

Bespoke Survey Research

July 2024

Food Delivery

Volume 32 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: UBER, DASH, GRUB, CART.

Key Takeaways:

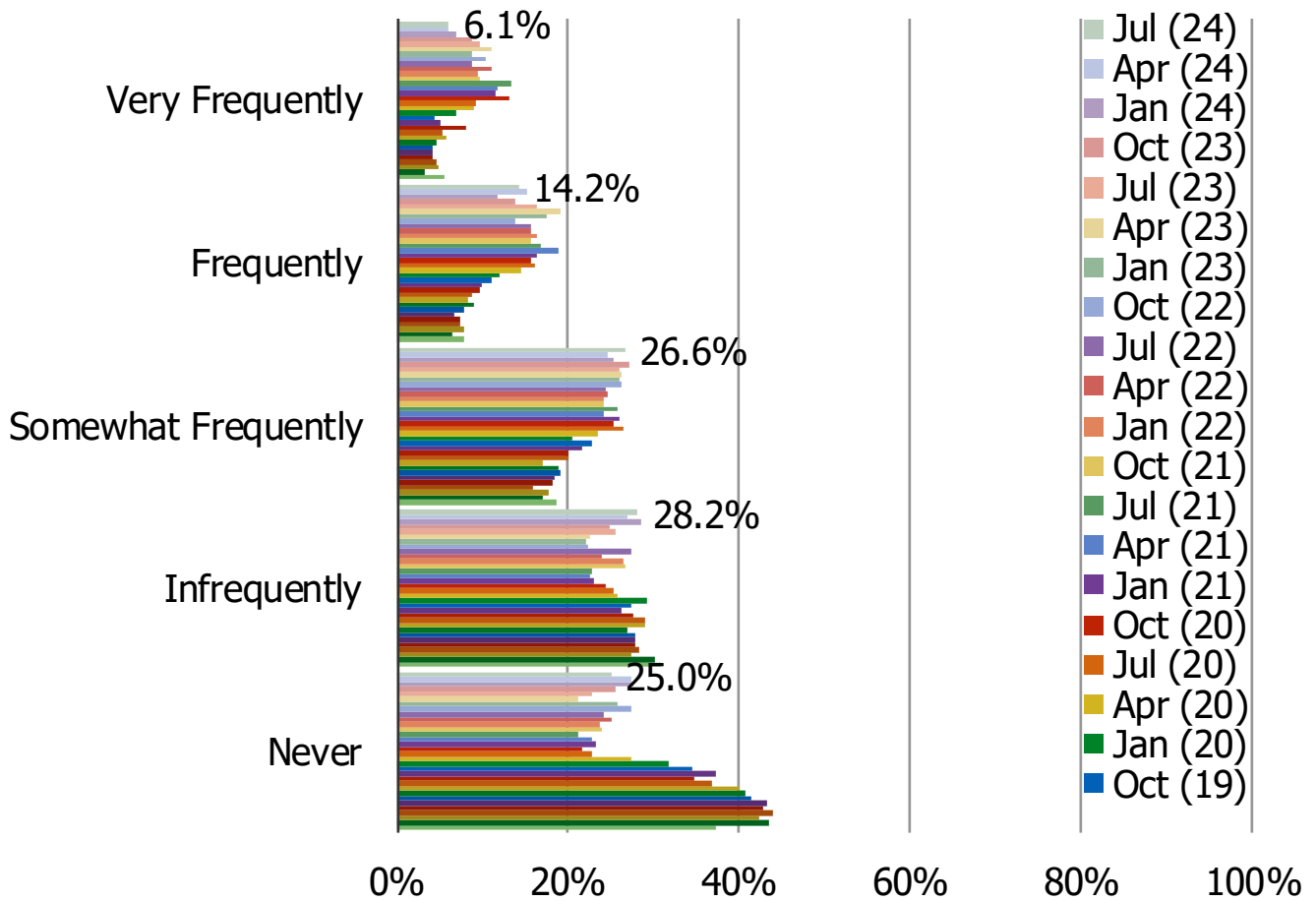
- Food delivery app usage has stabilized to improved after a period of declines.
- Among those who use both Uber Eats and DoorDash, a higher share prefers to use DoorDash vs. Uber Eats if they could only choose one to use.
- DoorDash continues to be the top platform that consumers use, followed by Uber Eats (consistent with prior checks).
- DoorDash has made notable market share gains throughout the history of our survey. IE – the share of DoorDash users who ALSO use other food delivery app options has been in decline, and the share of users of other food delivery app options who also use DoorDash has increased.
- NPS of Instacart among regular and occasional users has strengthened q/q.
- The share who use Instacart regularly has increased slightly sequentially.
- Respondents are increasingly being driven by price / costs when choosing food delivery apps.

Food Delivery Apps

FOOD DELIVERY

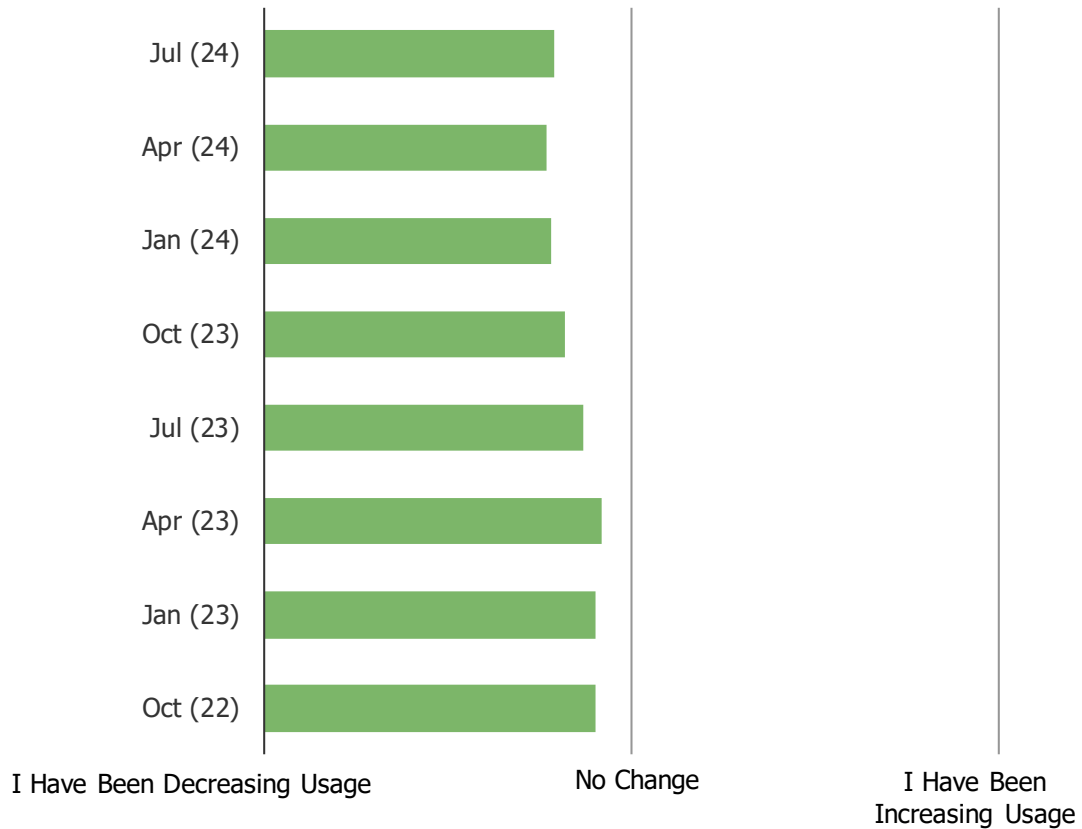
HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



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

Posed to respondents who use food delivery apps.

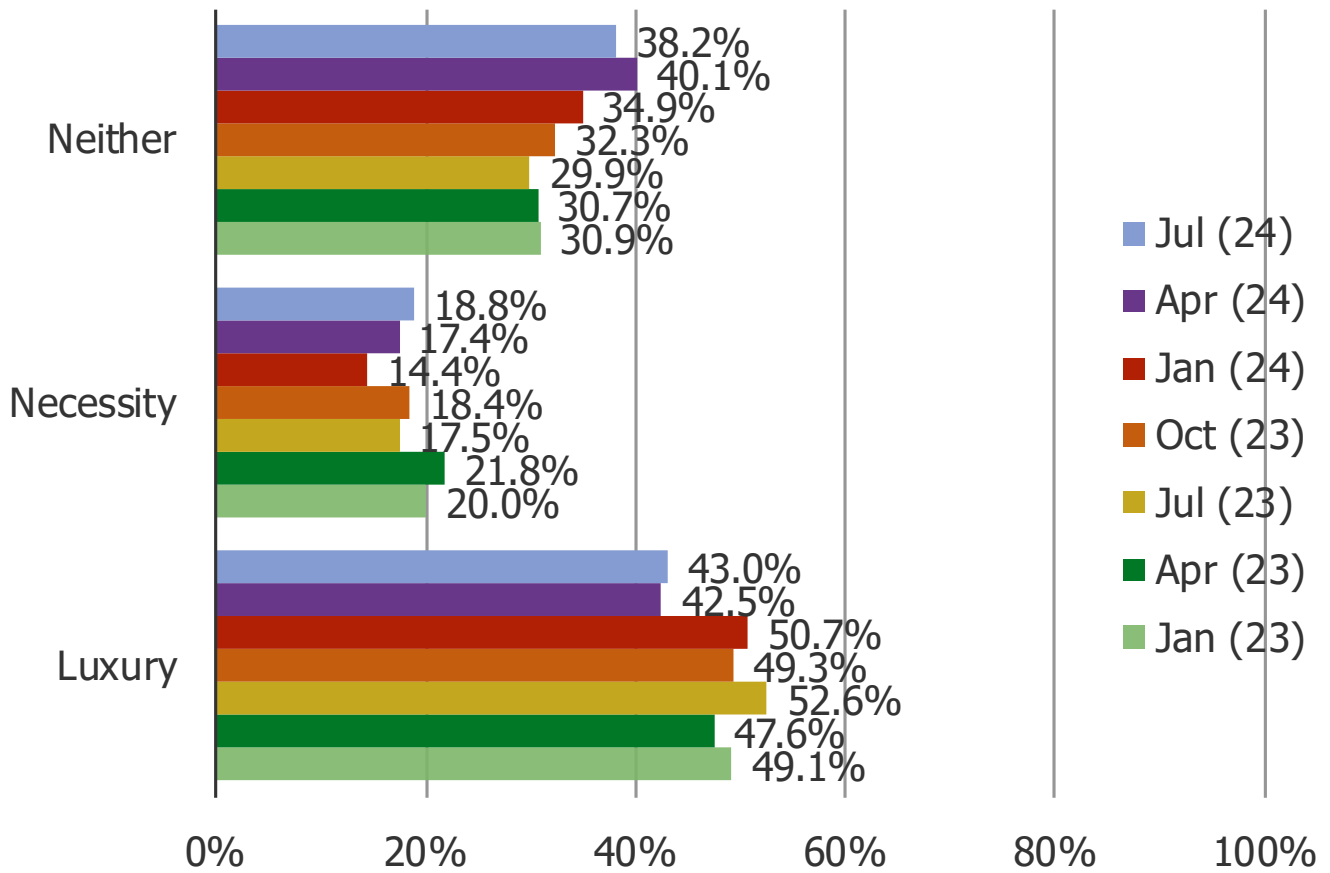


Optional Comments:



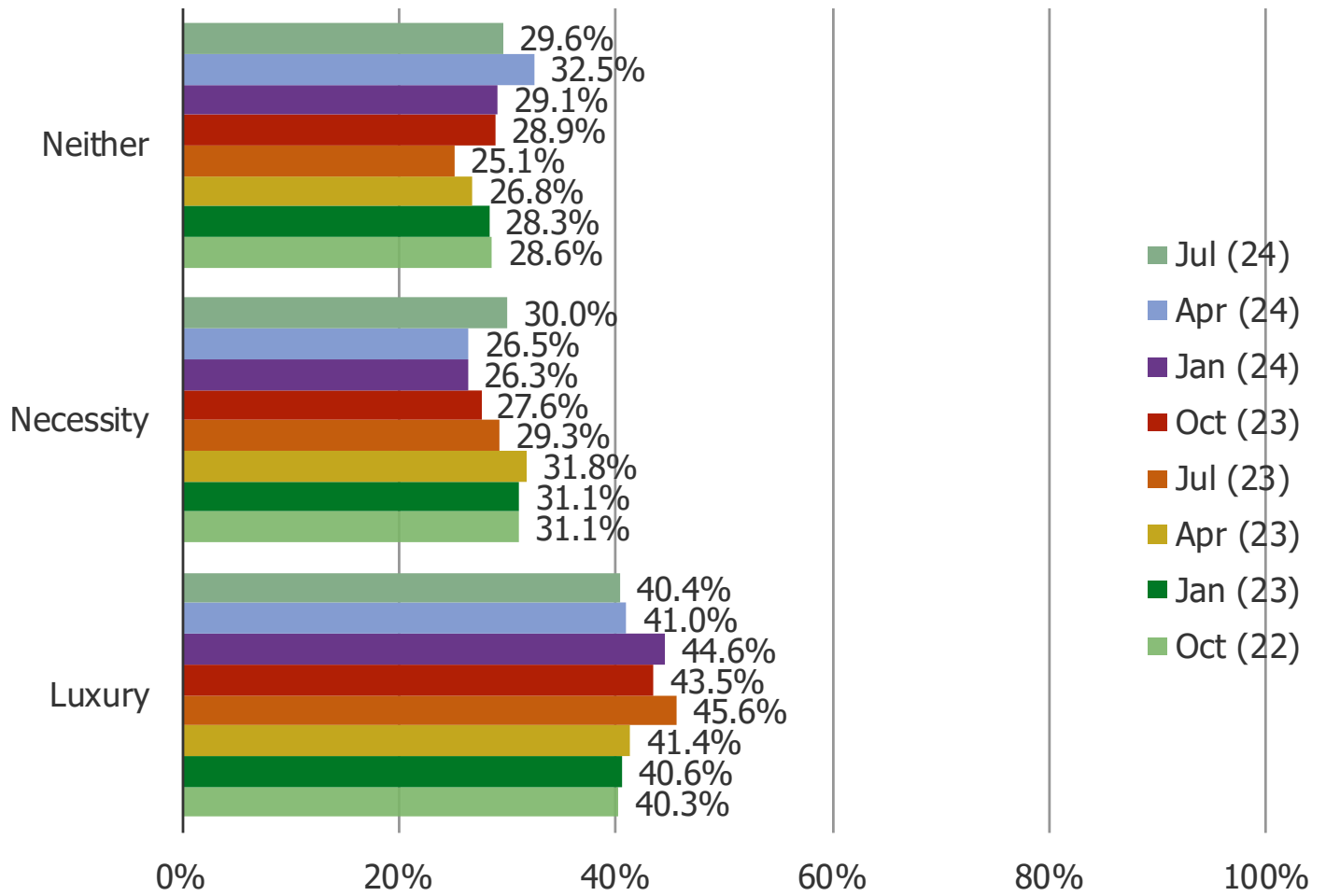
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.



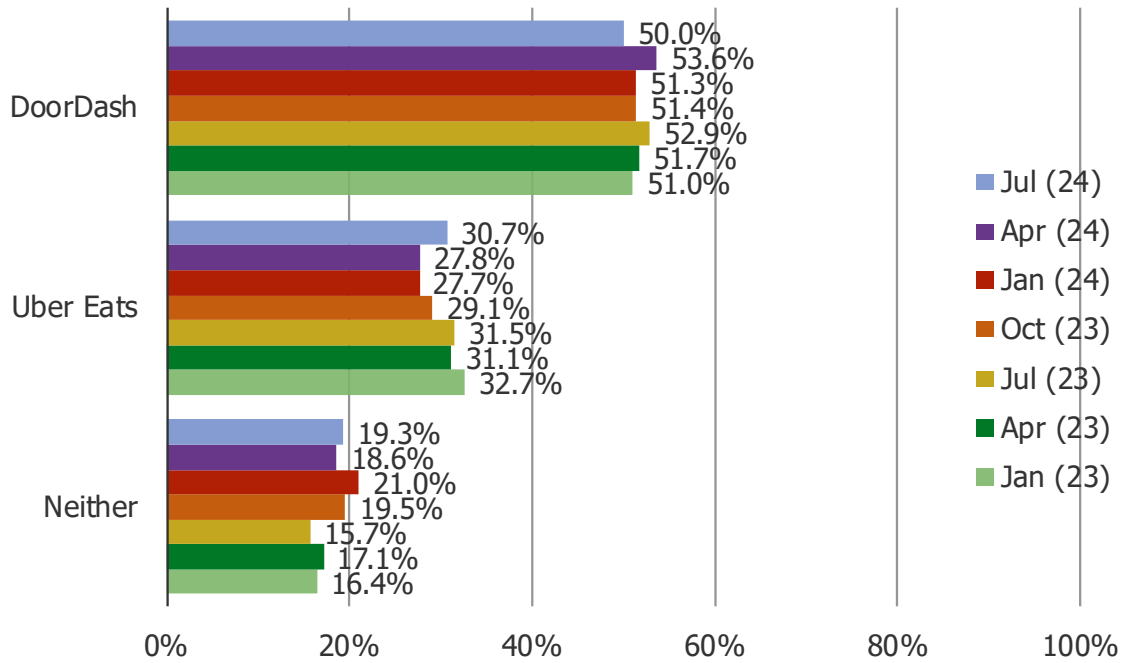
DO YOU VIEW GROCERY DELIVERY AS MORE OF A...

Posed to all respondents.

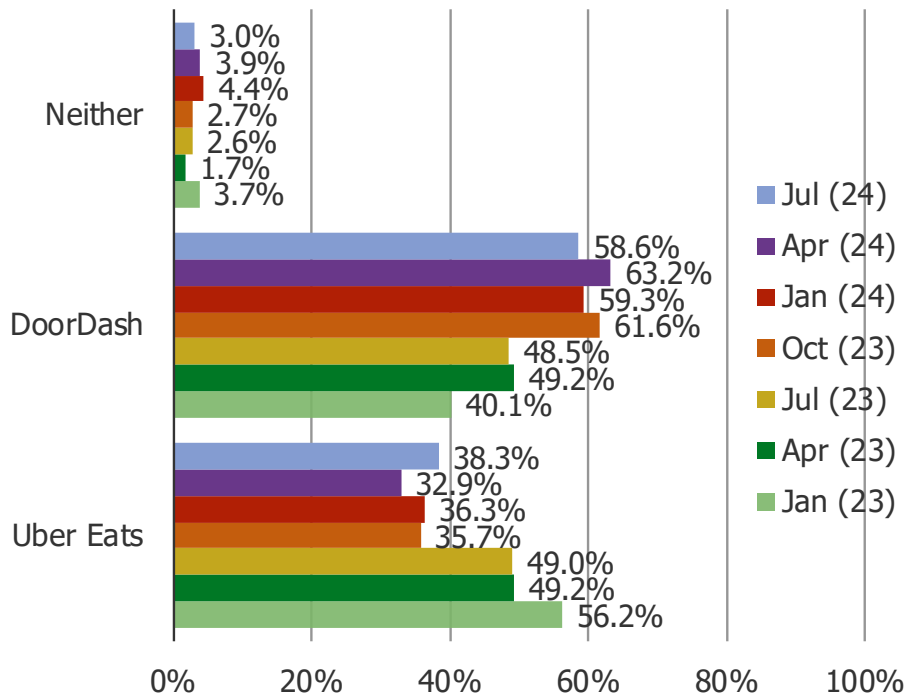


IF YOU HAD TO CHOOSE ONLY ONE OF THESE TO USE, WHICH WOULD YOU PICK?

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

Top Reasons for Preference:

1. **Familiarity and Experience:**
 - Many users prefer DoorDash simply because they are more familiar with it or have been using it for a long time. This comfort and habit lead to a natural preference.
 - Examples: "Been using it for so long.", "It's the one I use the most because it has more food choices.", "I'm more familiar with this app."
2. **Better Deals and Promotions:**
 - Users frequently mention that DoorDash offers better deals, promotions, and savings compared to Uber Eats.
 - Examples: "I chose DoorDash because they offer better deals and savings.", "They have good deals to get lower delivery fees."
3. **Selection of Restaurants:**
 - A significant number of users feel that DoorDash has a better selection of restaurants in their area.
 - Examples: "It has a better selection of places you can order from.", "Better selection in my area."
4. **Ease of Use and User Experience:**
 - The ease of navigating the DoorDash app and overall user experience are frequently highlighted.
 - Examples: "Because is very easy to use.", "Easy to use, has many options."
5. **Service Quality and Reliability:**
 - Users perceive DoorDash as more reliable with better service quality, including timely deliveries and fewer mistakes.
 - Examples: "Fast service.", "Most reliable.", "Great service."
6. **Delivery Speed:**
 - Fast delivery times are a recurring theme in the preferences for DoorDash.
 - Examples: "Fastest.", "They have the fastest delivery time."
7. **Customer Service:**
 - Good customer service experiences with DoorDash are frequently mentioned.
 - Examples: "Their customer service is excellent.", "Great communication and always make sure I am satisfied with my order."
8. **Lower Fees:**
 - Users often mention that DoorDash has lower delivery fees compared to Uber Eats.
 - Examples: "It has low delivery fees and it's very fast.", "The cheaper fees."
9. **Promotions and Memberships:**
 - Features like DashPass and other promotional benefits are appealing to users.
 - Examples: "I have the dash pass.", "I have a dash pass so no delivery fees on certain restaurants."
10. **Trust and Reliability:**
 - Users express a general trust in DoorDash's reliability and consistency.
 - Examples: "I trust and believe DoorDash will deliver my food promptly.", "Because I know how to use and find the good restaurants."

Additional Insights:

- **Negative Experiences with Uber Eats:**
 - Several users mention having had negative experiences with Uber Eats, which contributes to their preference for DoorDash.
 - Examples: "I've had negative experiences with Uber Eats.", "Uber eats didn't have some restaurants I wanted."
- **Exclusive Availability:**
 - In some cases, DoorDash is the only available option in the user's area, leading to a default preference.
 - Examples: "It's the only one that will come here!", "Only one that's offered in my area."
- **Technical Issues with Uber Eats:**
 - Users have reported technical and account issues with Uber Eats, making them lean towards DoorDash.
 - Examples: "I've had a ton of account/technical issues with Uber Eats."

Summary:

The preference for DoorDash over Uber Eats is driven by a combination of familiarity, better deals and promotions, a wider selection of restaurants, ease of use, and superior service quality and reliability. Fast delivery times, good customer service, lower fees, and positive past experiences also play significant roles. Negative experiences with Uber Eats and the exclusive availability of DoorDash in certain areas further contribute to this preference.

PREFERS DOORDASH OVER UBER EATS, WHY?

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

Top Reasons for Preference:

1. Familiarity and Experience:

- Many users prefer Uber Eats because they are more familiar with it or have been using it for a long time. This comfort and established habit lead to a preference for Uber Eats.
- Examples: "I'm familiar with it", "I've had more of a great experience with this app than any other", "Been using them for a while".

2. Better Deals and Promotions:

- Users frequently mention that Uber Eats offers better deals, promotions, and savings compared to DoorDash.
- Examples: "You get more coupons and deals", "They have the best promotions and deals".

3. Selection of Restaurants:

- A significant number of users feel that Uber Eats has a better selection of restaurants in their area.
- Examples: "It has the most restaurants", "Better restaurant selection and lots will deliver".

4. Ease of Use and User Experience:

- The ease of navigating the Uber Eats app and overall user experience are frequently highlighted.
- Examples: "Easy to use", "The app seems more user friendly".

5. Service Quality and Reliability:

- Users perceive Uber Eats as more reliable with better service quality, including timely deliveries and fewer mistakes.
- Examples: "Much better service than DoorDash", "More reliable and fast".

6. Lower Fees:

- Users often mention that Uber Eats has lower delivery fees compared to DoorDash.
- Examples: "Lowest fees", "Lower delivery fees".

7. Customer Service:

- Good customer service experiences with Uber Eats are frequently mentioned.
- Examples: "Great customer service", "Customer service is also great".

8. Delivery Speed:

- Fast delivery times are a recurring theme in the preferences for Uber Eats.
- Examples: "Fastest", "Because it is more fast".

9. Trust and Reliability:

- Users express a general trust in Uber Eats' reliability and consistency.
- Examples: "I trust them", "It has proven to be reliable".

10. Promotions and Memberships:

- Features like Uber One and other promotional benefits are appealing to users.
- Examples: "I have an Uber One membership that gets me no fees and free delivery", "Prime members can add One Medical membership and get 24/7 on-demand care for \$9/mo".

Additional Insights:

Negative Experiences with DoorDash:

- Several users mention having had negative experiences with DoorDash, which contributes to their preference for Uber Eats.
- Examples: "Have had bad experiences with DoorDash", "Too many bad experiences with DoorDash".

Exclusive Availability:

- In some cases, Uber Eats is the only available option in the user's area, leading to a default preference.
- Examples: "It's the only I can use in my town", "Only available to come to my house".

Technical Issues with DoorDash:

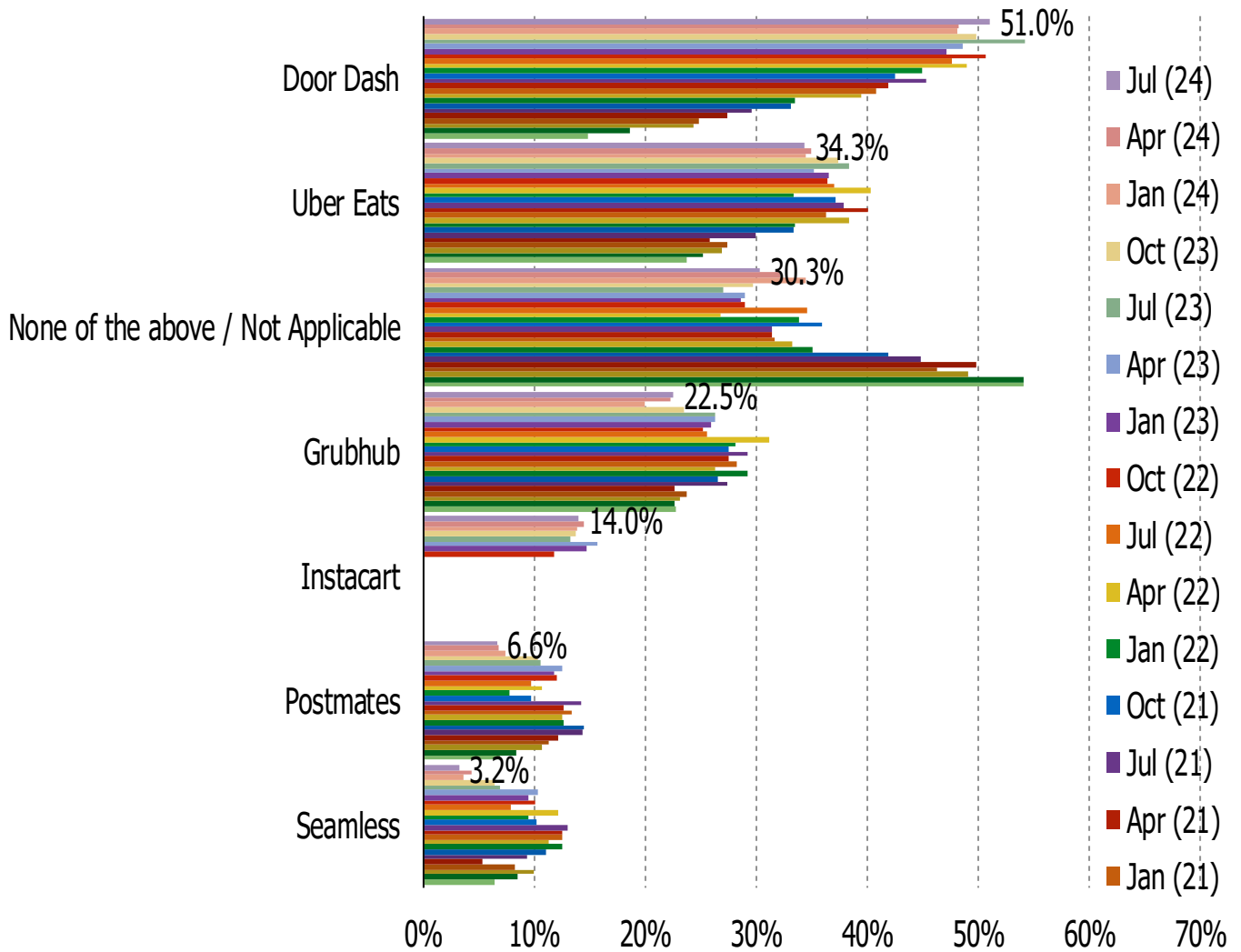
- Users have reported technical and account issues with DoorDash, making them lean towards Uber Eats.
- Examples: "DoorDash customer service is terrible and fees are higher".

Summary:

The preference for Uber Eats over DoorDash is driven by a combination of familiarity, better deals and promotions, a wider selection of restaurants, ease of use, and superior service quality and reliability. Fast delivery times, good customer service, lower fees, and positive past experiences also play significant roles. Negative experiences with DoorDash and the exclusive availability of Uber Eats in certain areas further contribute to this preference.

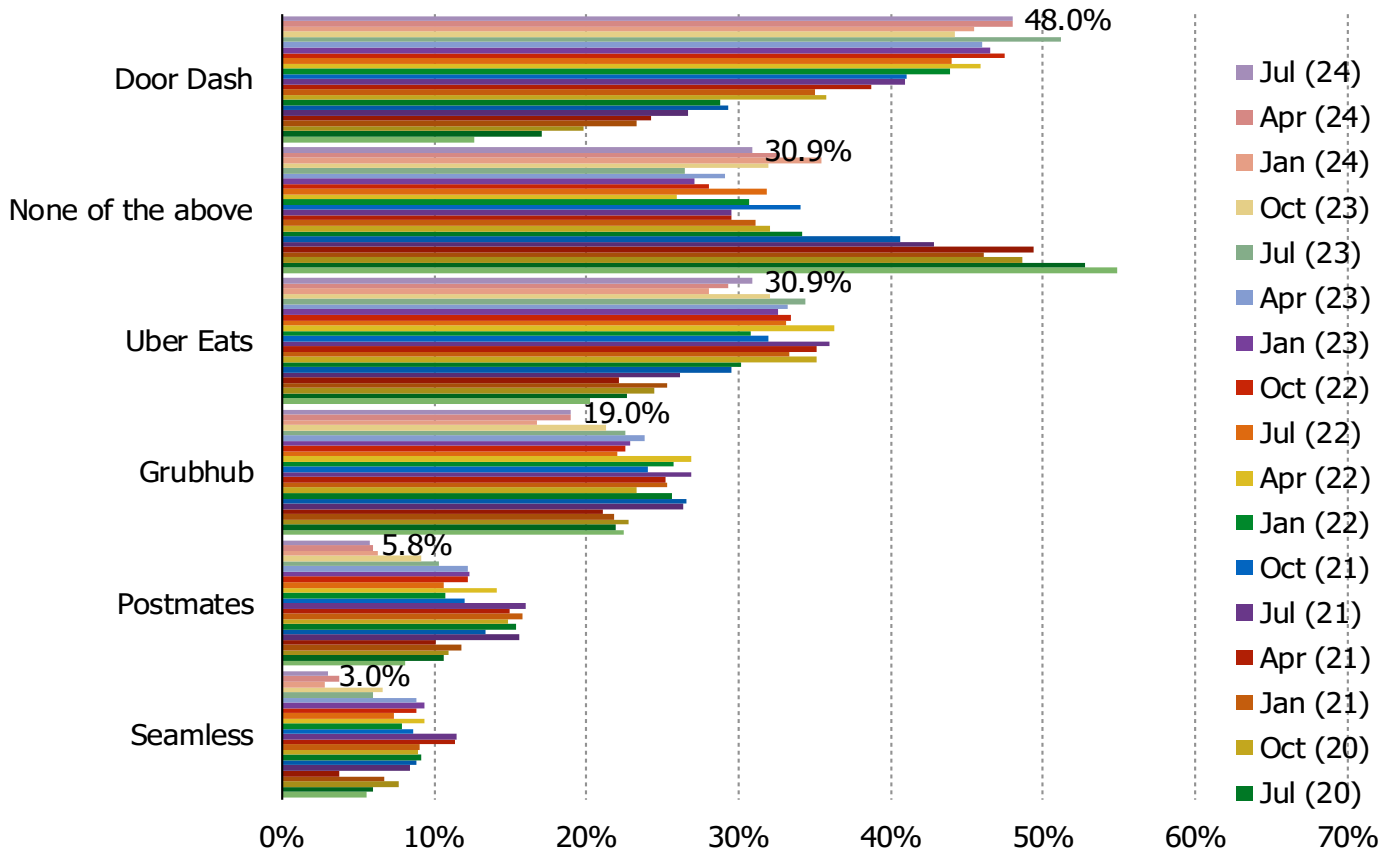
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.



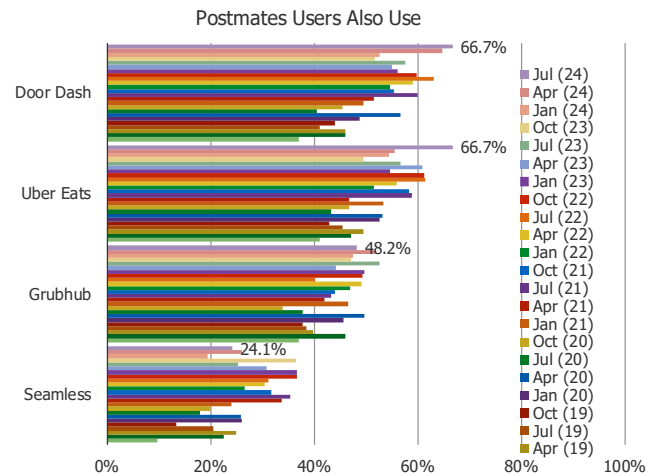
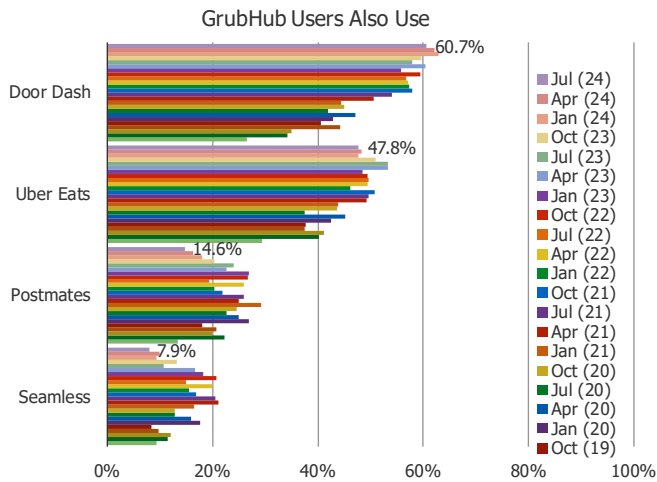
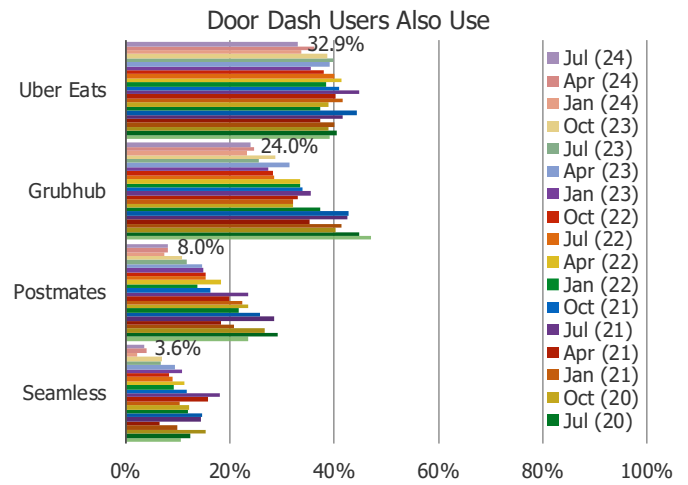
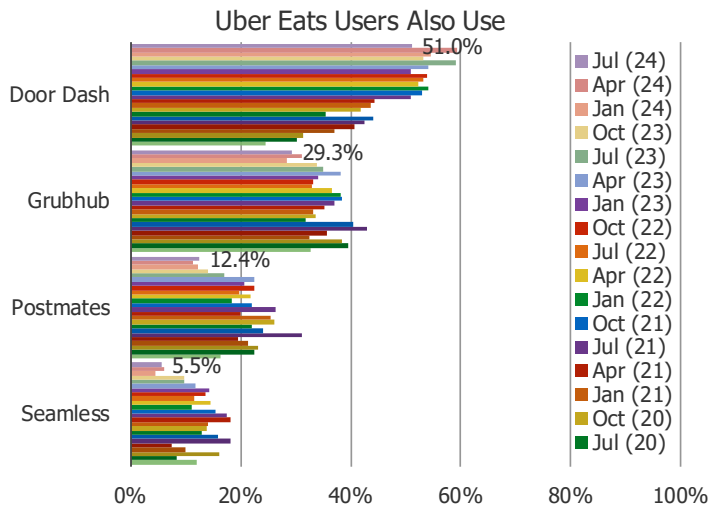
DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING PLATFORMS FOR ORDERING TAKEOUT FOOD DELIVERY?

Posed to respondents who use food delivery apps.



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

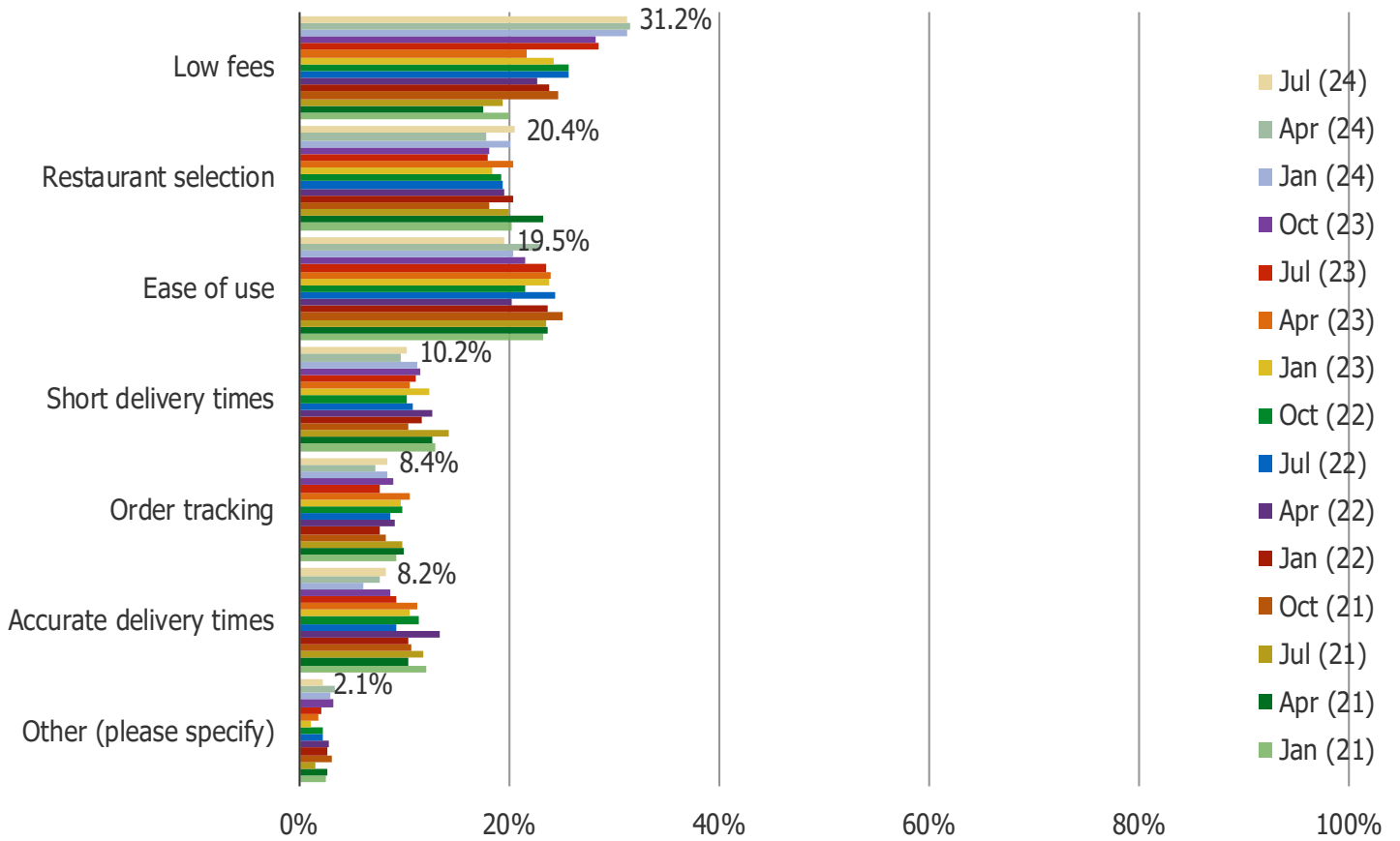
Posed to respondents who use food delivery apps.



	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
Postmates	54

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

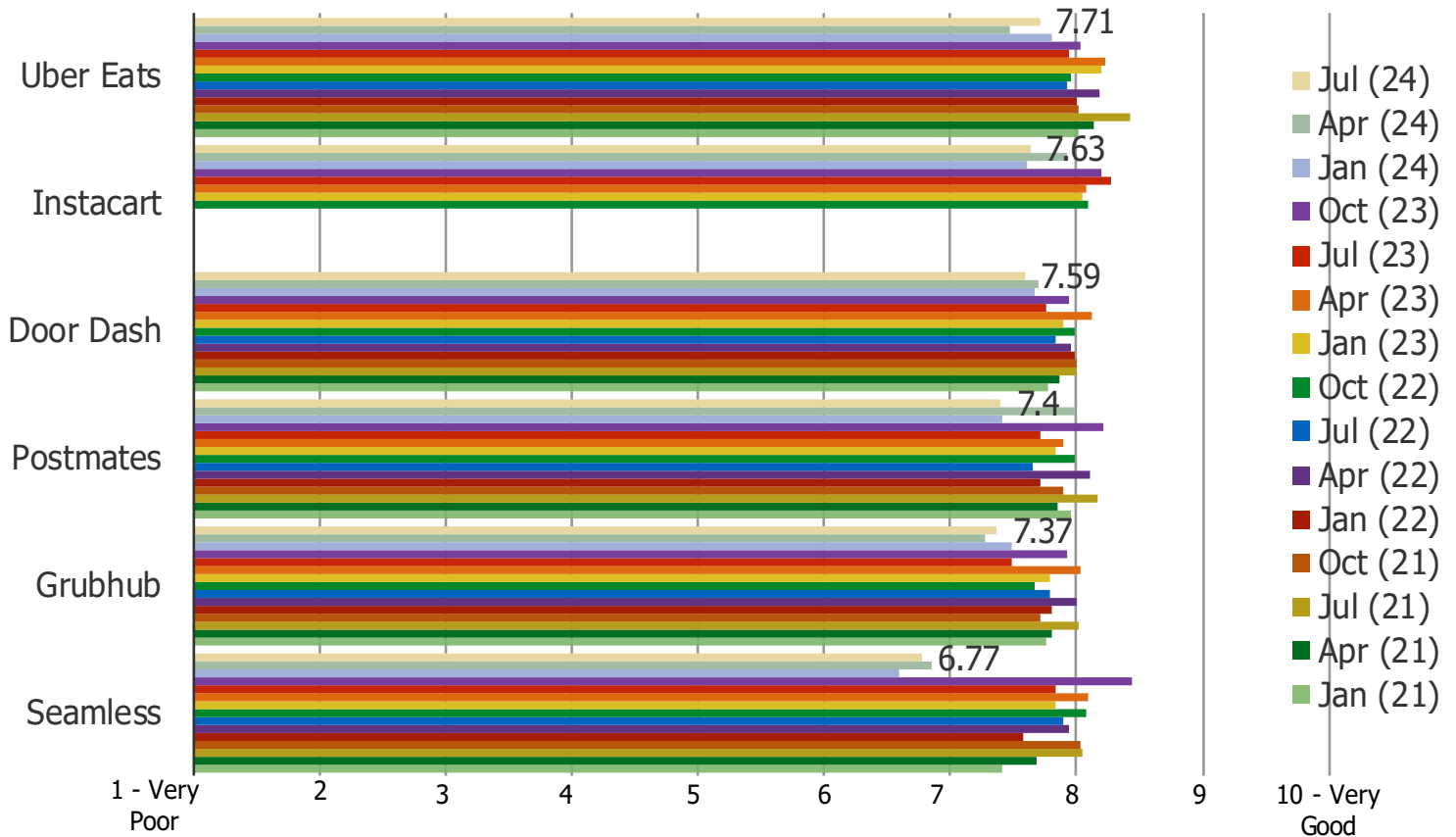
Posed to respondents who use food delivery apps.



N = 940

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

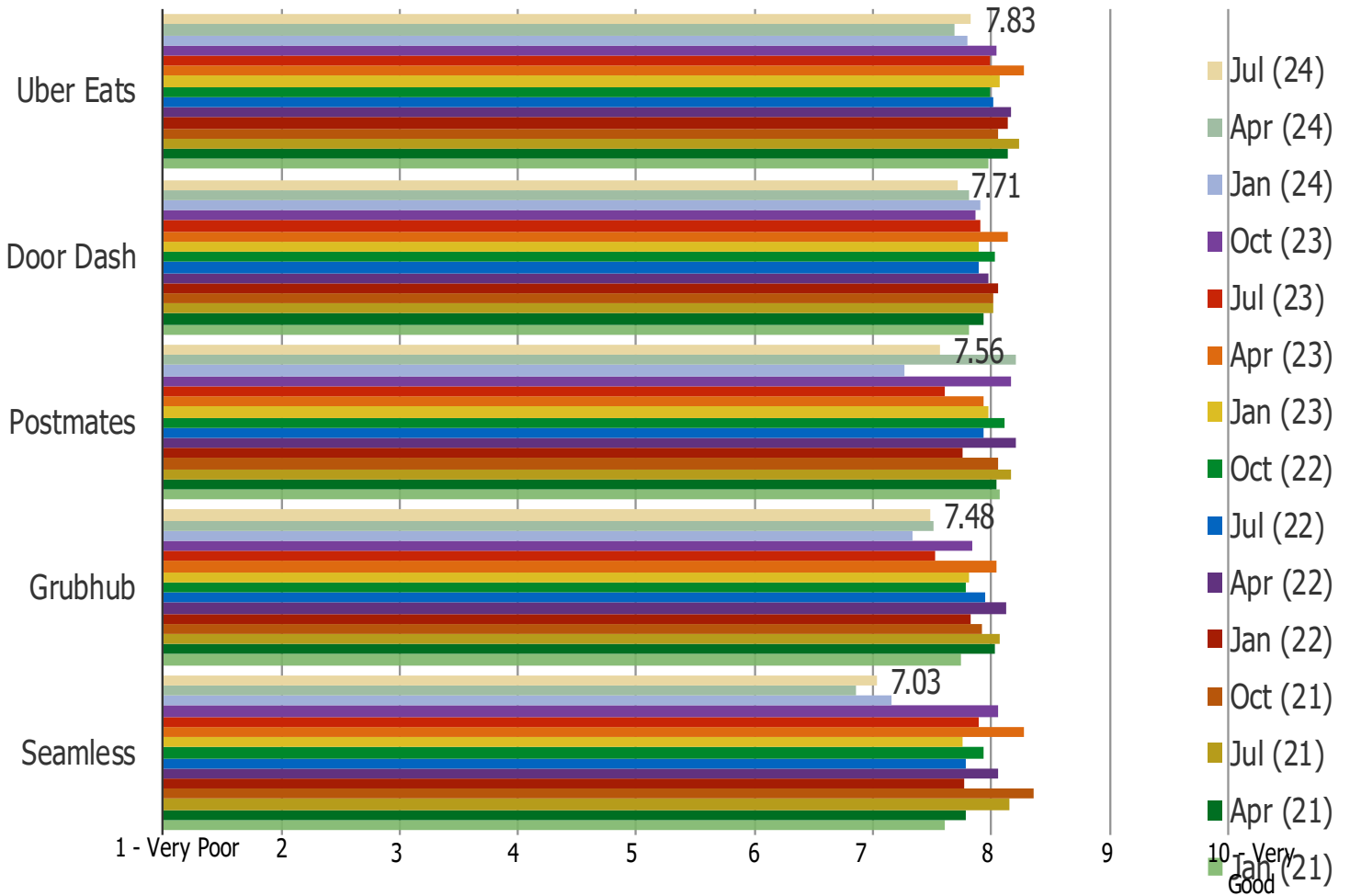
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	322
Door Dash	478
Seamless	30
Grubhub	211
Postmates	62
Instacart	131

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

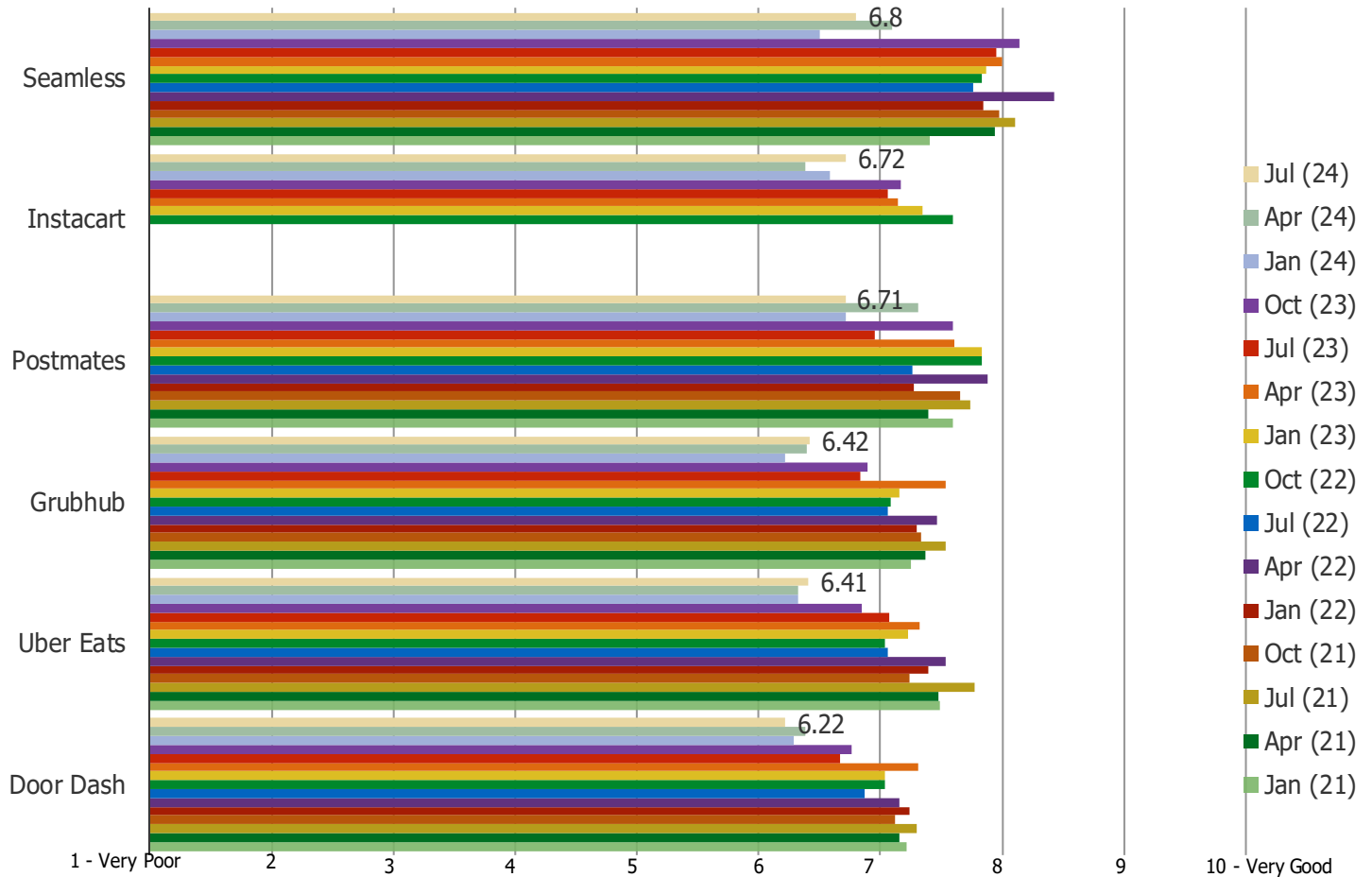
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	322
Door Dash	478
Seamless	30
Grubhub	211
Postmates	62
Instacart	131

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

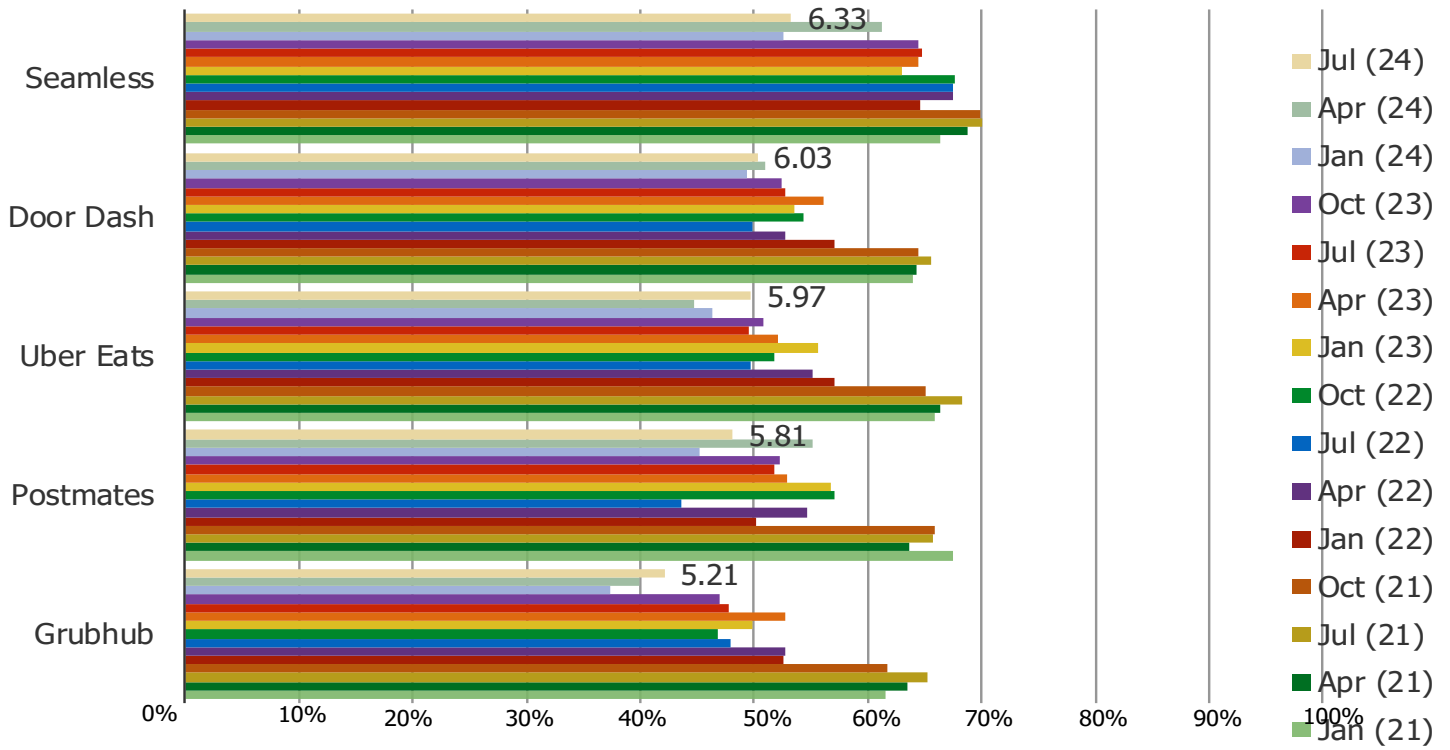
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	322
Door Dash	478
Seamless	30
Grubhub	211
Postmates	62
Instacart	131

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

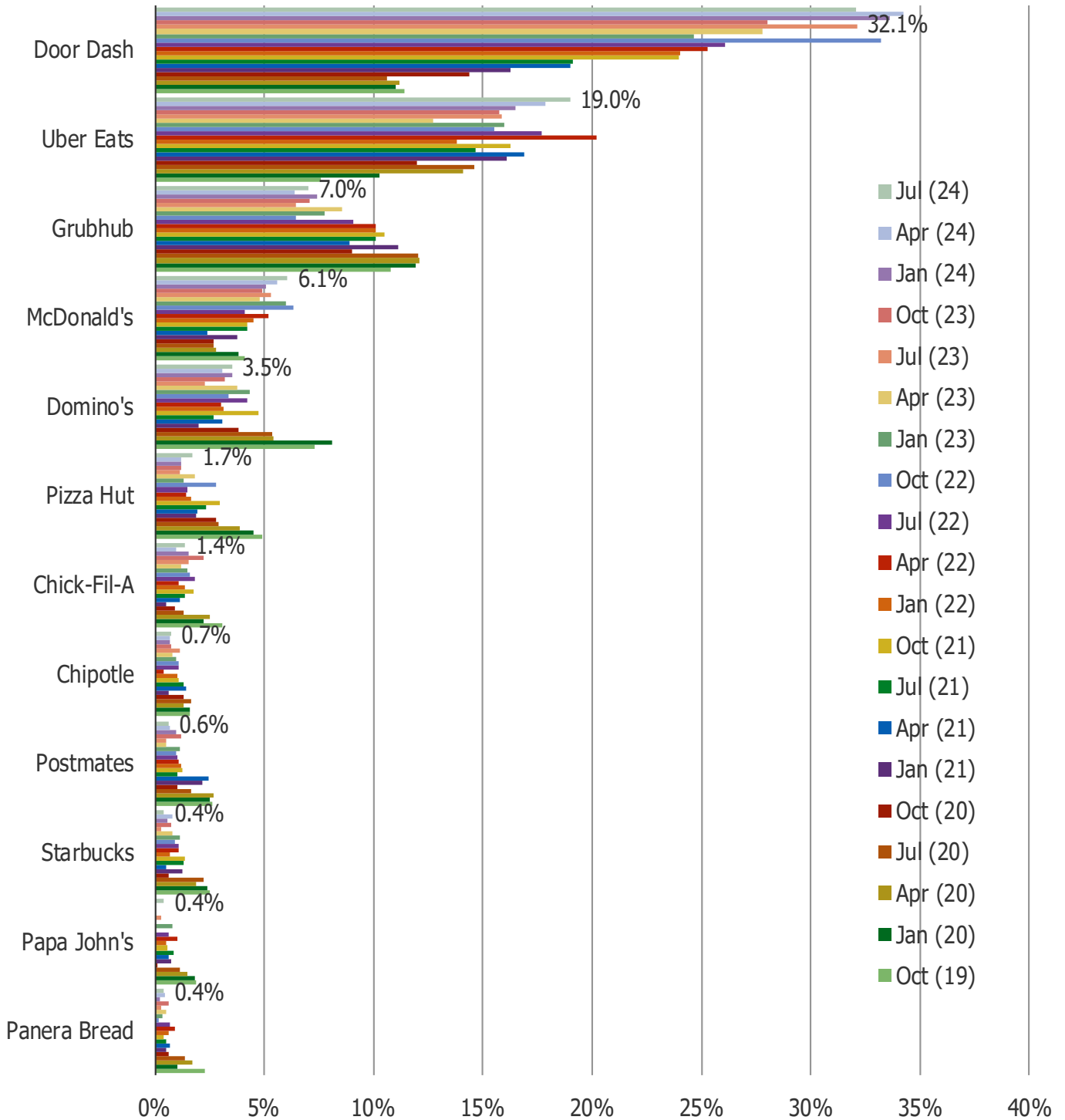
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	322
Door Dash	478
Seamless	30
Grubhub	211
Postmates	62
Instacart	131

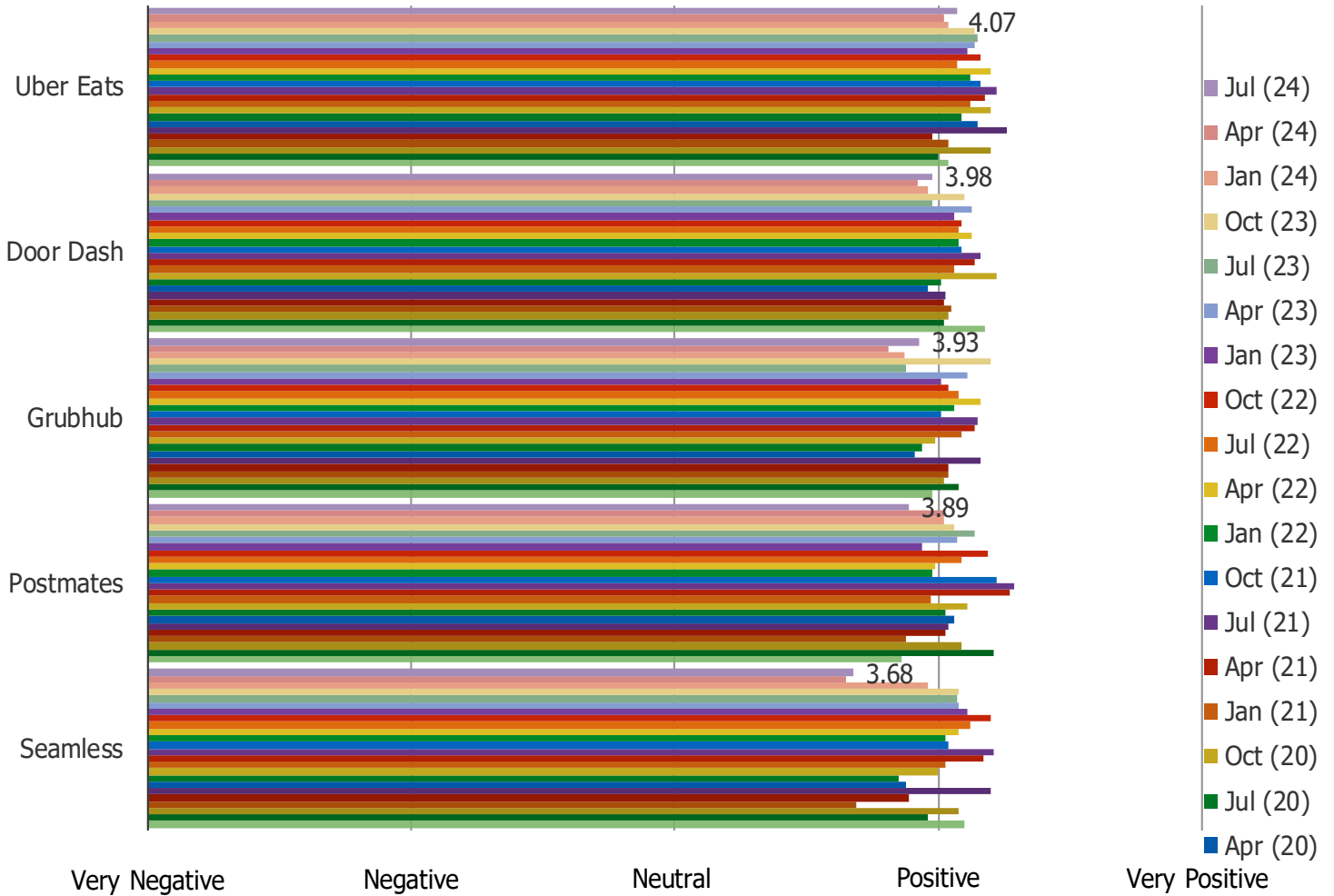
WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



WHAT IS YOUR OPINION OF THE PLATFORM?

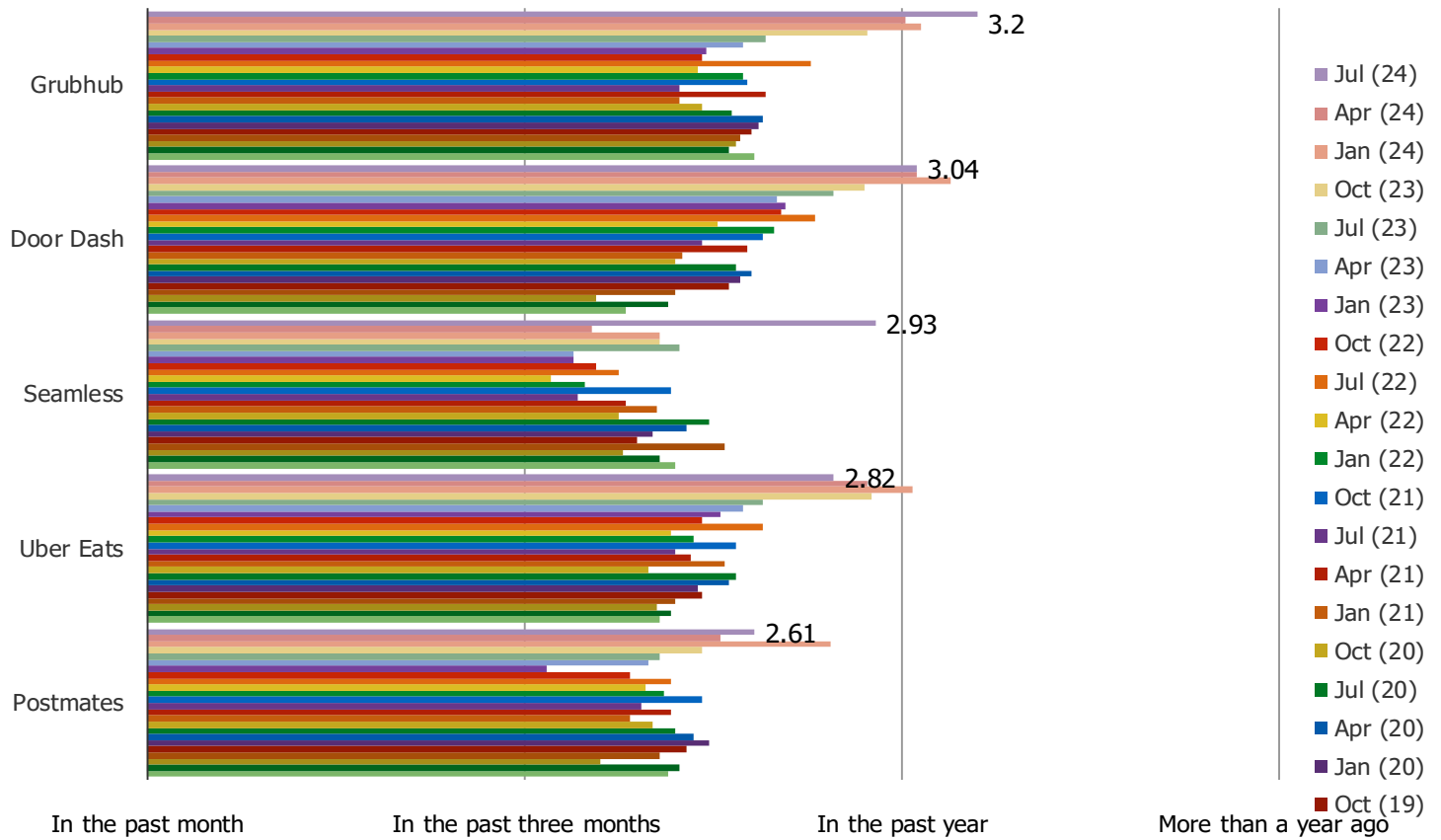
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
Postmates	54

WHEN DID YOU FIRST START USING THIS PLATFORM?

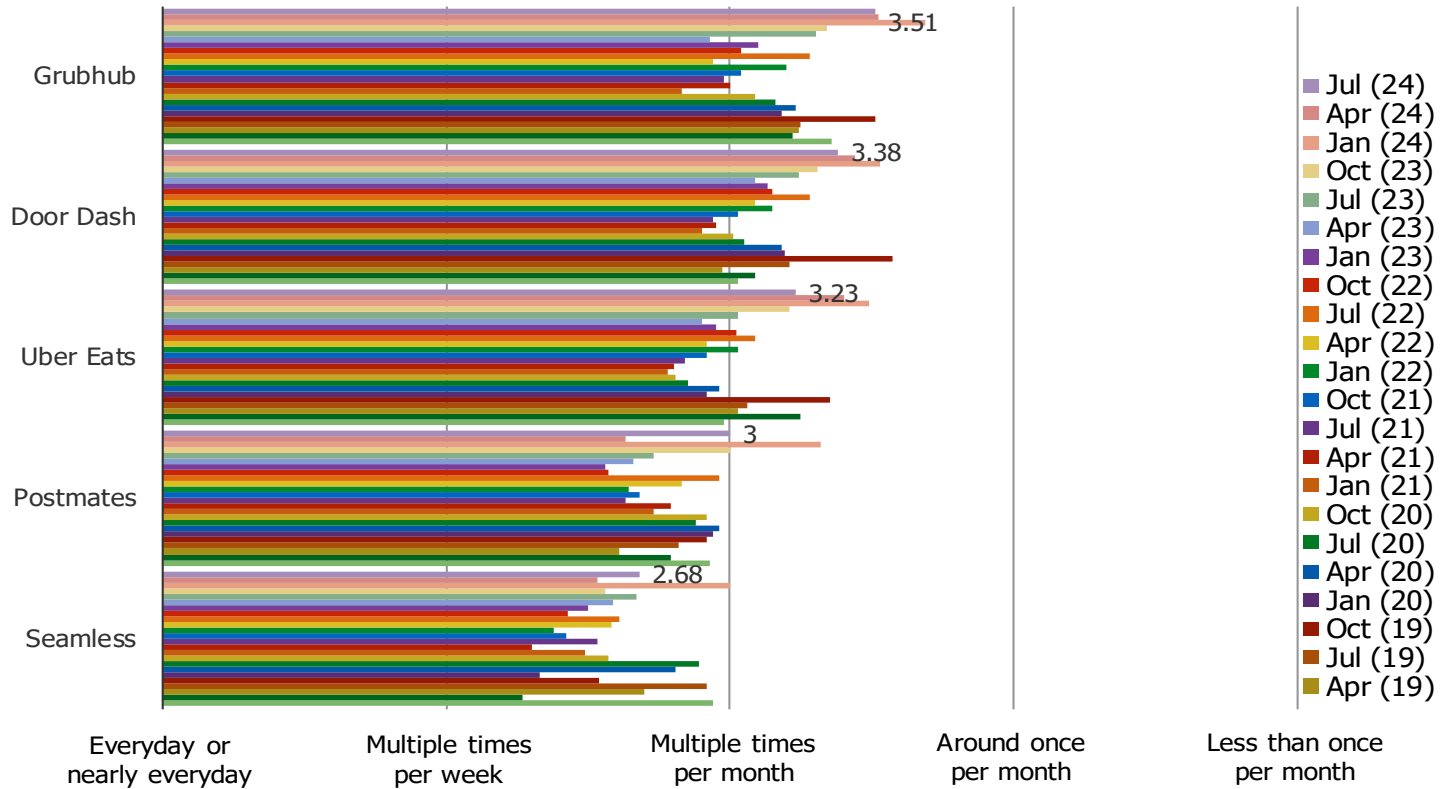
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
Postmates	54

HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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

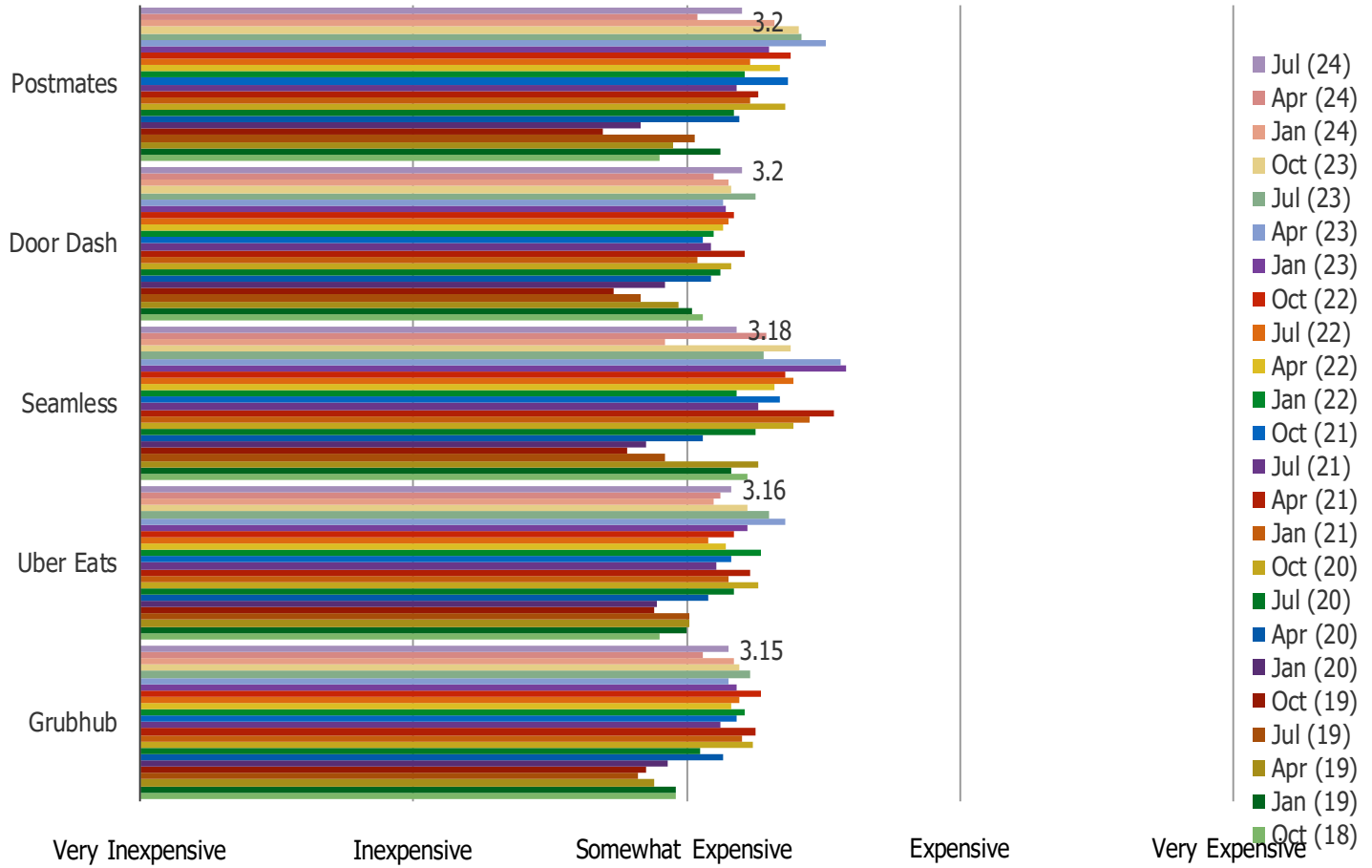


More Frequent

	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
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)

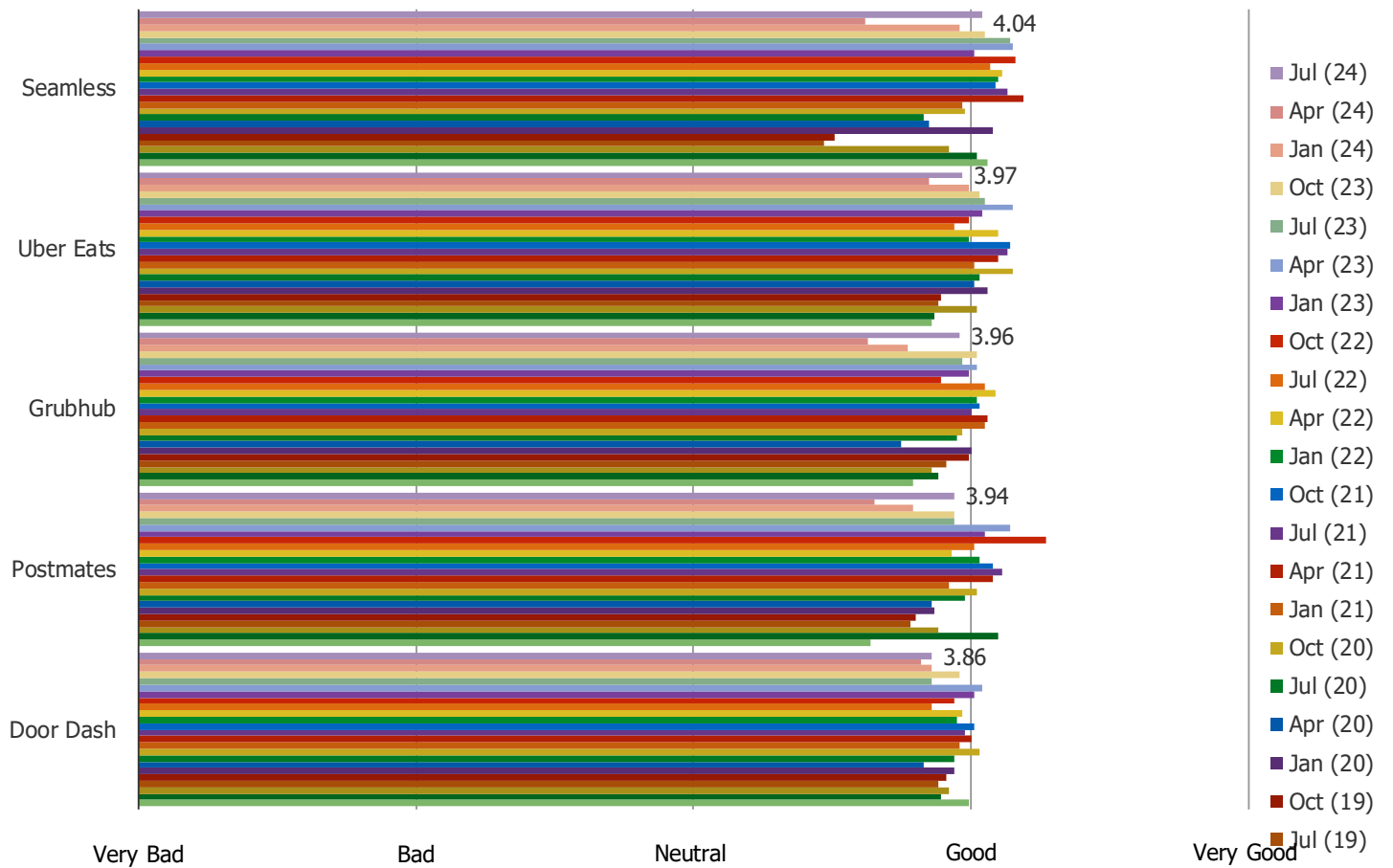
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
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.



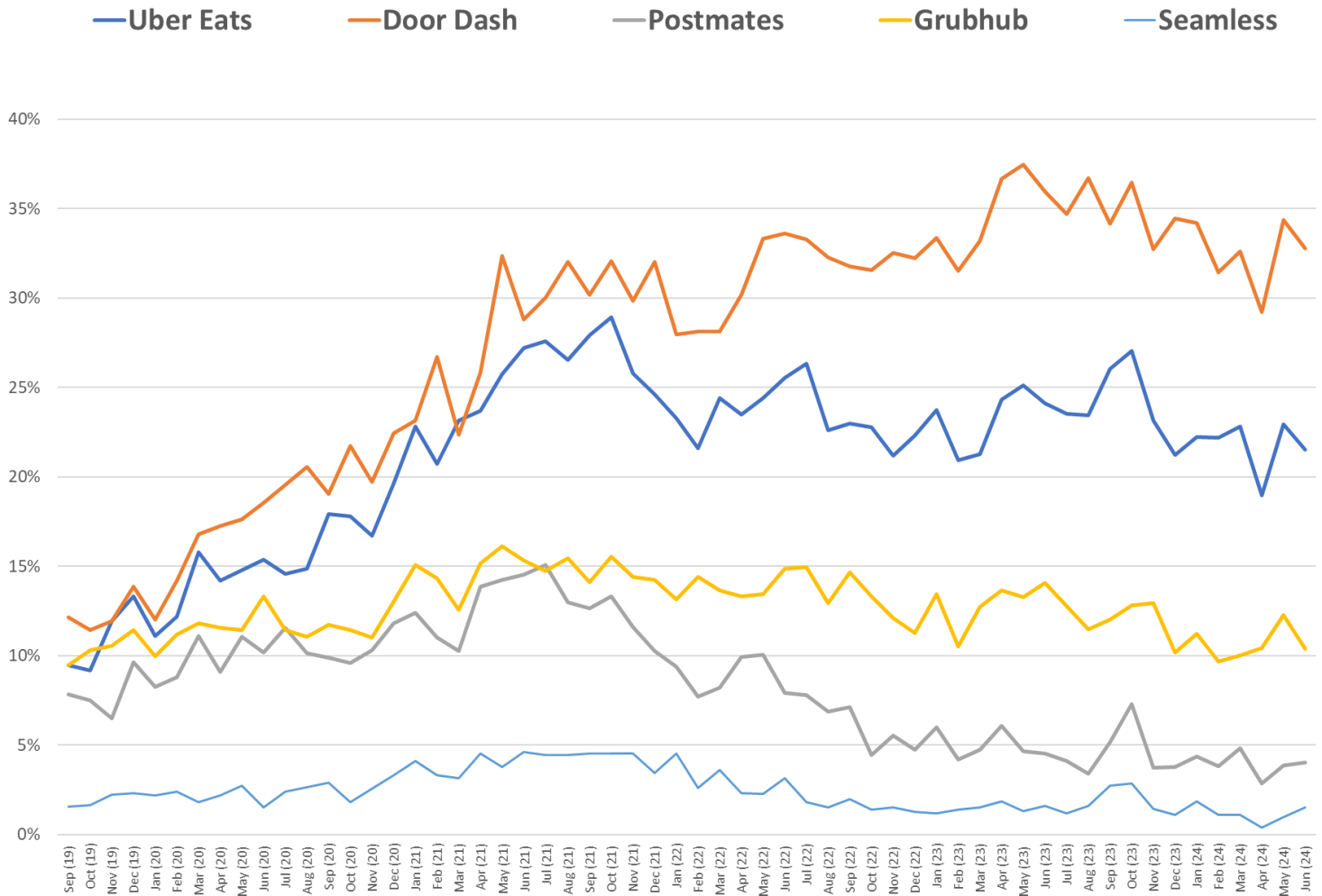
	N=
Uber Eats	290
Door Dash	450
Seamless	28
Grubhub	178
Postmates	54

Food Delivery Apps

MONTHLY DATA

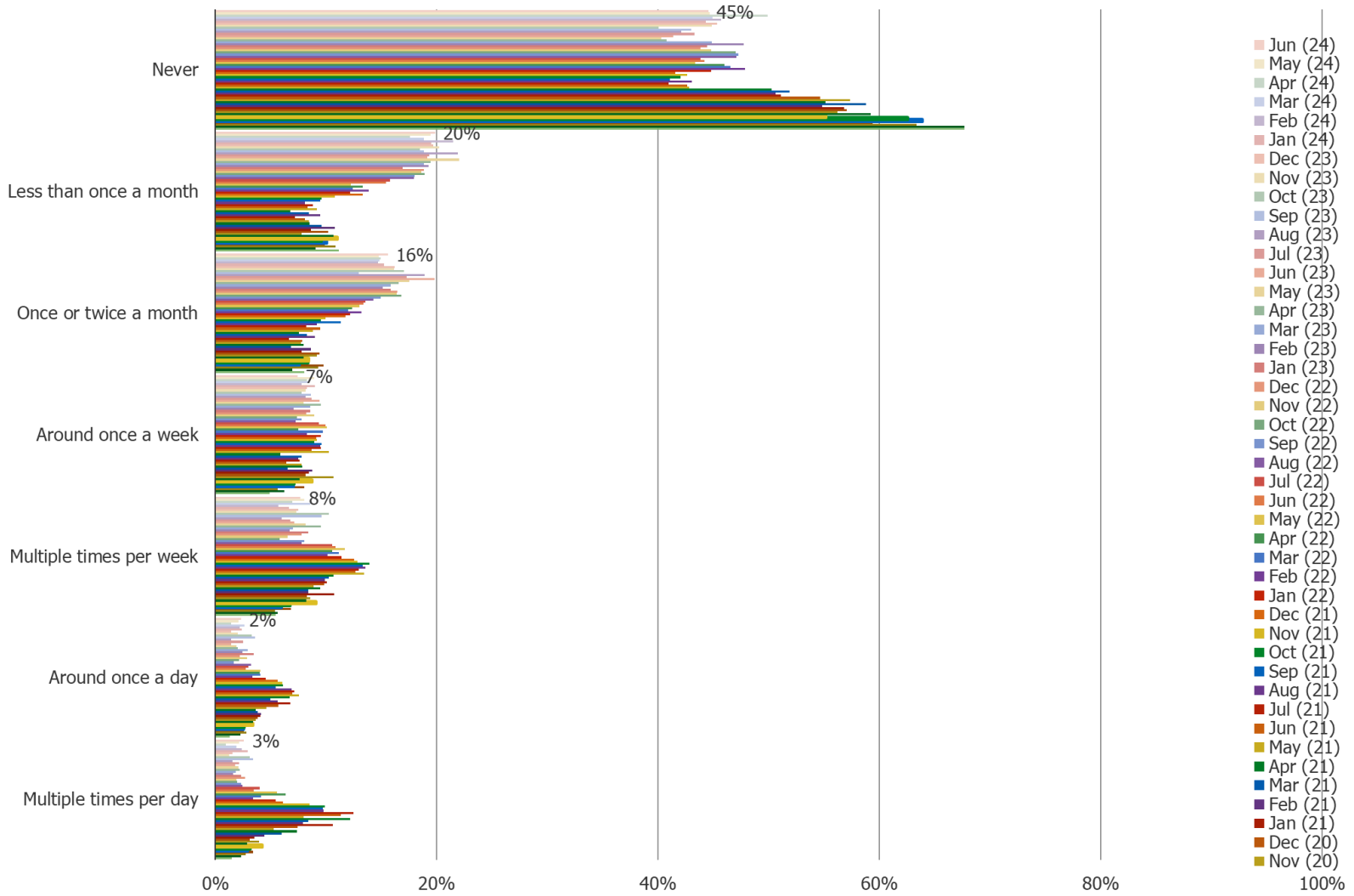
DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.



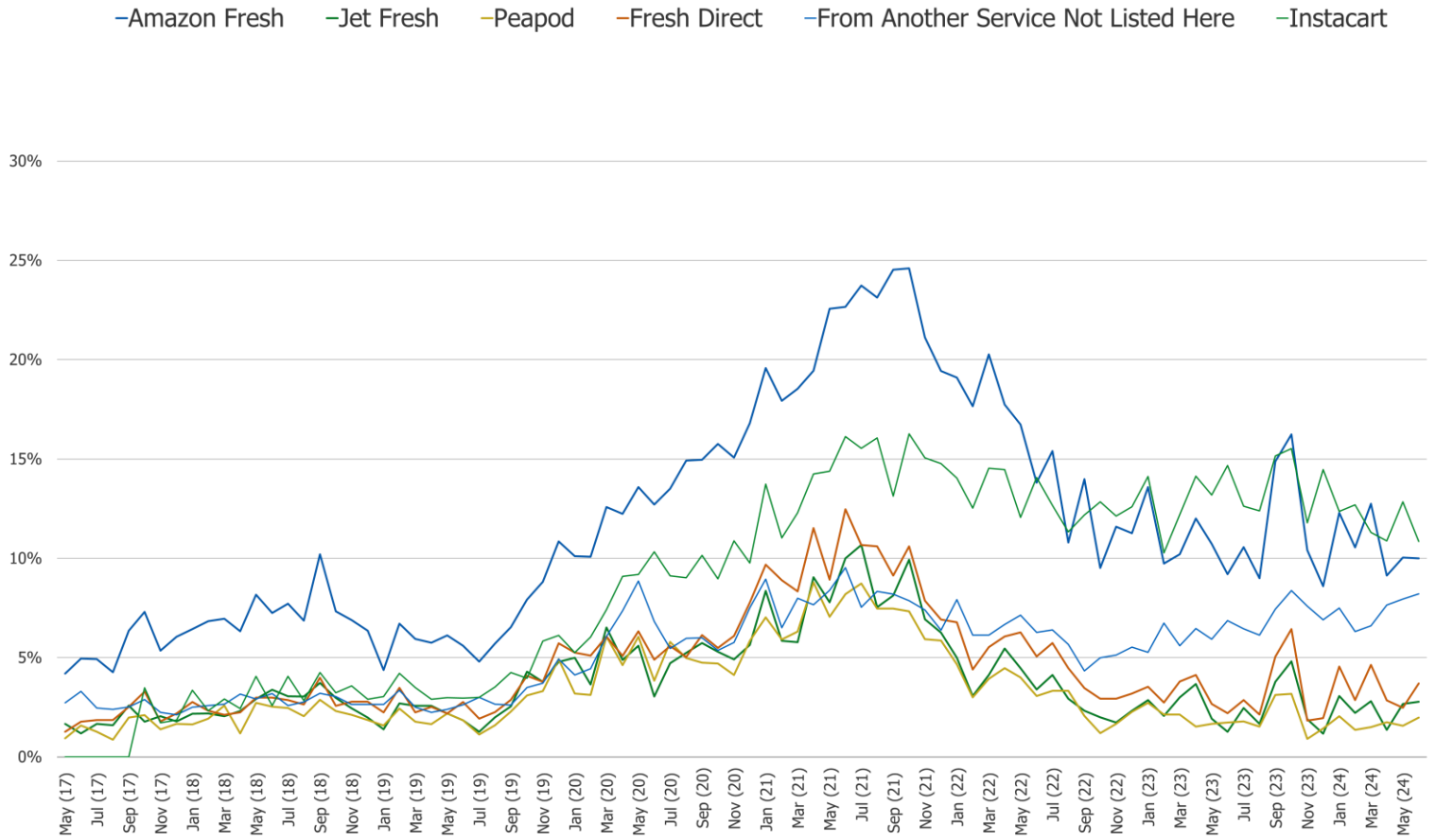
HOW OFTEN DO YOU USE FOOD DELIVERY APPS?

Posed to all respondents.



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

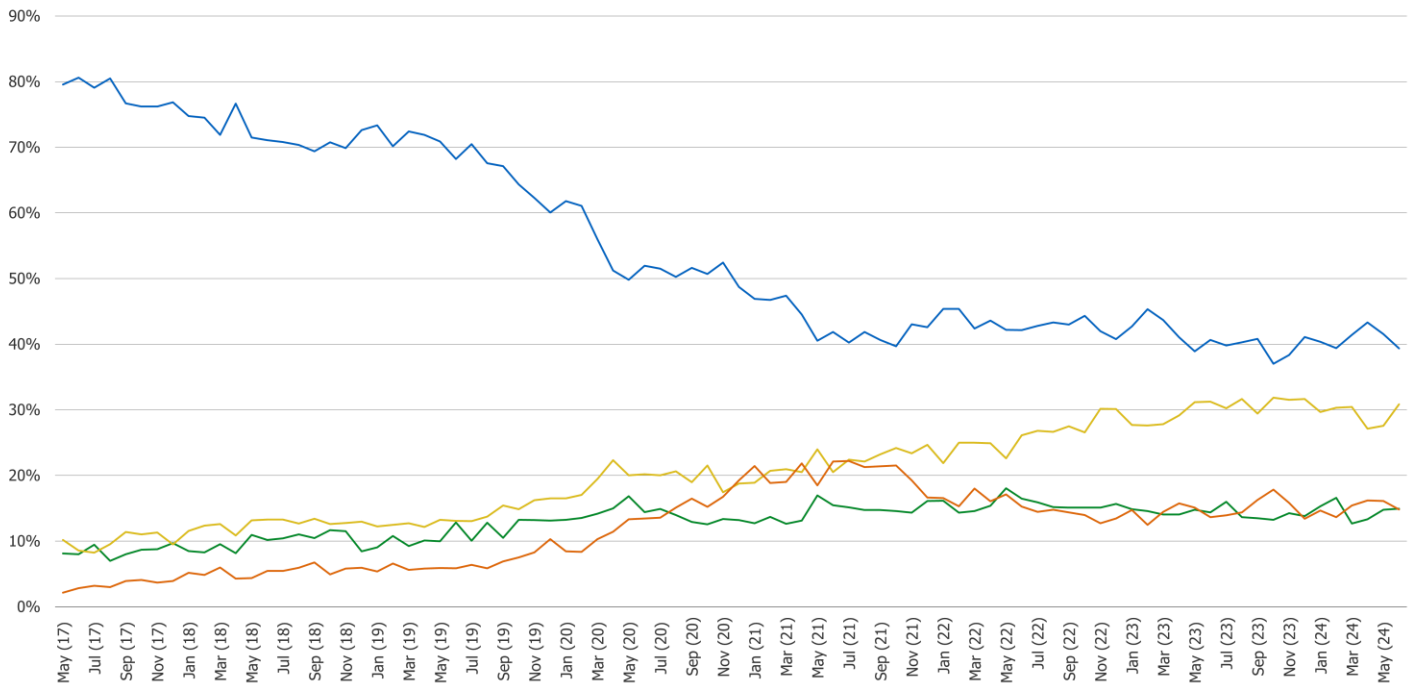
Posed to all respondents.



PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING GROCERIES ONLINE:

Posed to all respondents.

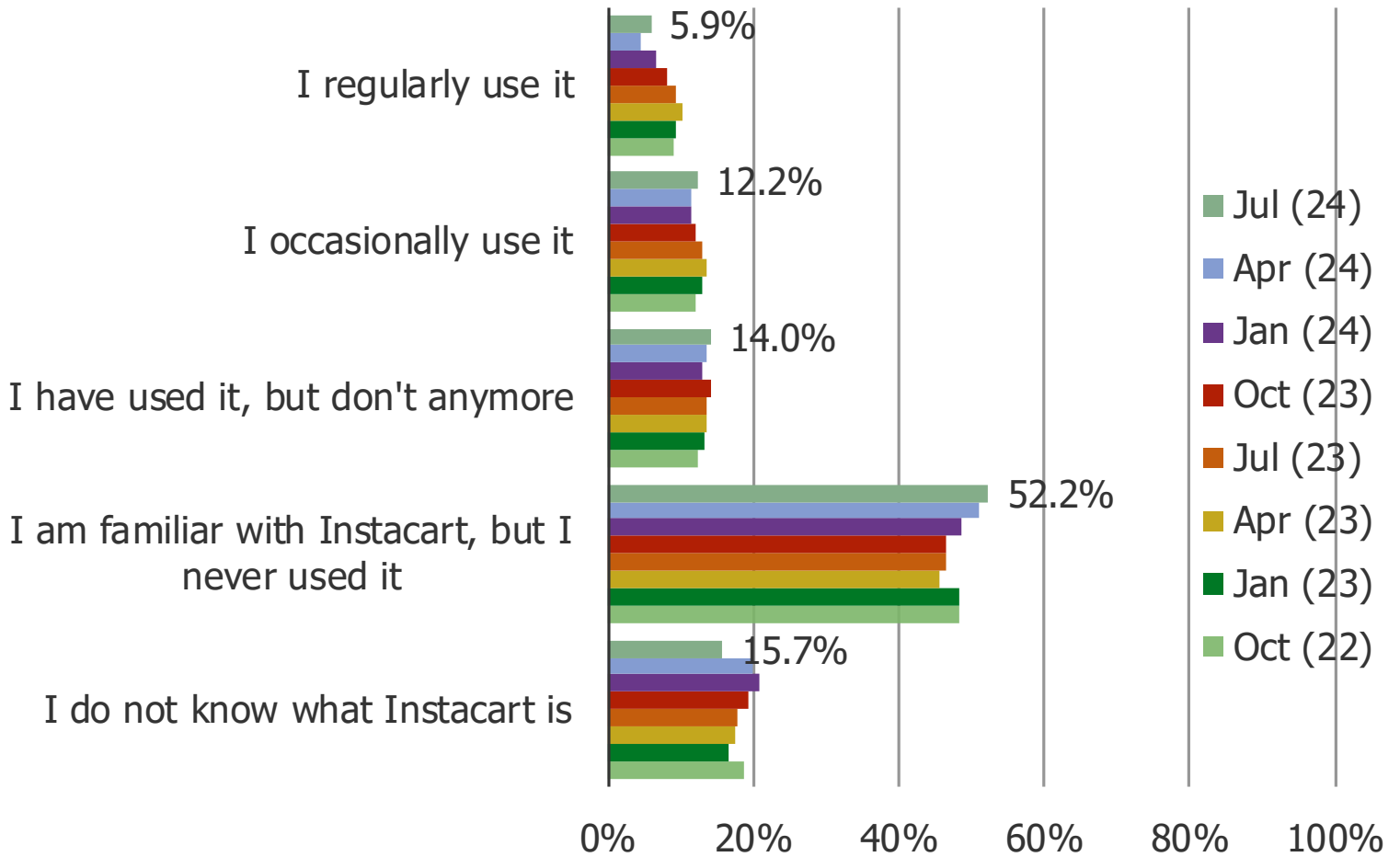
- I have never ordered groceries online
- I order groceries online occasionally
- I ordered groceries online once, but not again since
- I order groceries online regularly



INSTACART DEEPER DIVE

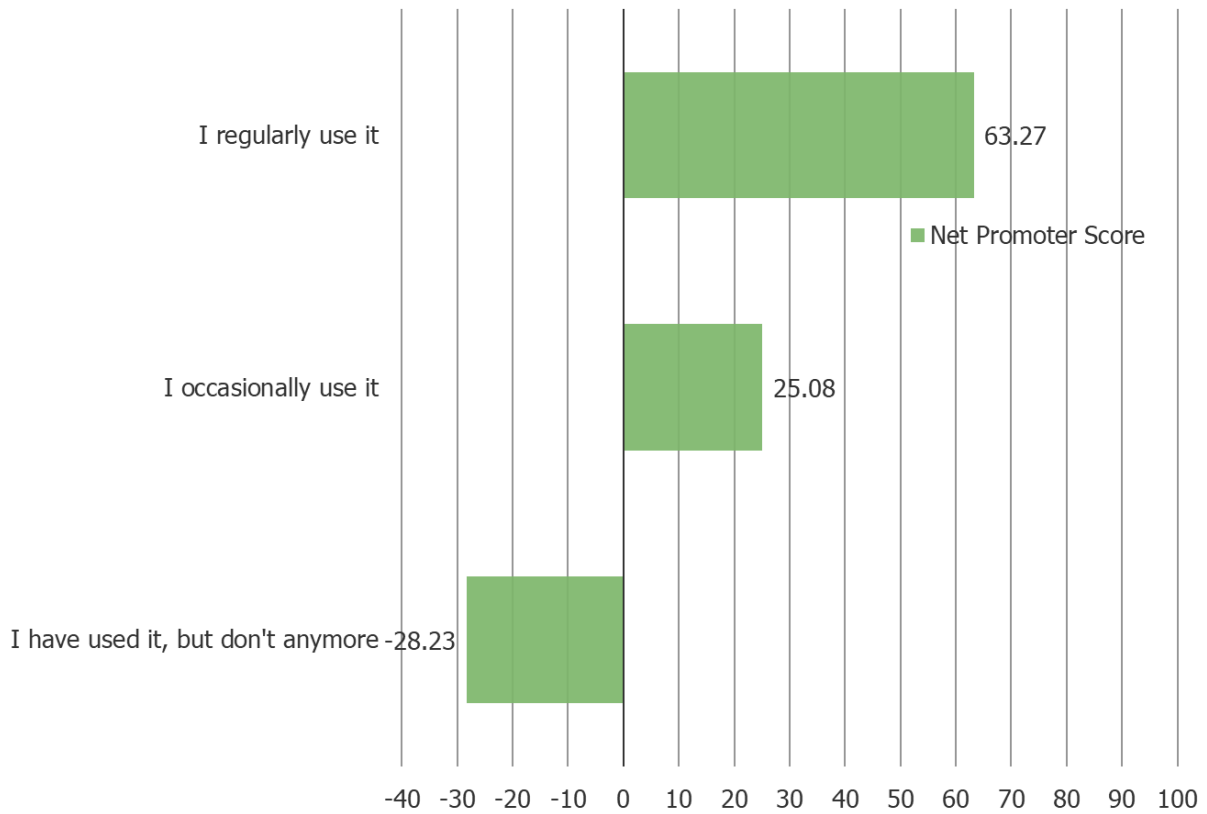
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

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...

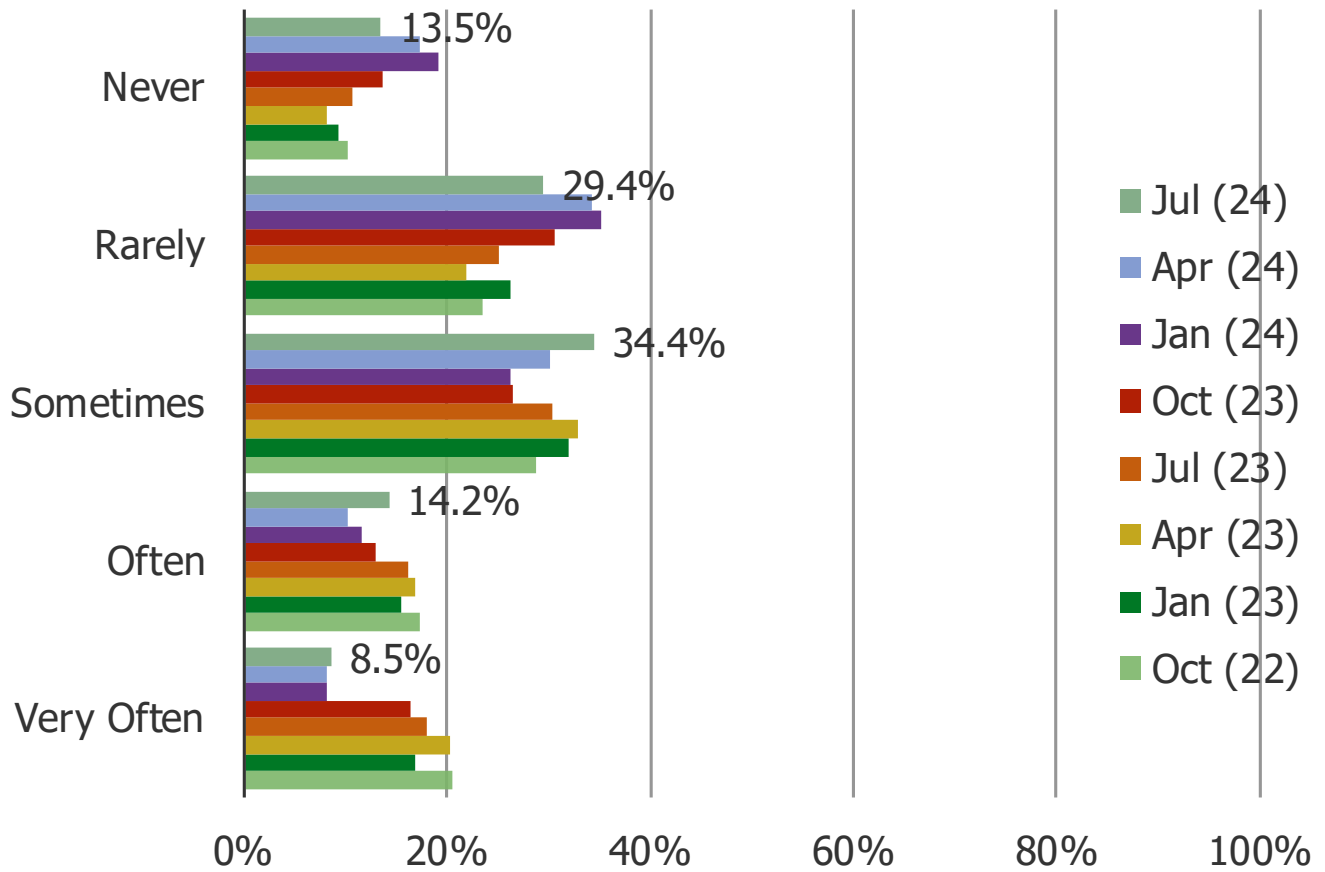
Have used it, but don't anymore: N = 1403

I occasionally use it: N = 1292

I regularly use it: N = 825

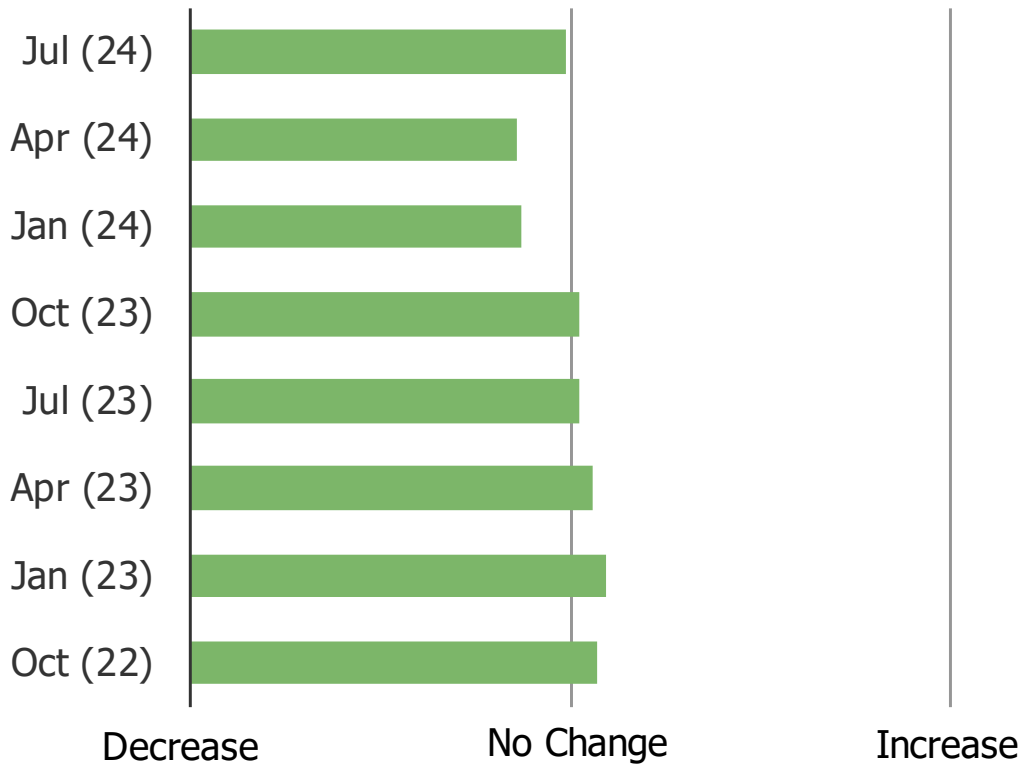
HOW OFTEN DO YOU USE INSTACART?

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 = 401)



July 2024 Data

