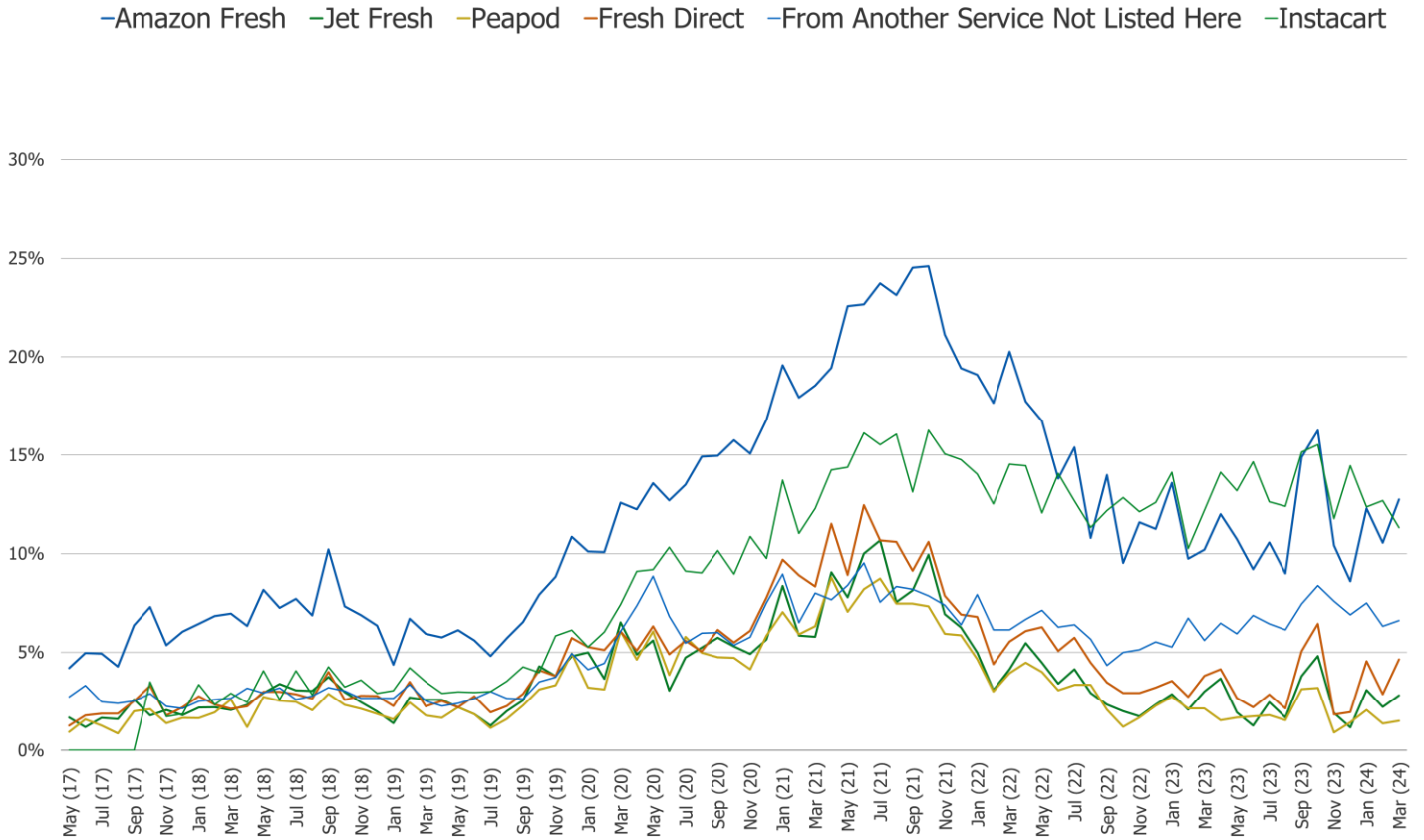
HOW OFTEN DO YOU USE FOOD DELIVERY APPS?

Posed to all respondents.



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

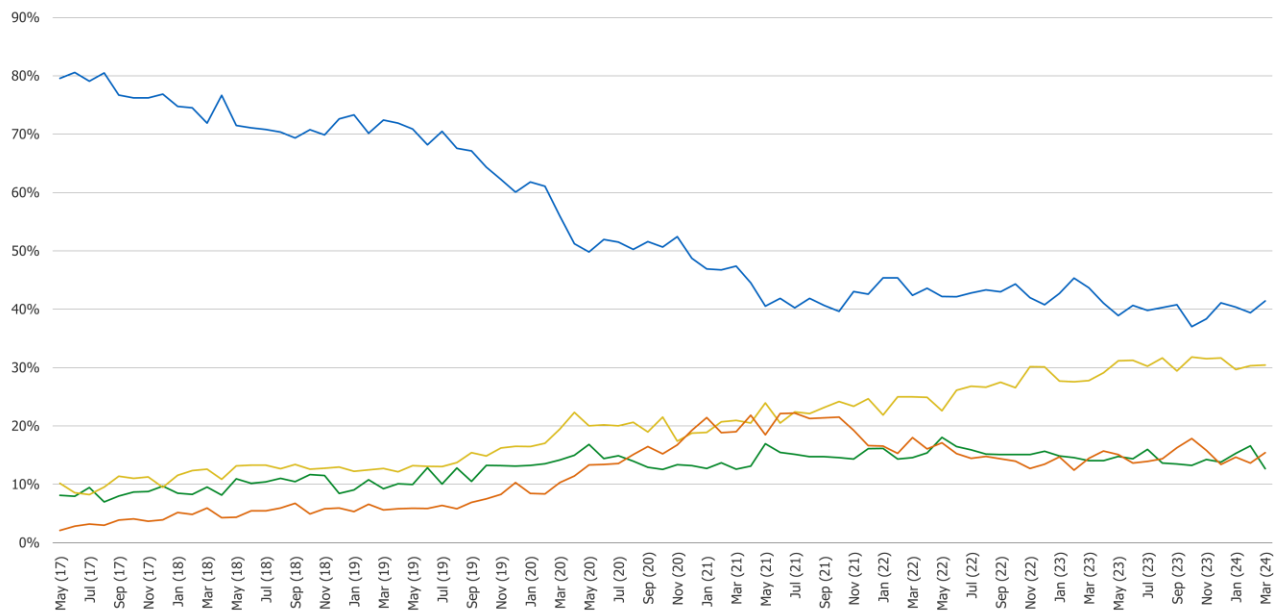
Posed to all respondents.



PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING GROCERIES ONLINE:

Posed to all respondents.

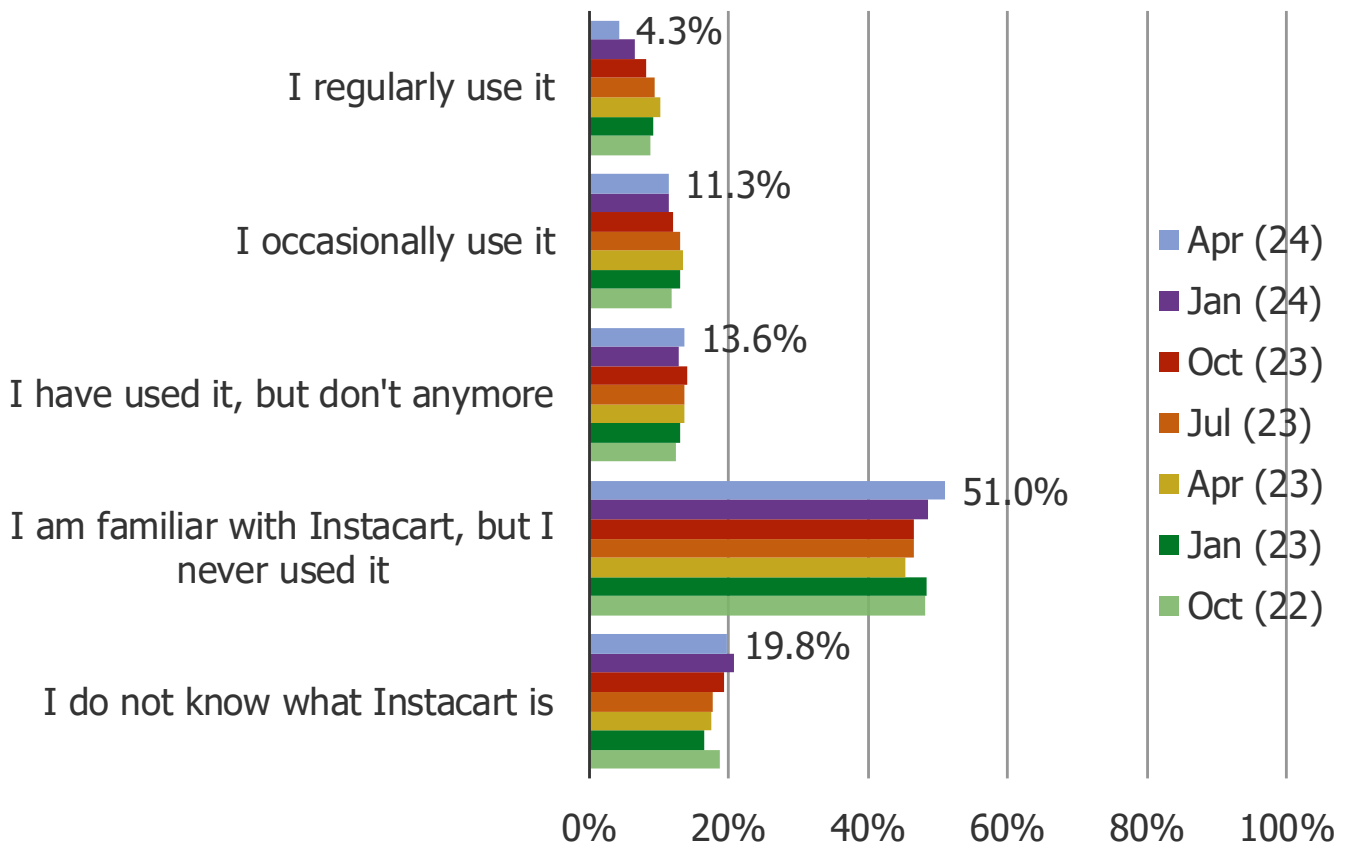
- I have never ordered groceries online
- I order groceries online occasionally
- I ordered groceries online once, but not again since
- I order groceries online regularly



INSTACART DEEPER DIVE

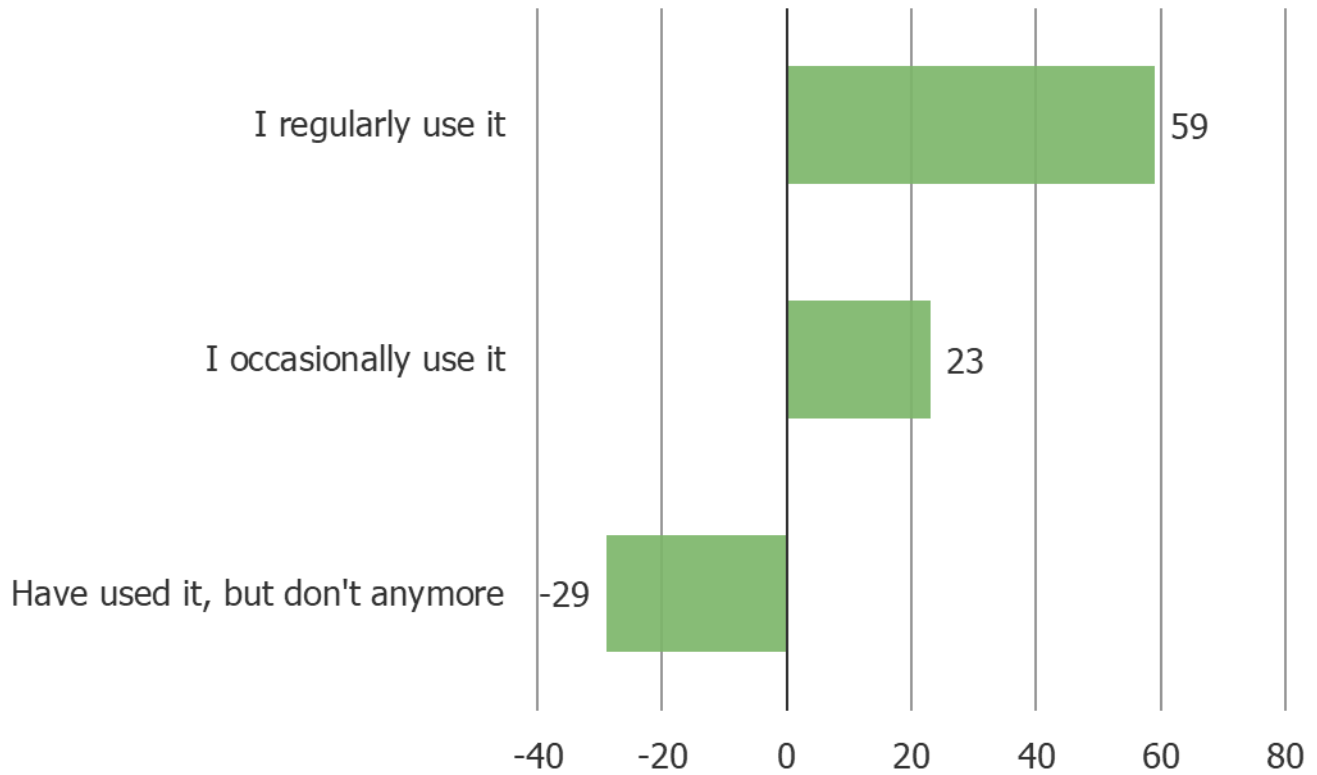
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

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.



Combining waves from the past 12 months to achieve larger N sizes...

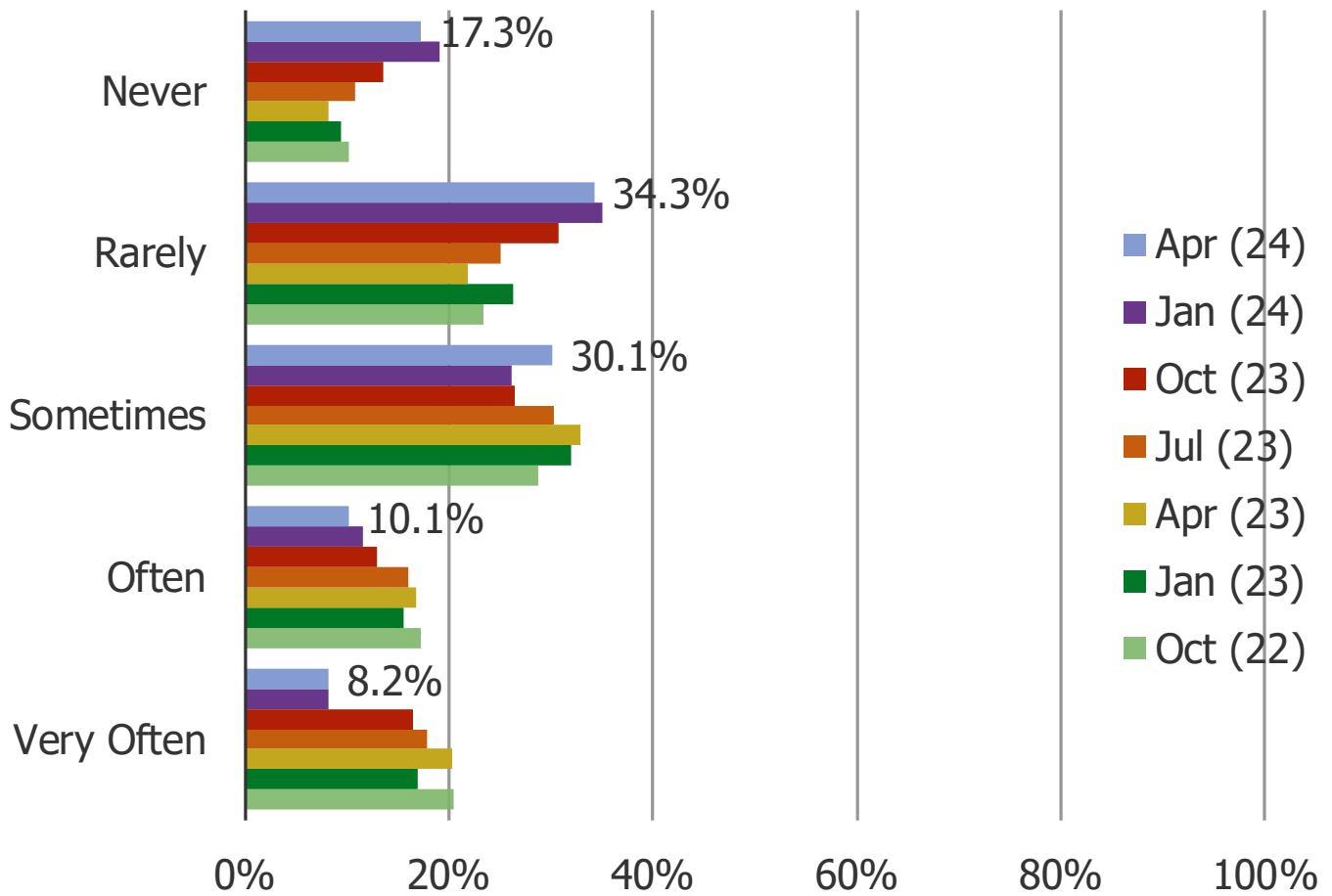
Have used it, but don't anymore: N = 844

I occasionally use it: N = 764

I regularly use it: N = 479

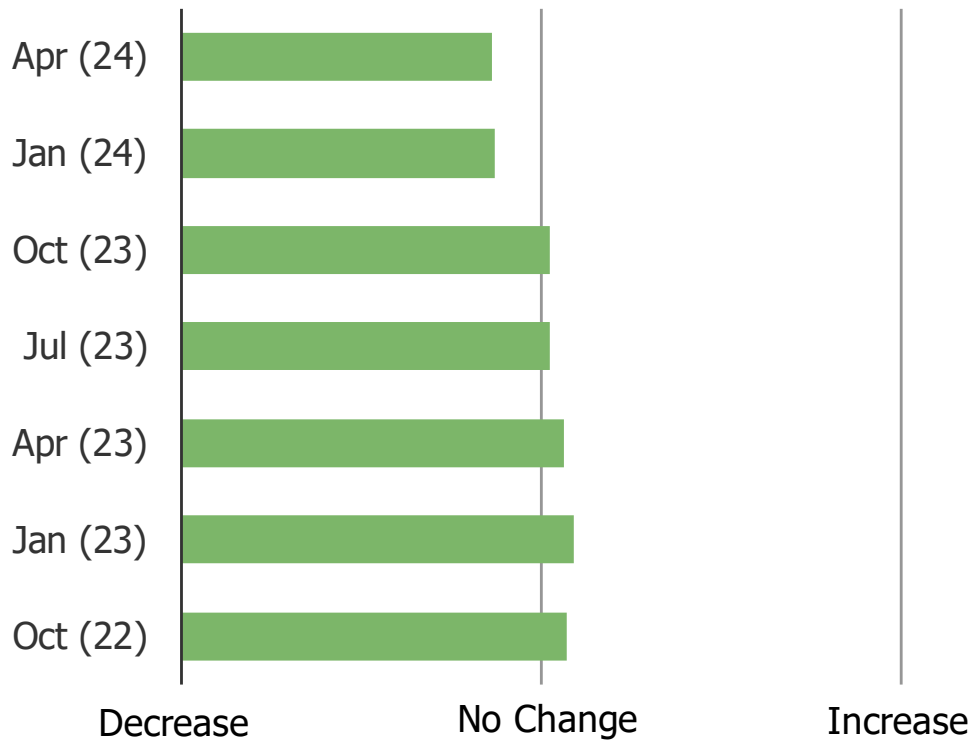
HOW OFTEN DO YOU USE INSTACART?

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 = 365)



April 2024 Data

