

Bespoke Survey Research

October 2024

Food Delivery

Volume 33 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: UBER, DASH, GRUB, CART.

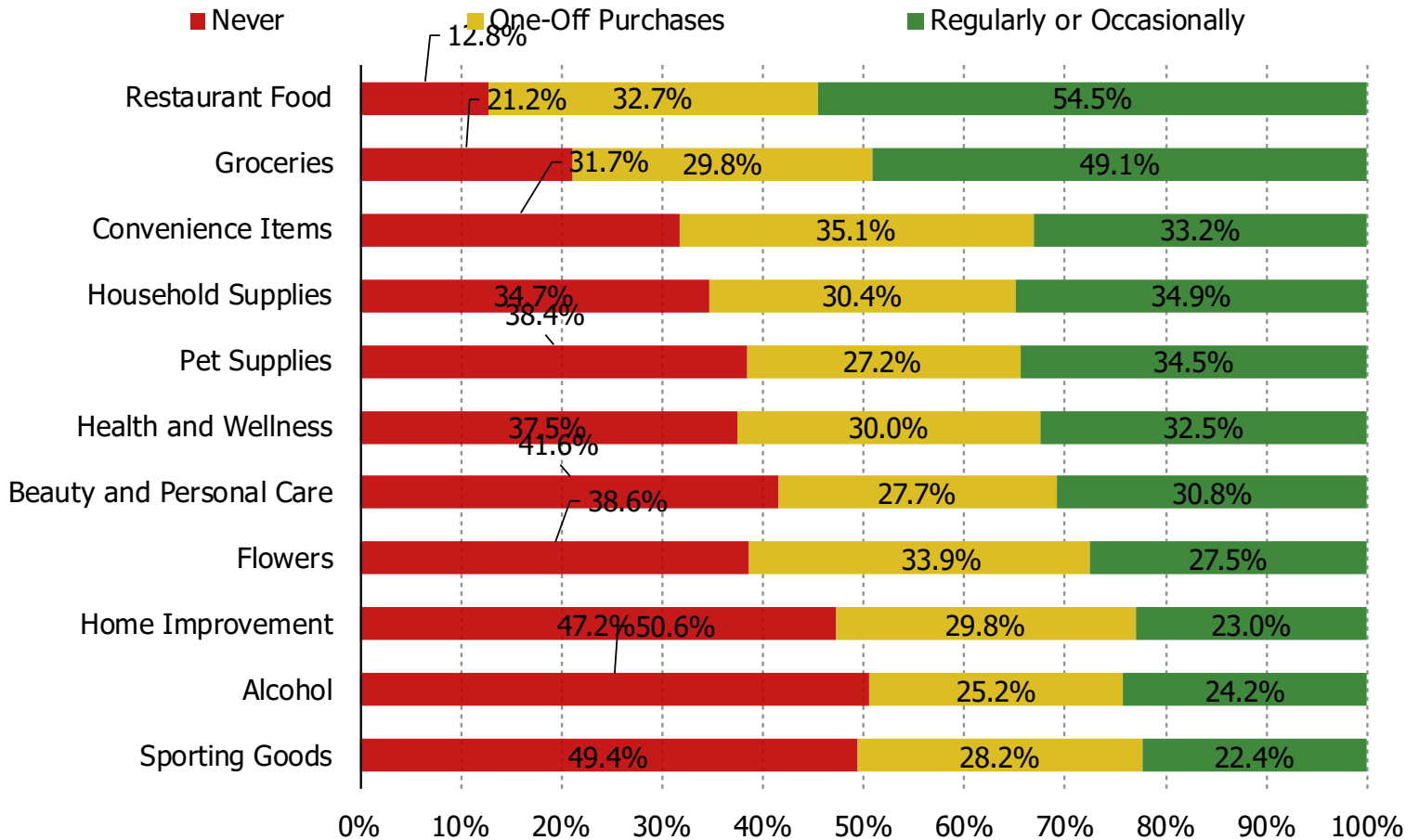
Key Takeaways:

- Those who use food delivery apps think it is more appropriate to use these apps for food and grocery delivery vs. purchases of sporting goods, alcohol, and home improvement goods.
- Food delivery app usage is tracking flat q/q but lower y/y.
- Among those who use both, a higher share prefers to use DoorDash vs. Uber Eats if they could only choose one.
- DoorDash continues to be the top platform that consumers use, followed by Uber Eats. DoorDash has been a market share gainer over the history of our survey.
- NPS of Instacart regular users remains strong at ~63.
- The share who use Instacart regularly is holding steady q/q.

NEW QUESTIONS

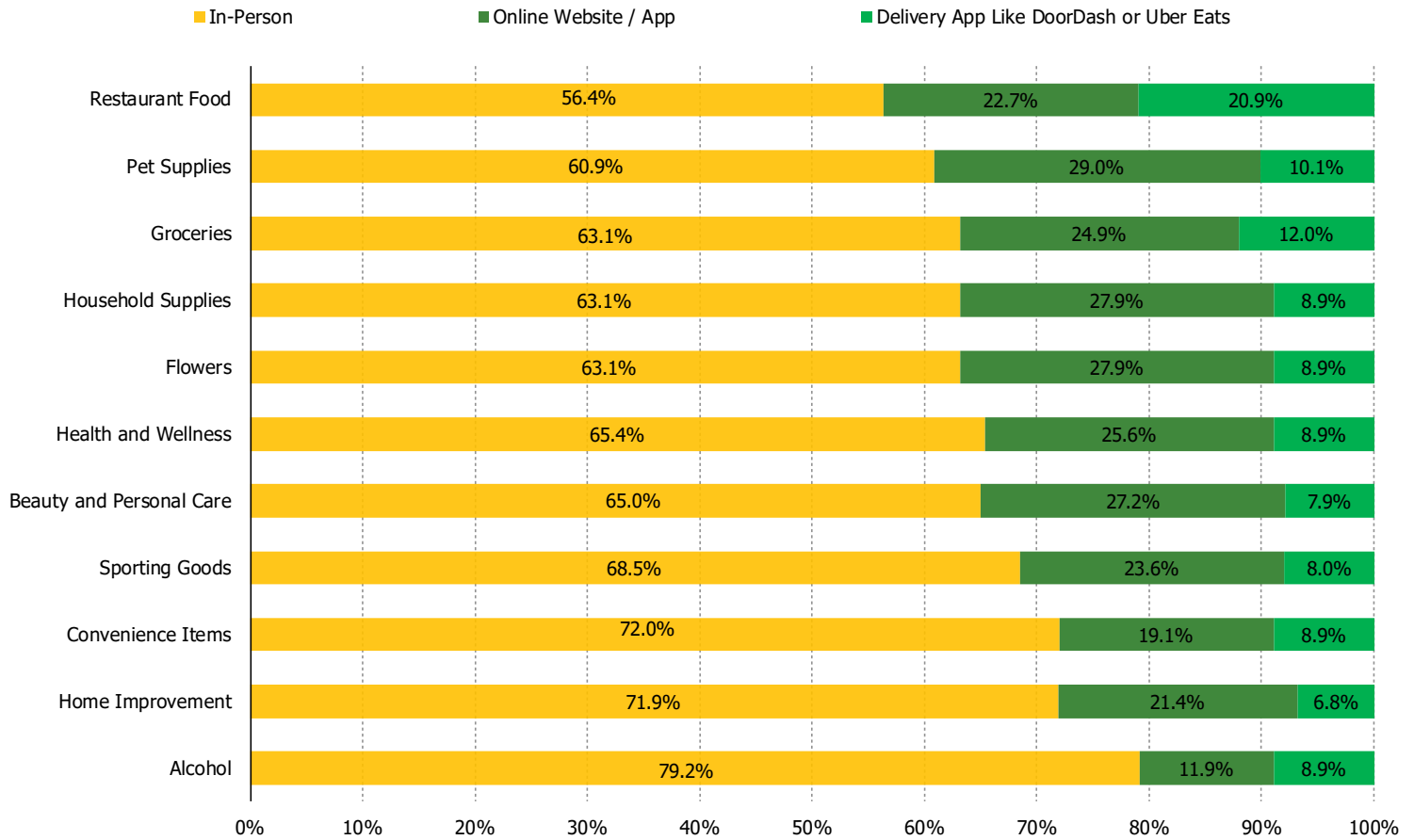
HOW OFTEN DO YOU THINK IS APPROPRIATE TO USE FOOD DELIVERY APPS (LIKE DOORDASH AND UBER EATS), FOR THE FOLLOWING...

Posed to all respondents who use food delivery apps.



HOW DO YOU PREFER TO BUY THE FOLLOWING...

Posed to all respondents who use food delivery apps.

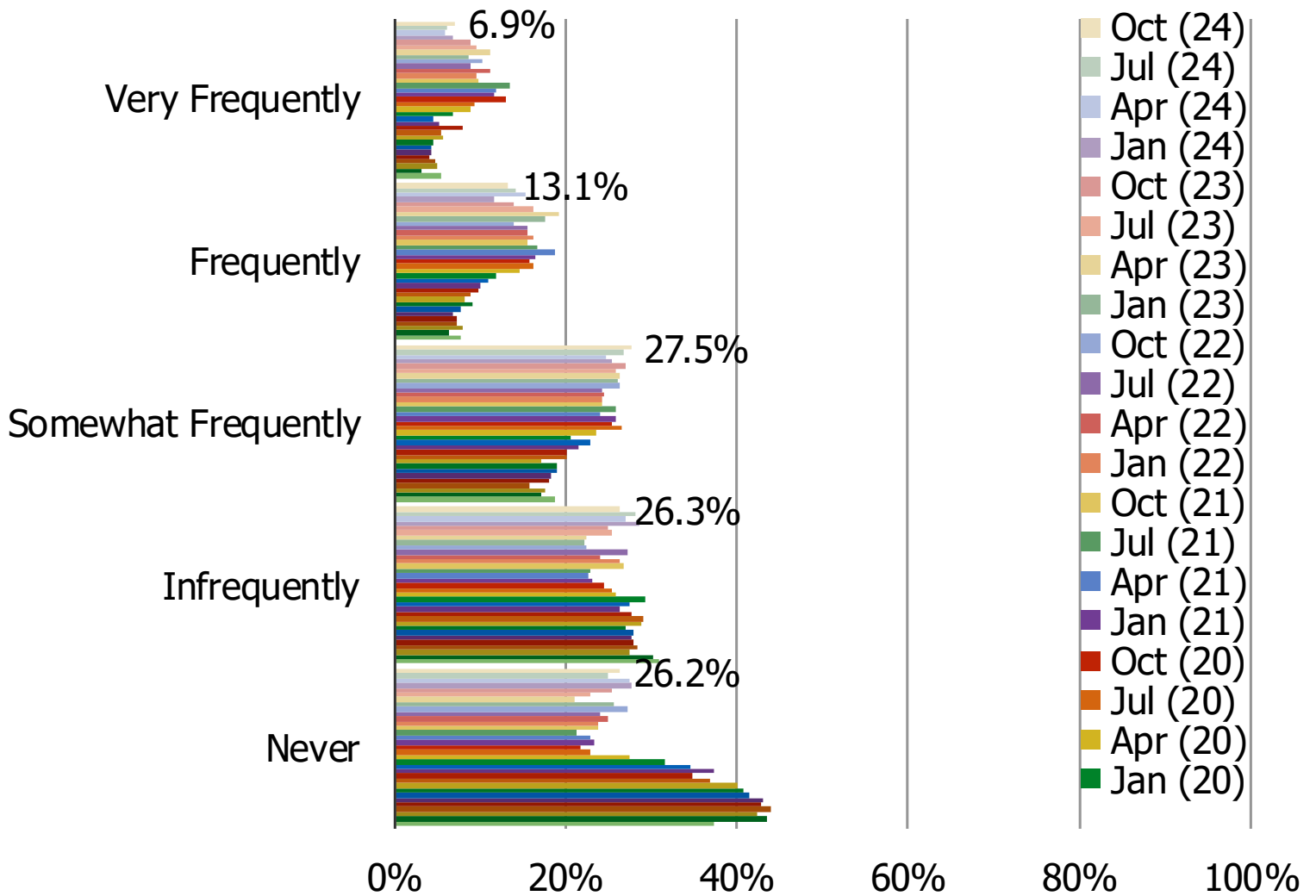


Food Delivery Apps

FOOD DELIVERY

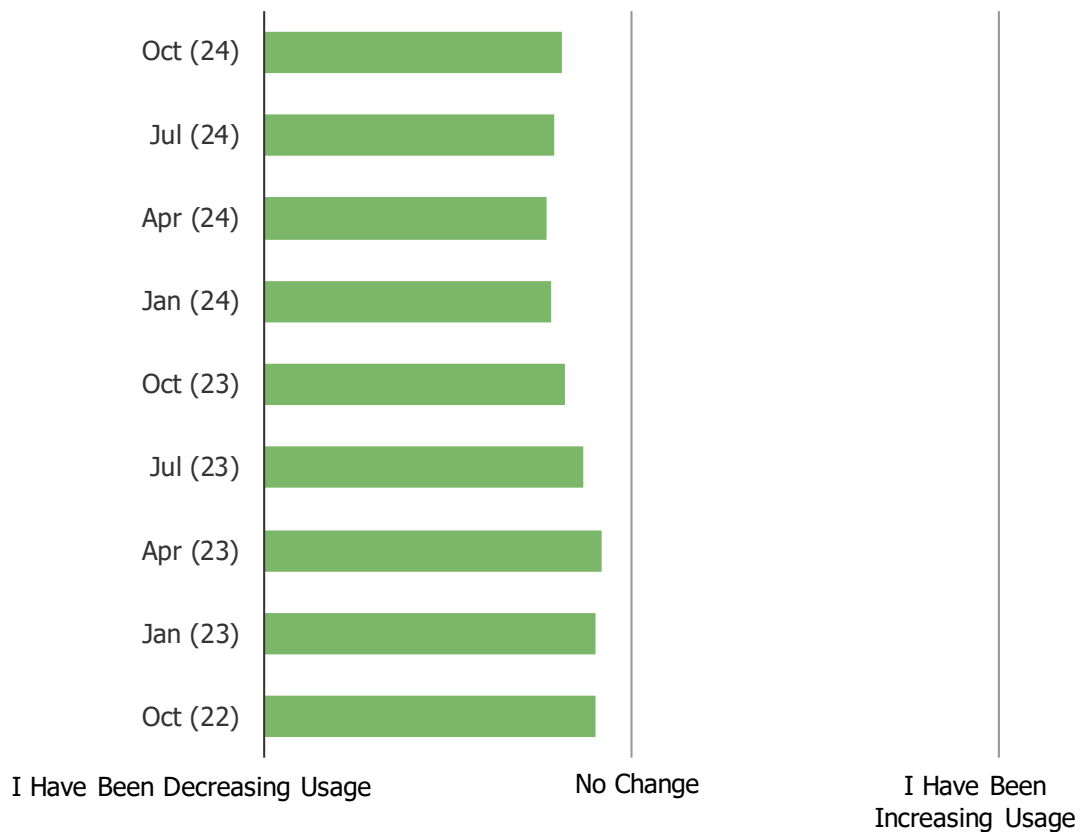
HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



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

Posed to respondents who use food delivery apps.

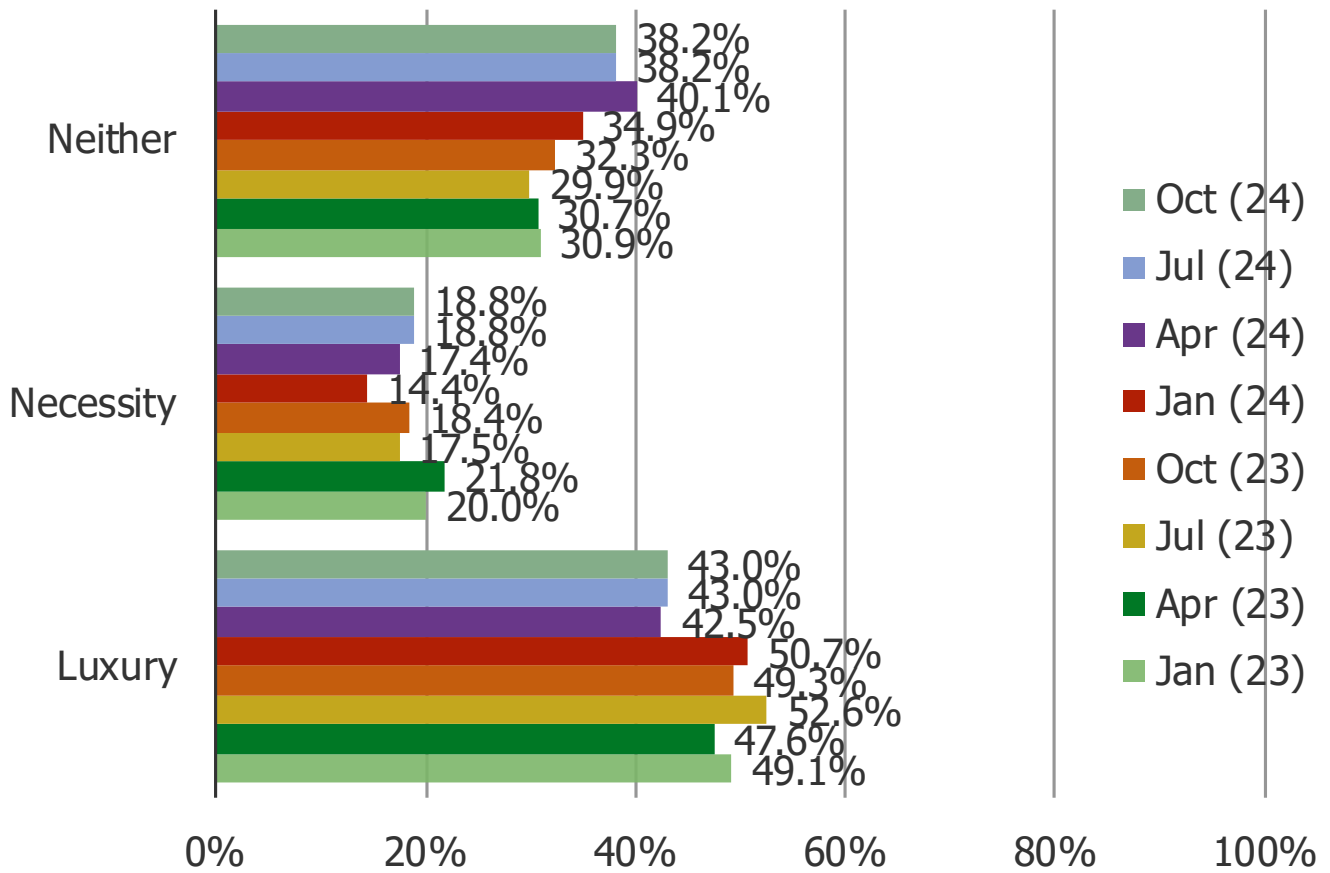


Optional Comments:



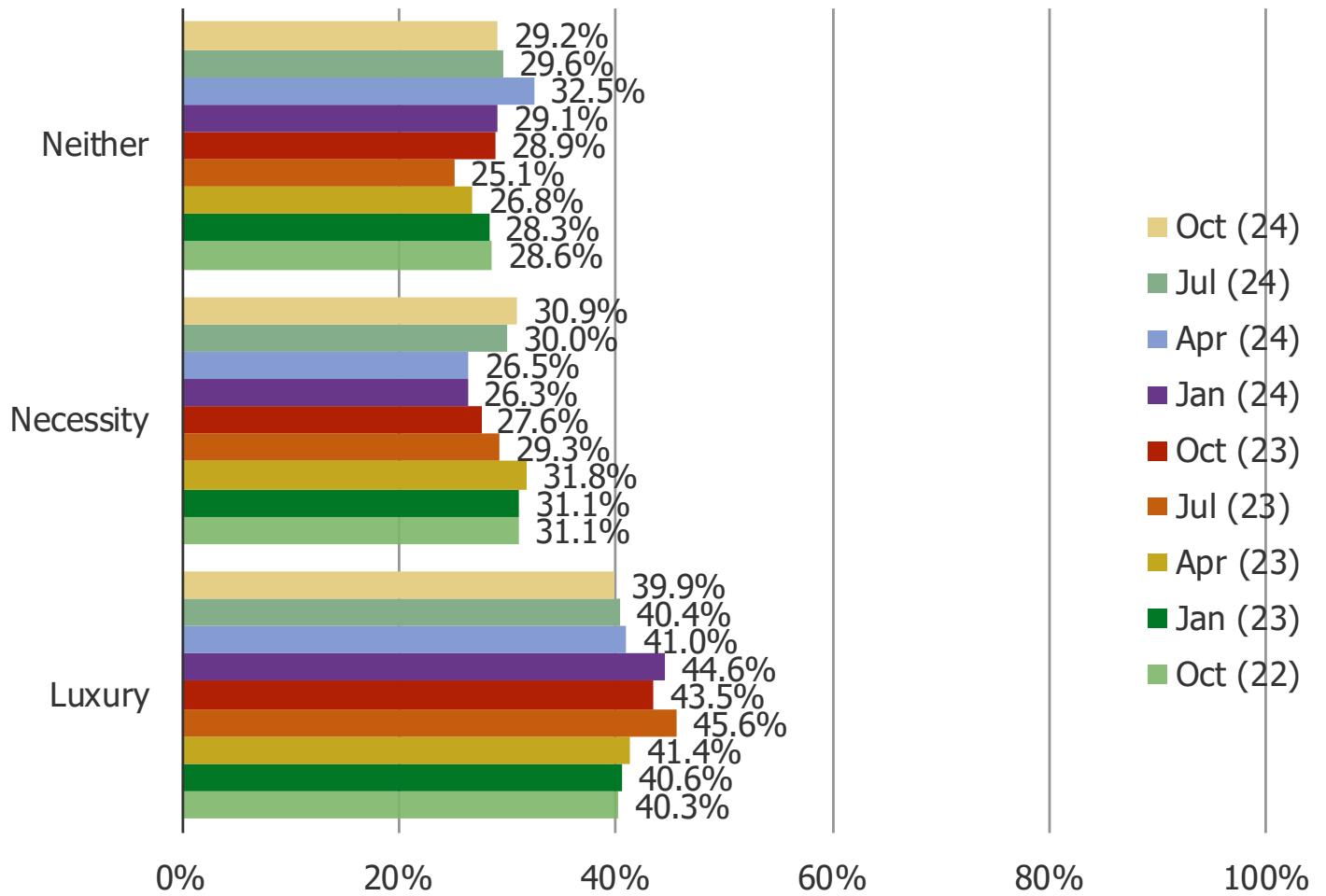
DO YOU VIEW FOOD DELIVERY APPS (EG, DOORDASH, UBER EATS, GRUBHUB, POSTMATES, ETC) AS MORE OF A...

Posed to all respondents.



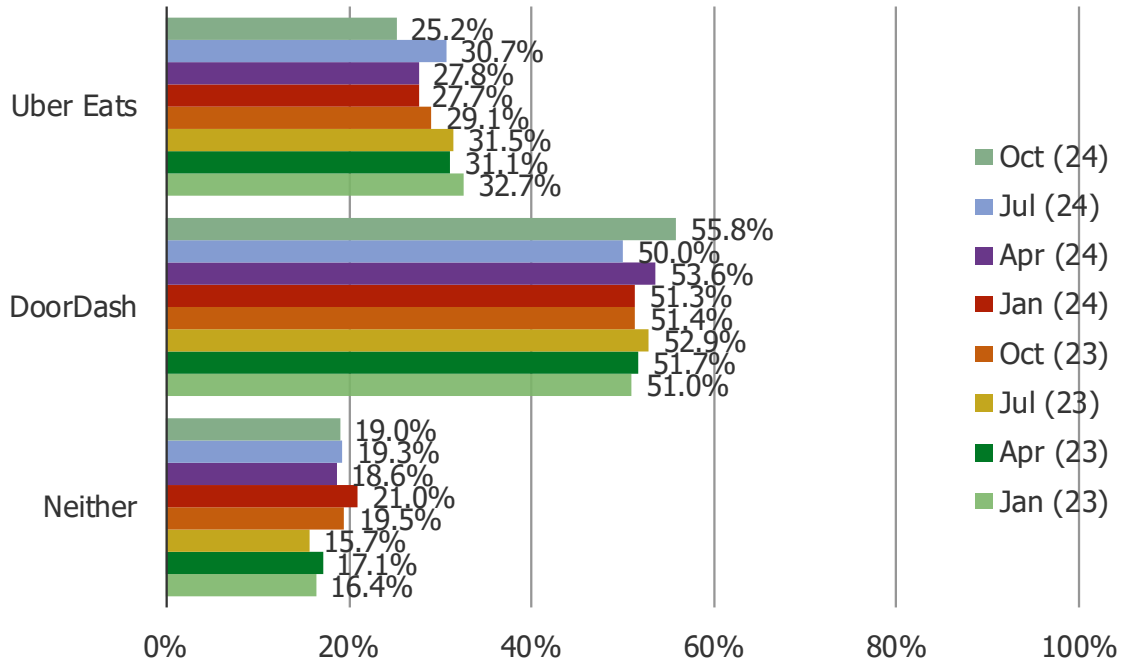
DO YOU VIEW GROCERY DELIVERY AS MORE OF A...

Posed to all respondents.

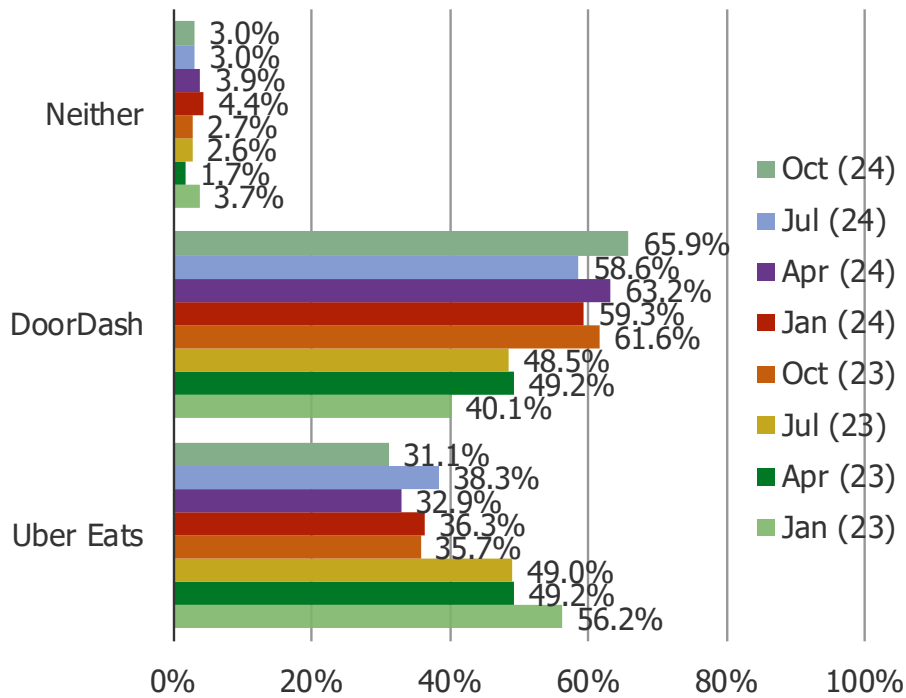


IF YOU HAD TO CHOOSE ONLY ONE OF THESE TO USE, WHICH WOULD YOU PICK?

Posed to all food delivery users.

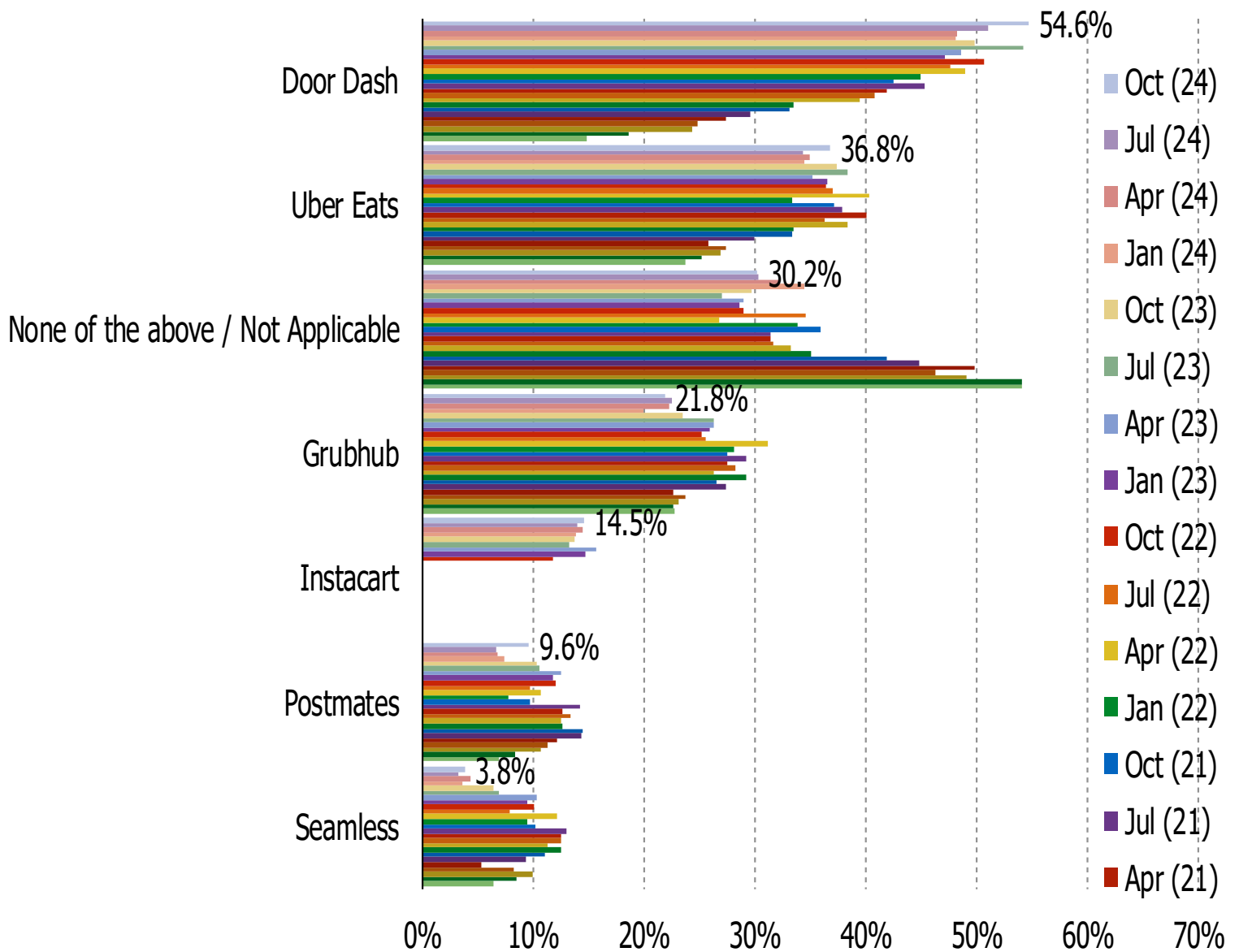


Posed to respondents who said they use BOTH DoorDash AND Uber Eats.



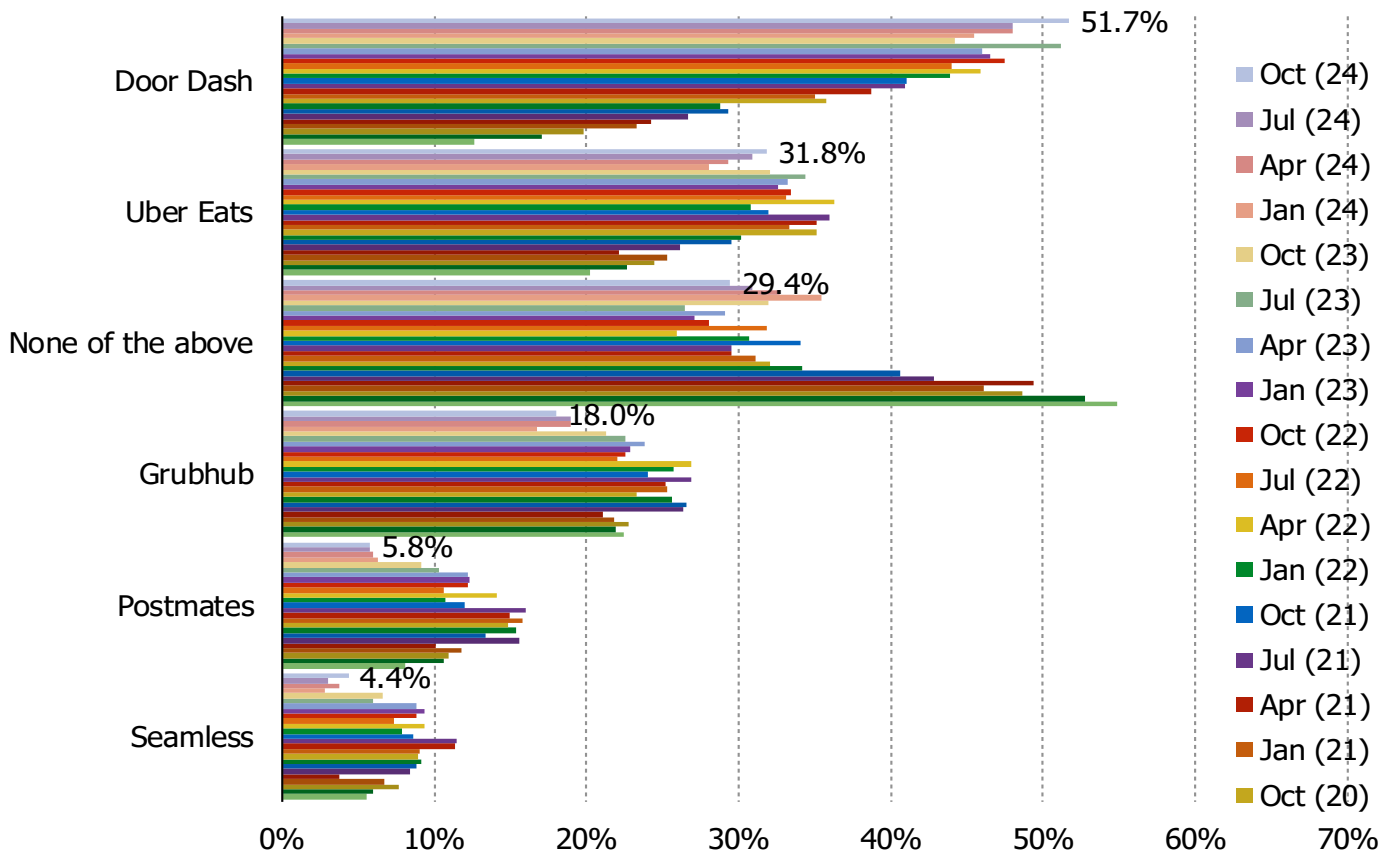
DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

Posed to respondents who use food delivery apps.



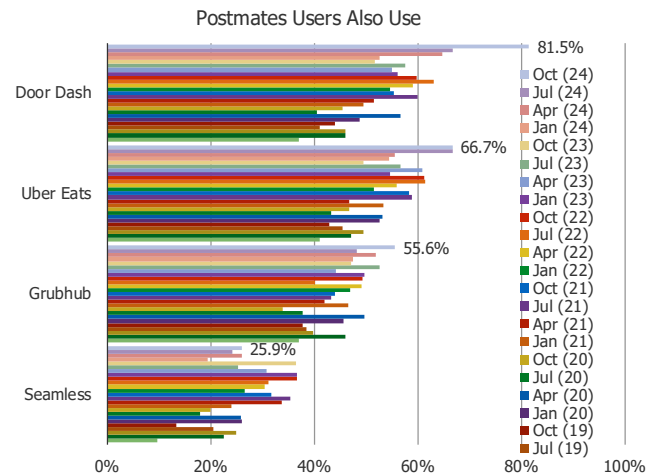
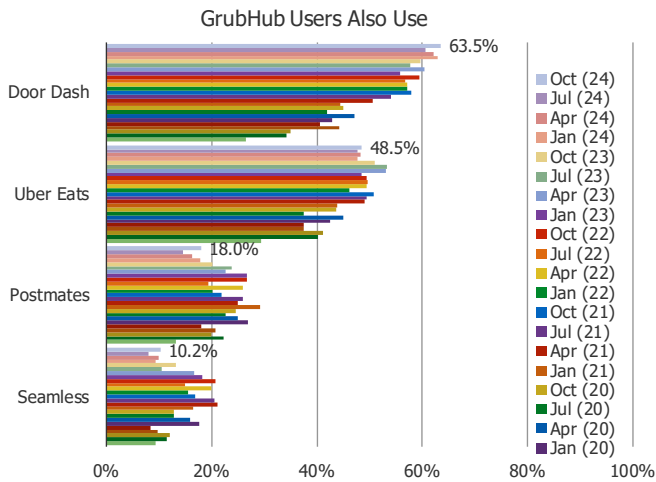
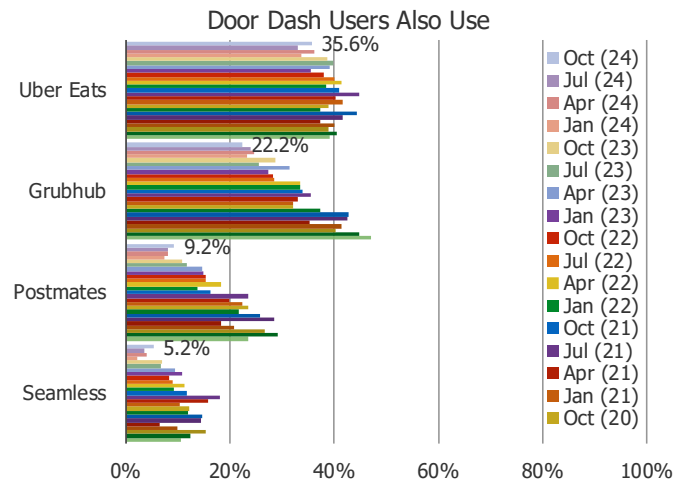
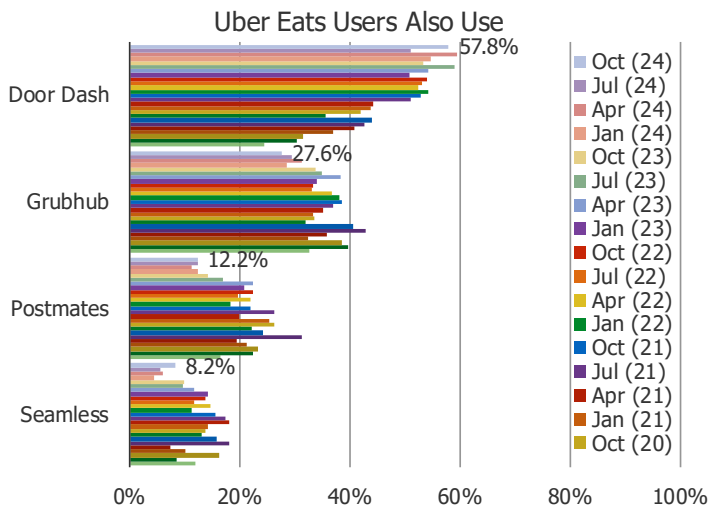
DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING PLATFORMS FOR ORDERING TAKEOUT FOOD DELIVERY?

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?

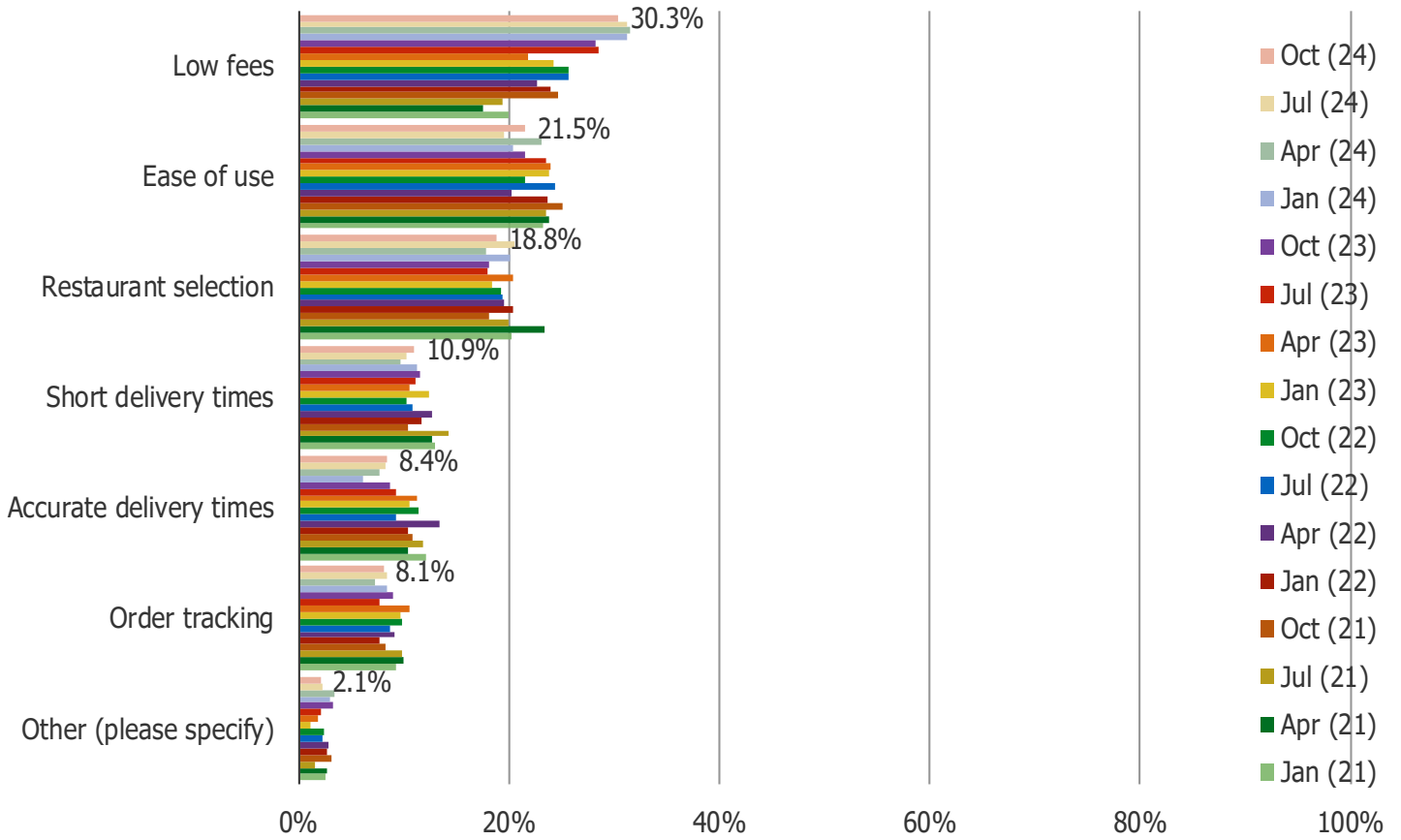
Posed to respondents who use food delivery apps.



	N=
Uber Eats	292
Door Dash	469
Seamless	40
Grubhub	164
Postmates	53

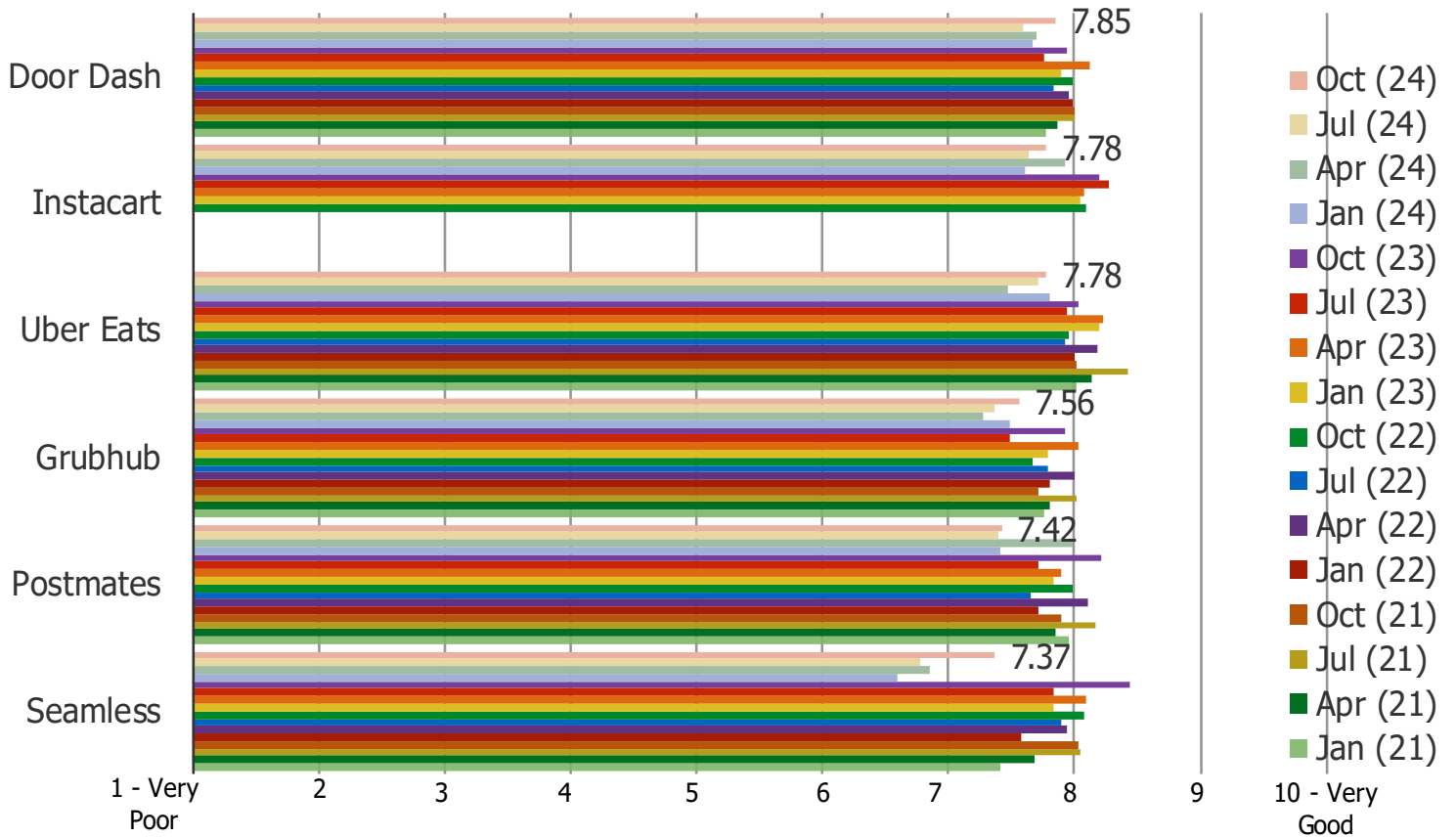
WHAT IS THE MOST IMPORTANT FEATURE IN DECIDING WHICH FOOD DELIVERY/TAKEAWAY APP TO USE?

Posed to respondents who use food delivery apps.



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

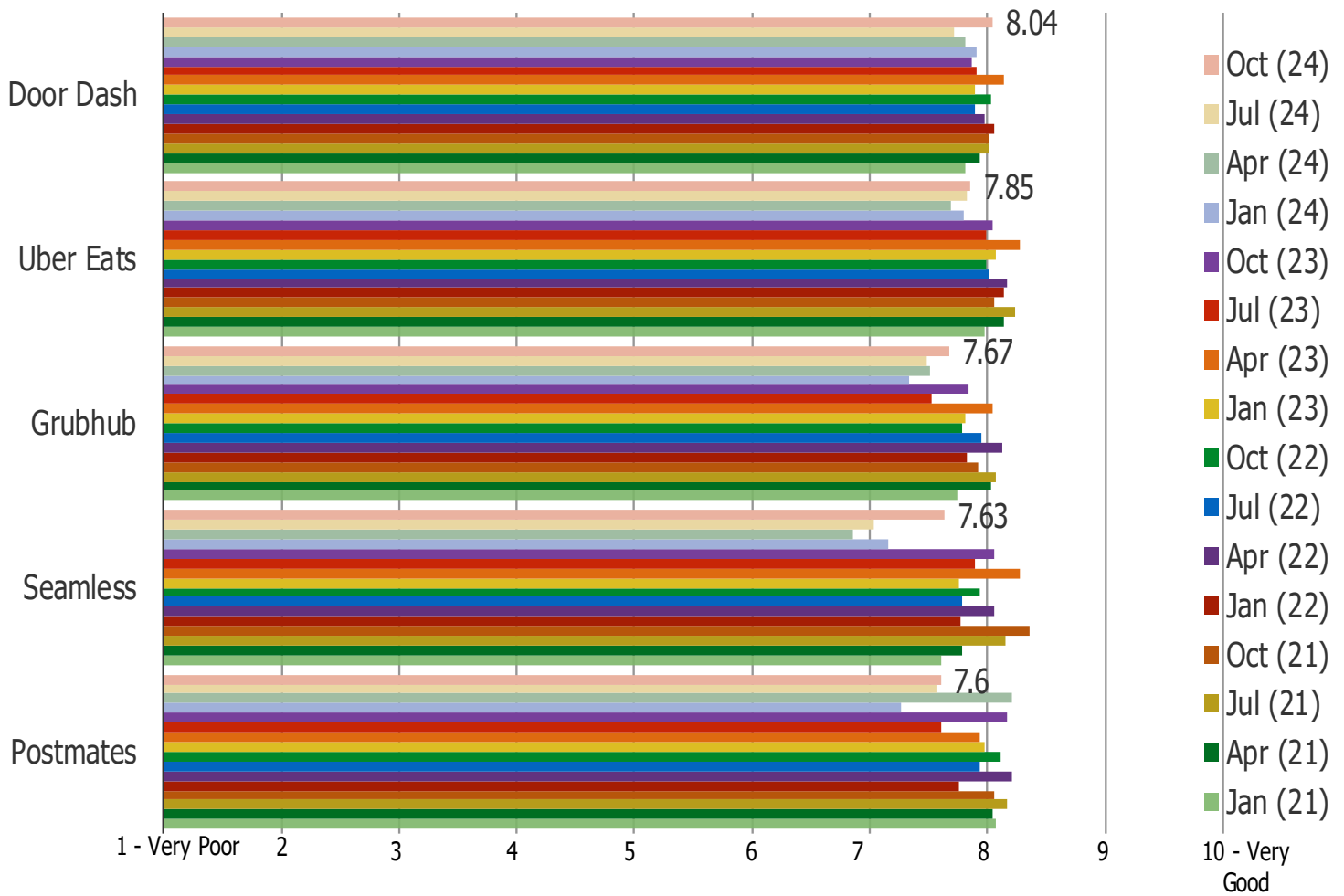
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	335
Door Dash	497
Seamless	35
Grubhub	197
Postmates	87
Instacart	132

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

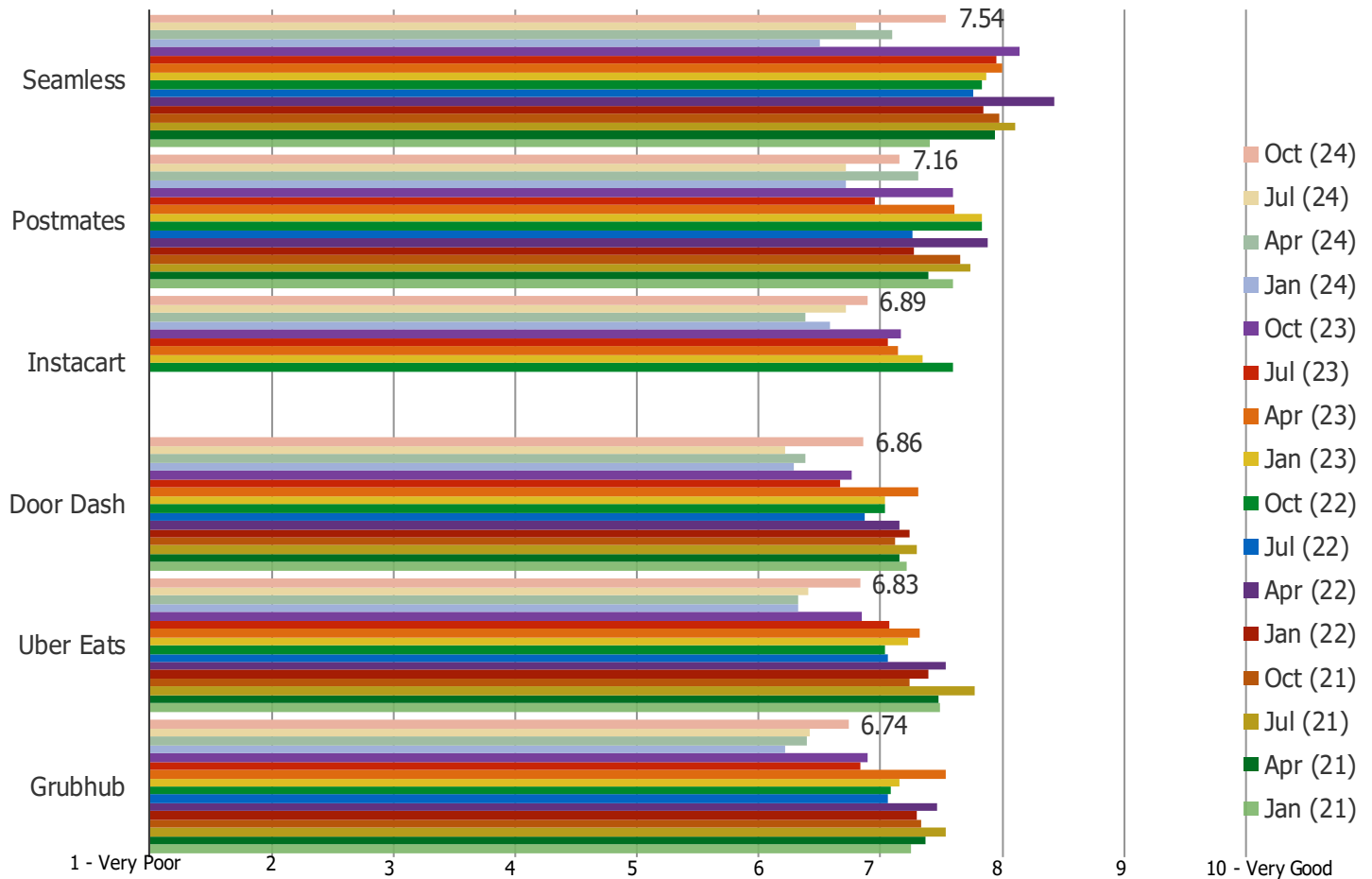
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	335
Door Dash	497
Seamless	35
Grubhub	197
Postmates	87
Instacart	132

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

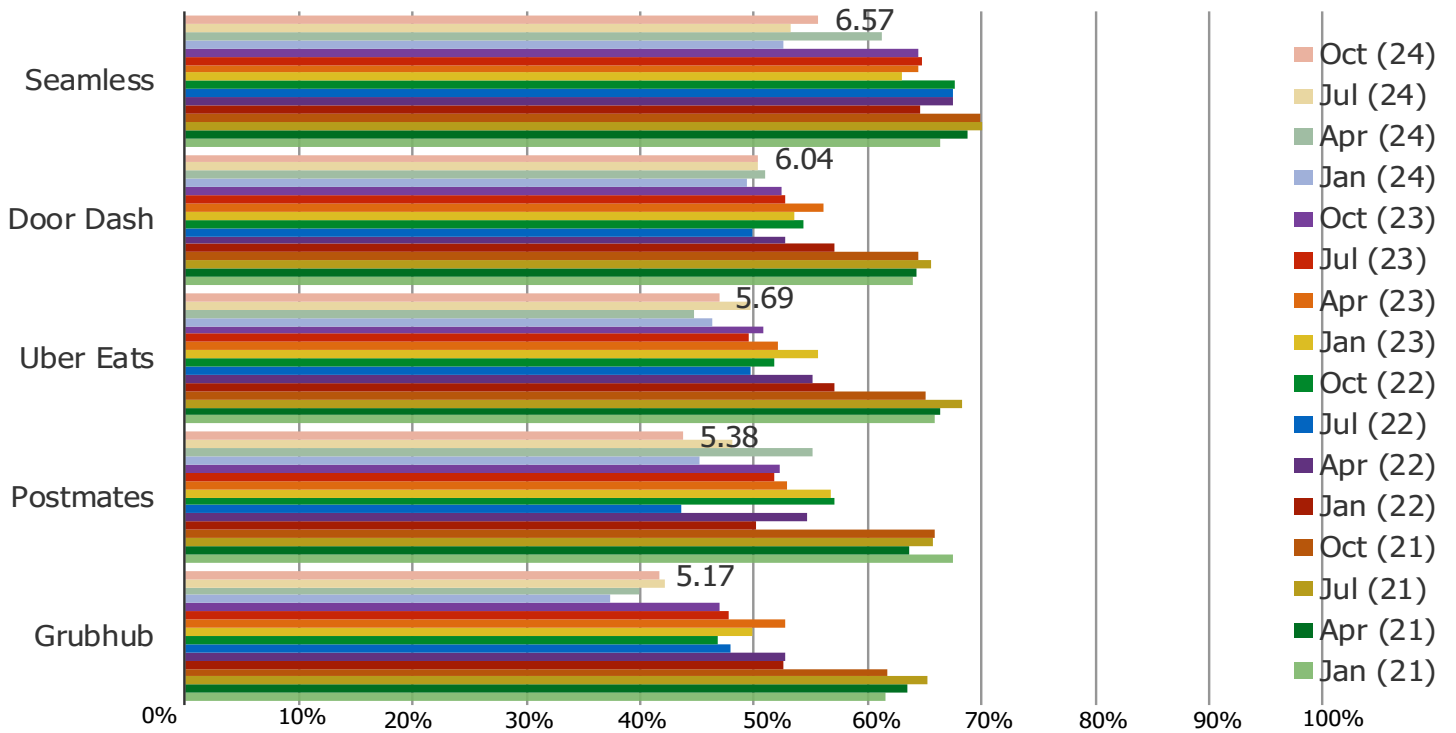
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	335
Door Dash	497
Seamless	35
Grubhub	197
Postmates	87
Instacart	132

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

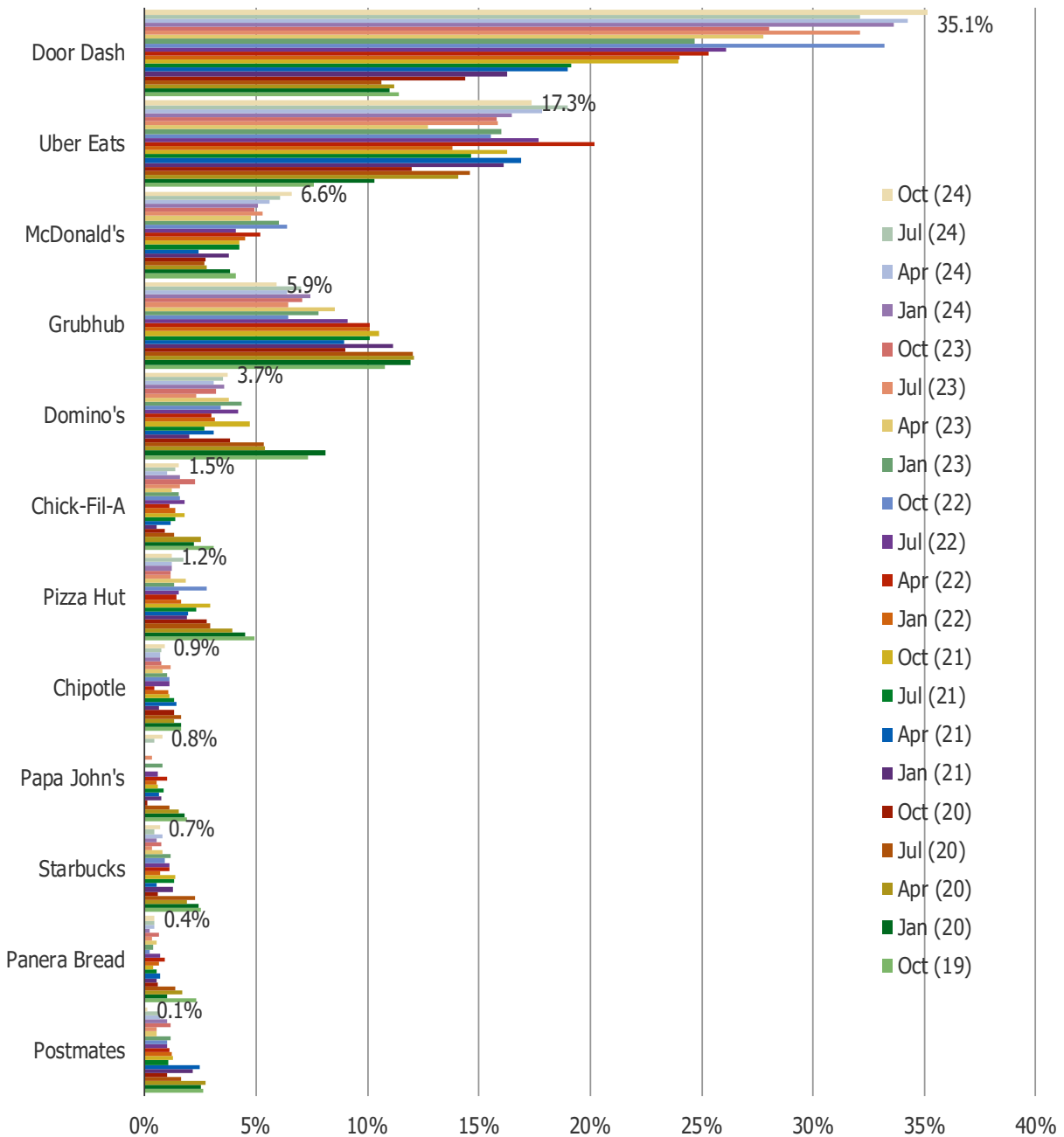
Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	335
Door Dash	497
Seamless	35
Grubhub	197
Postmates	87
Instacart	132

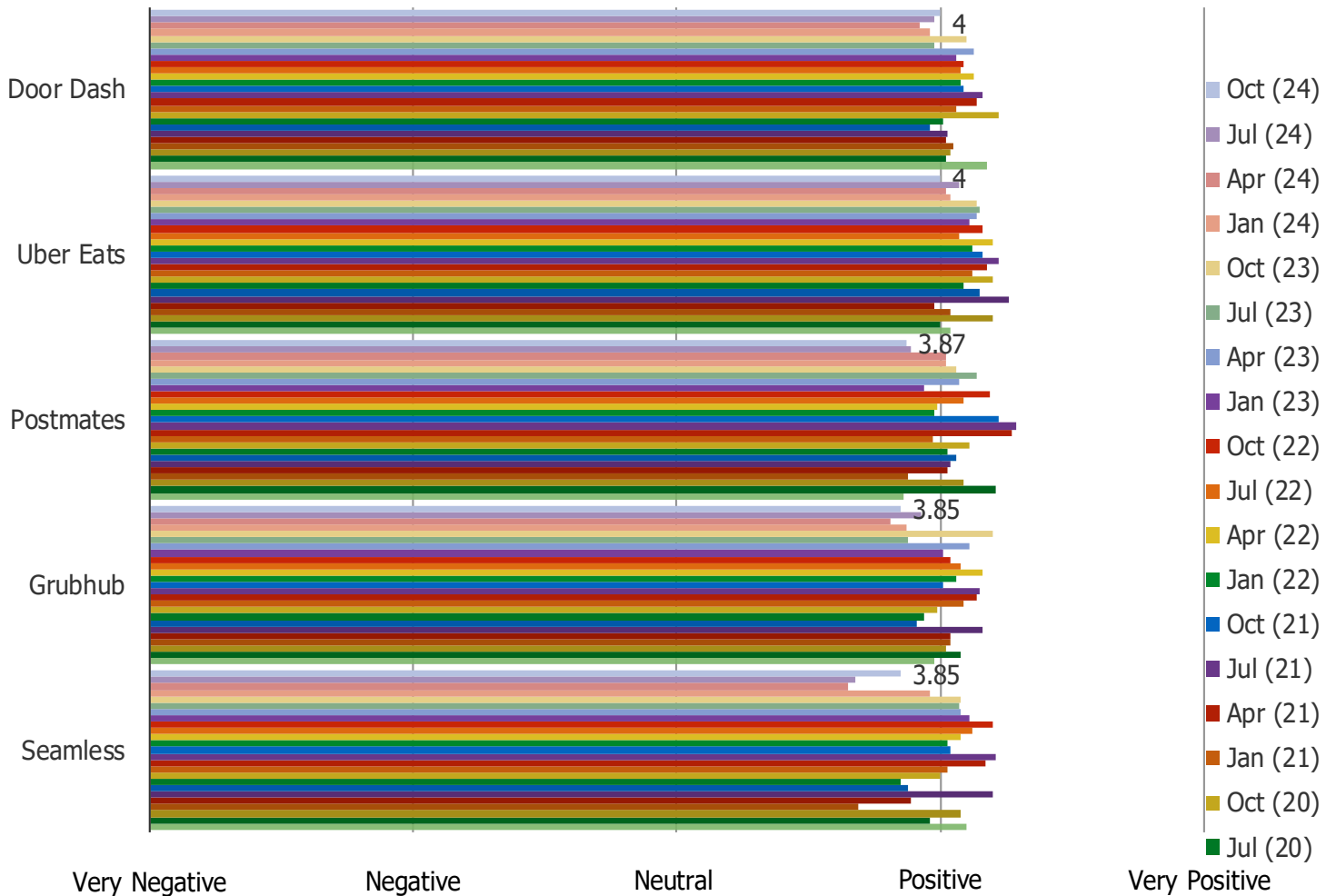
WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



WHAT IS YOUR OPINION OF THE PLATFORM?

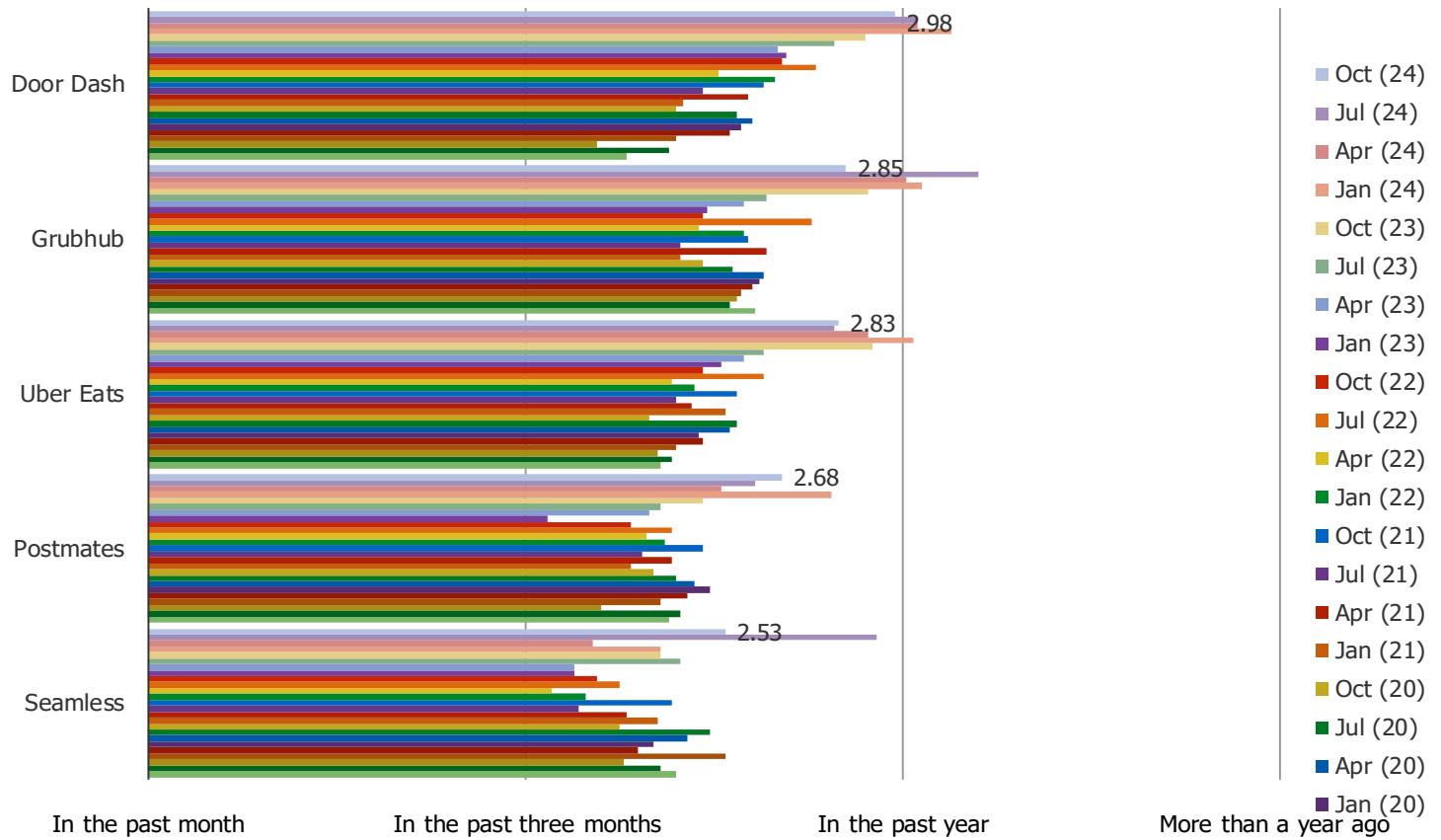
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	292
Door Dash	469
Seamless	40
Grubhub	164
Postmates	53

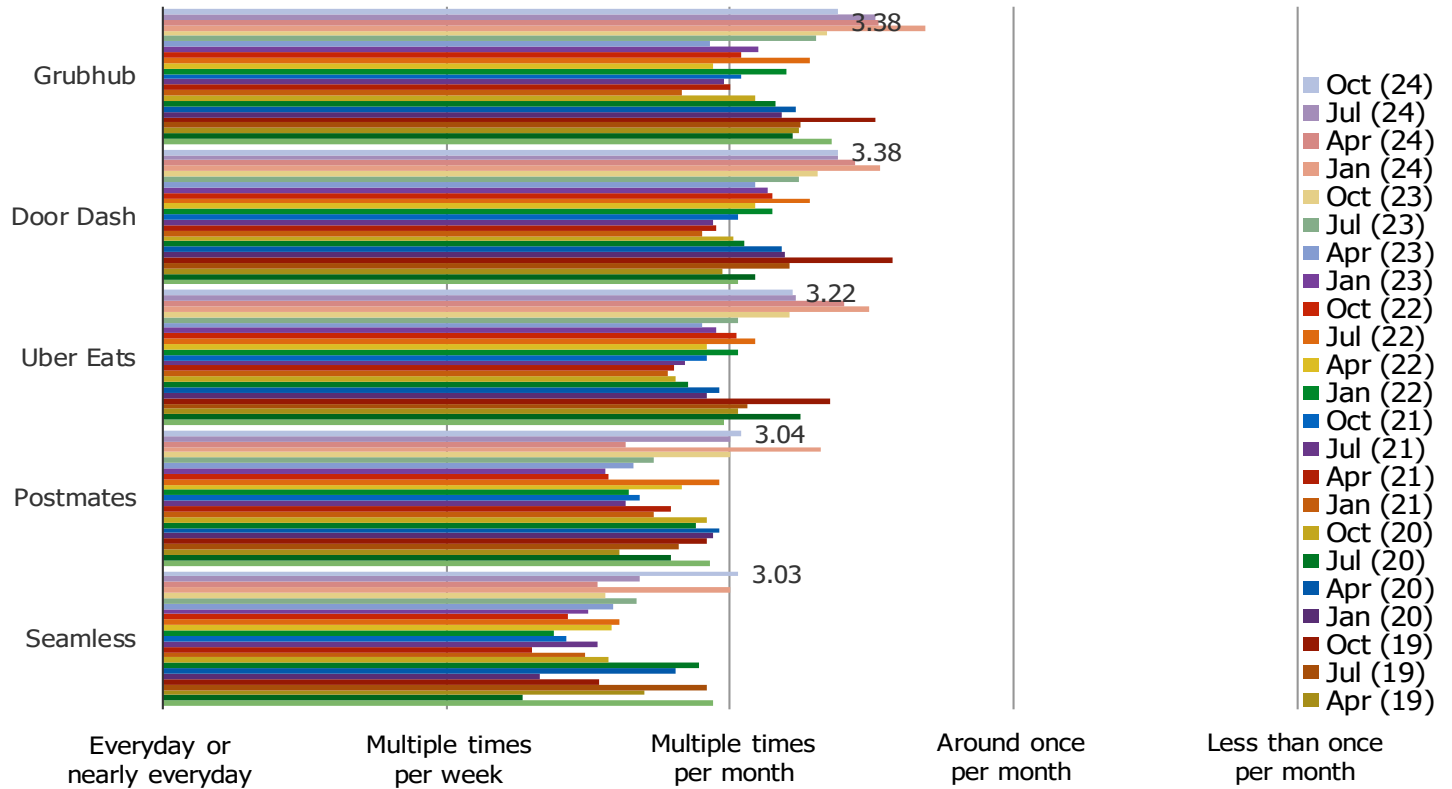
WHEN DID YOU FIRST START USING THIS PLATFORM?

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



HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

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

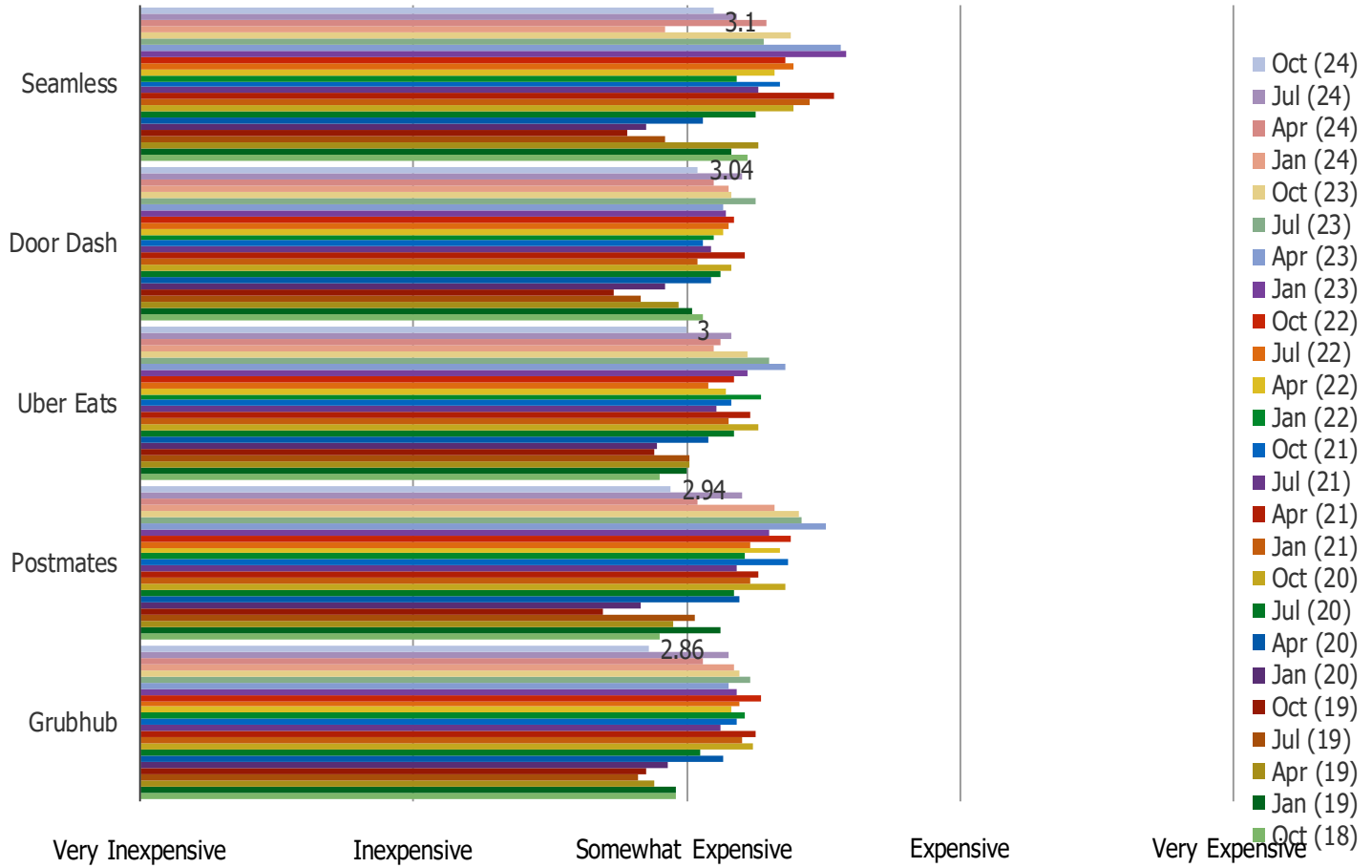


More Frequent

	N=
Uber Eats	292
Door Dash	469
Seamless	40
Grubhub	164
Postmates	53

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

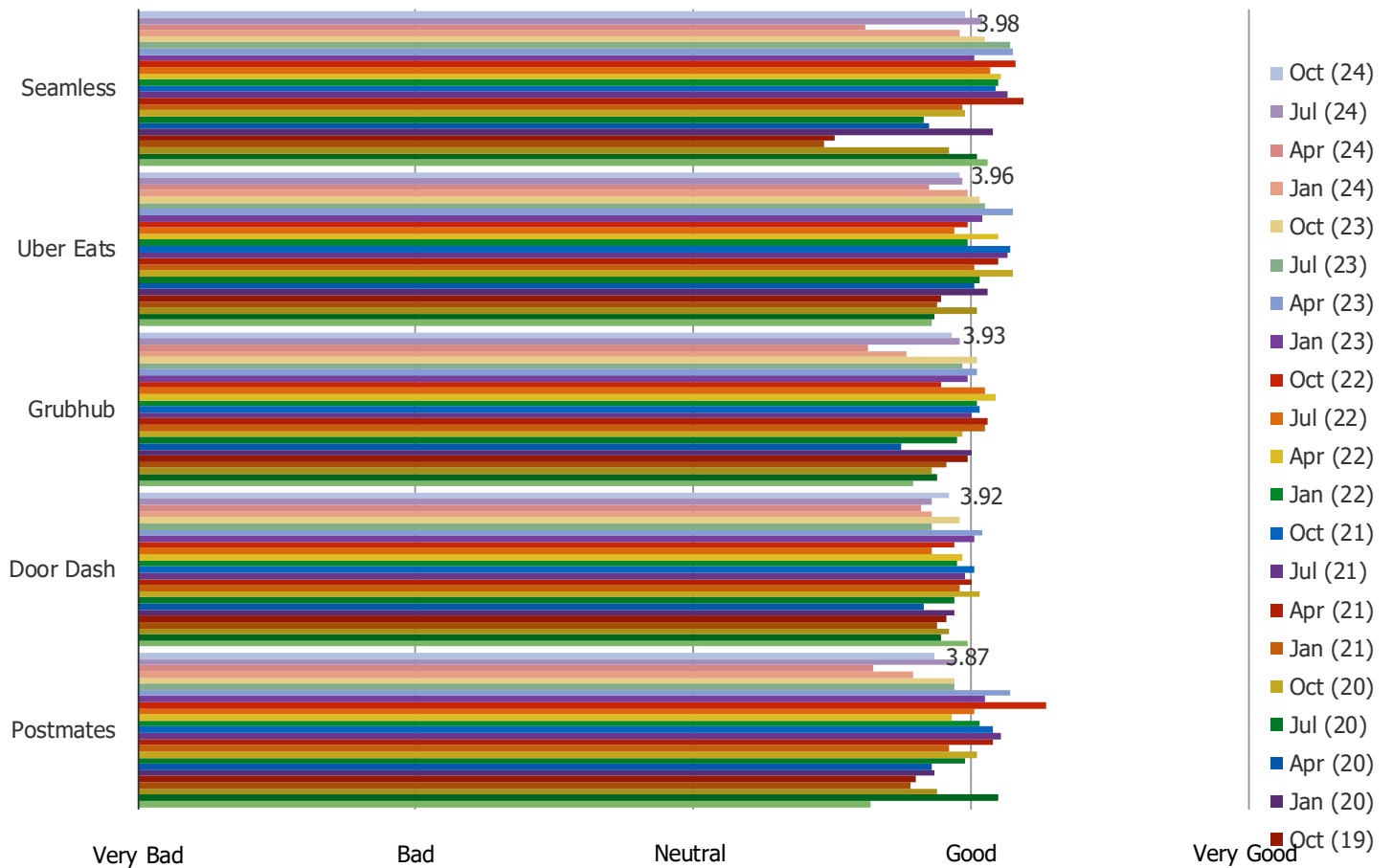
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	292
Door Dash	469
Seamless	40
Grubhub	164
Postmates	53

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

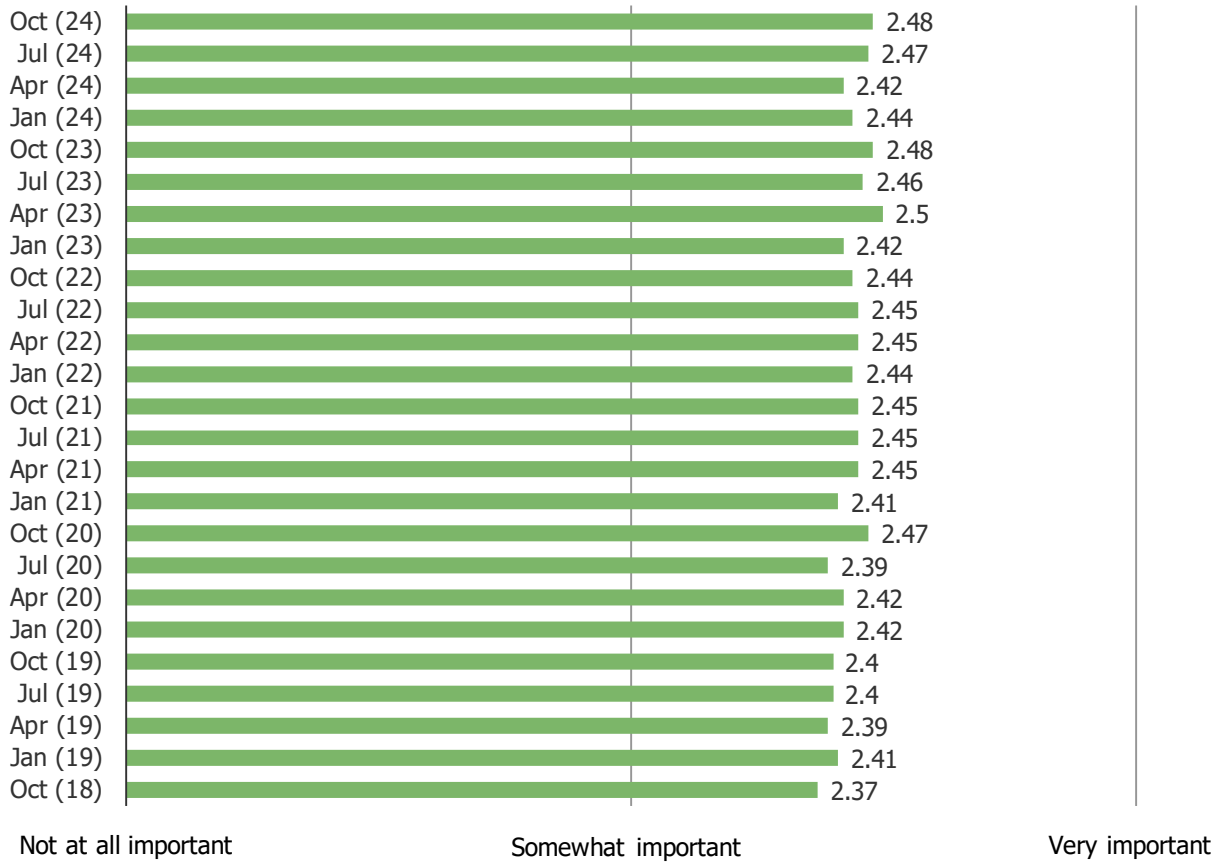
Posed to respondents who regularly or occasionally use each of the following apps.



	N=
Uber Eats	292
Door Dash	469
Seamless	40
Grubhub	164
Postmates	53

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?

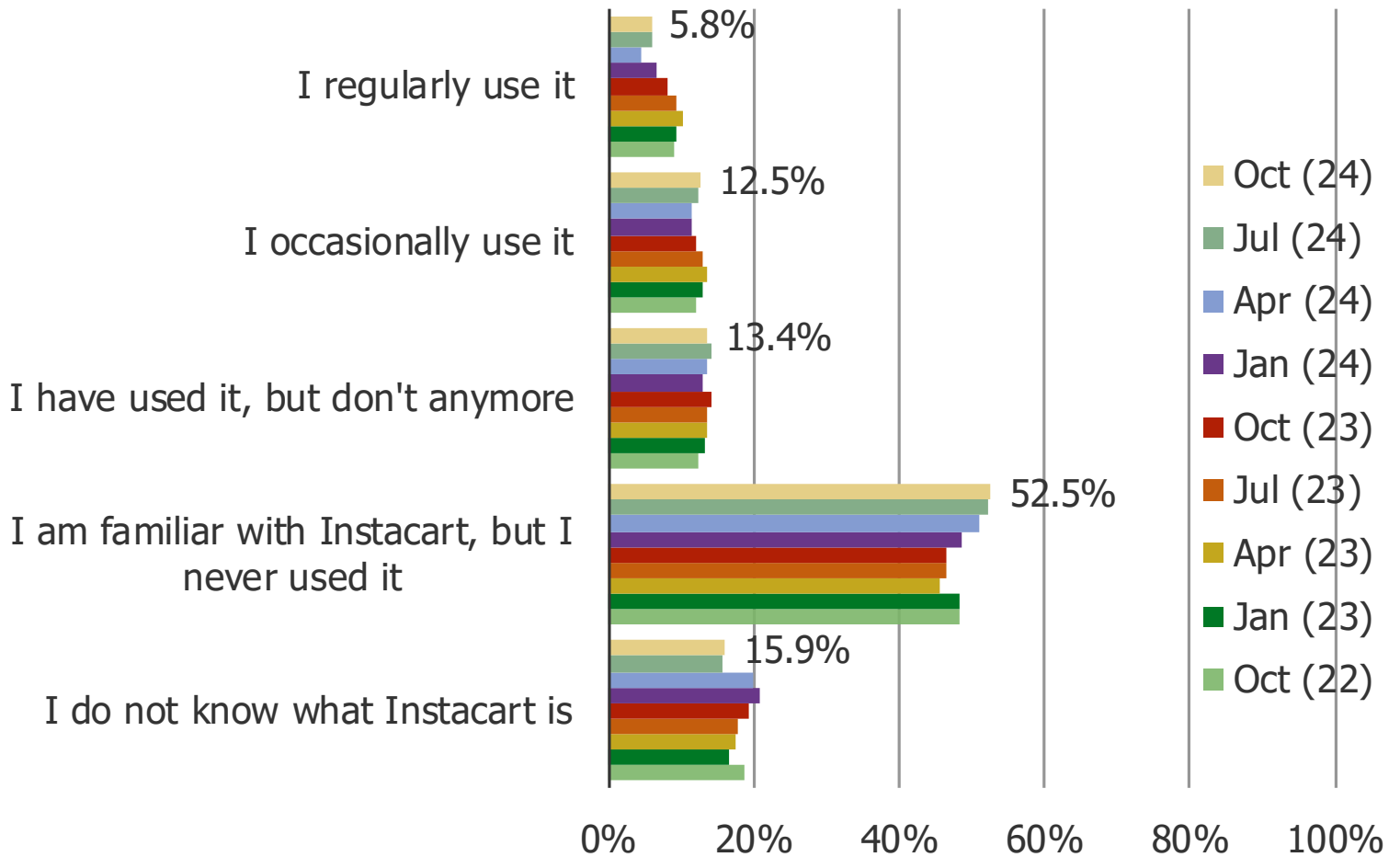
Posed to respondents who regularly or occasionally use each of the following apps.



INSTACART DEEPER DIVE

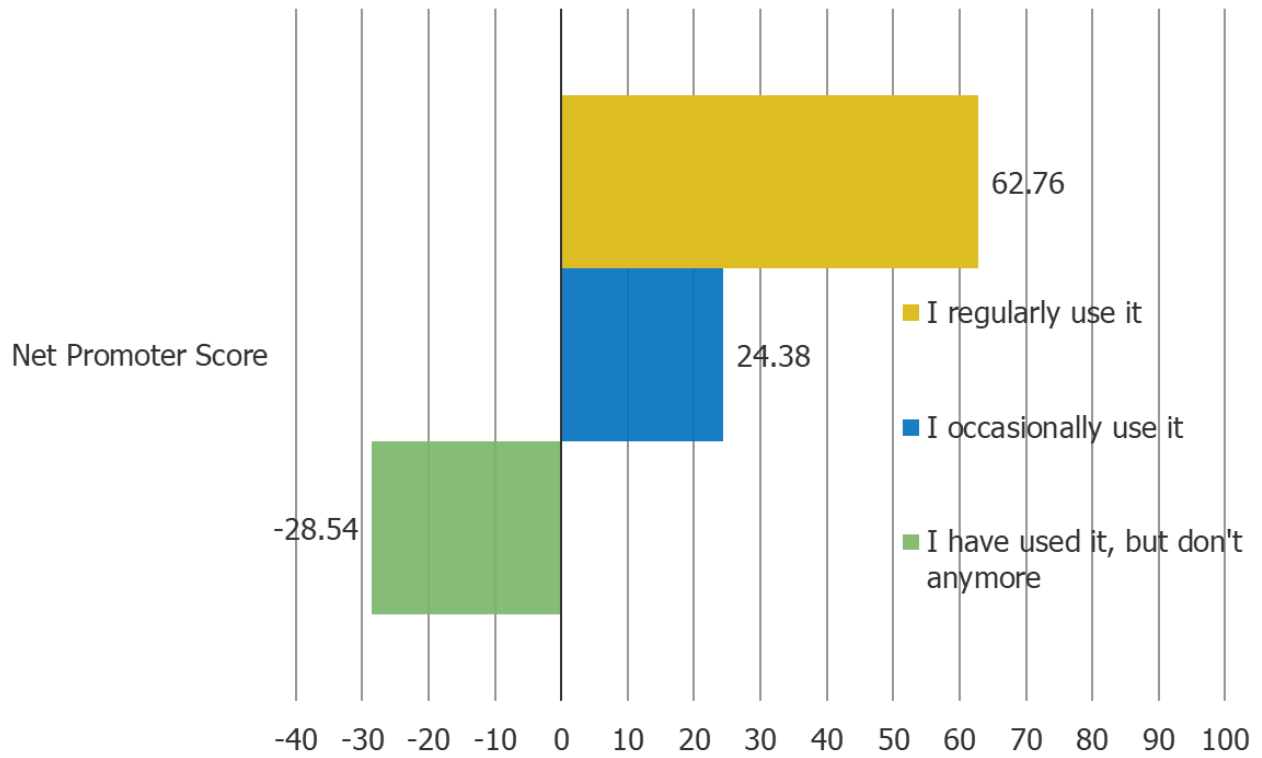
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH THE APP, INSTACART?

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 ALL waves to achieve larger N sizes...

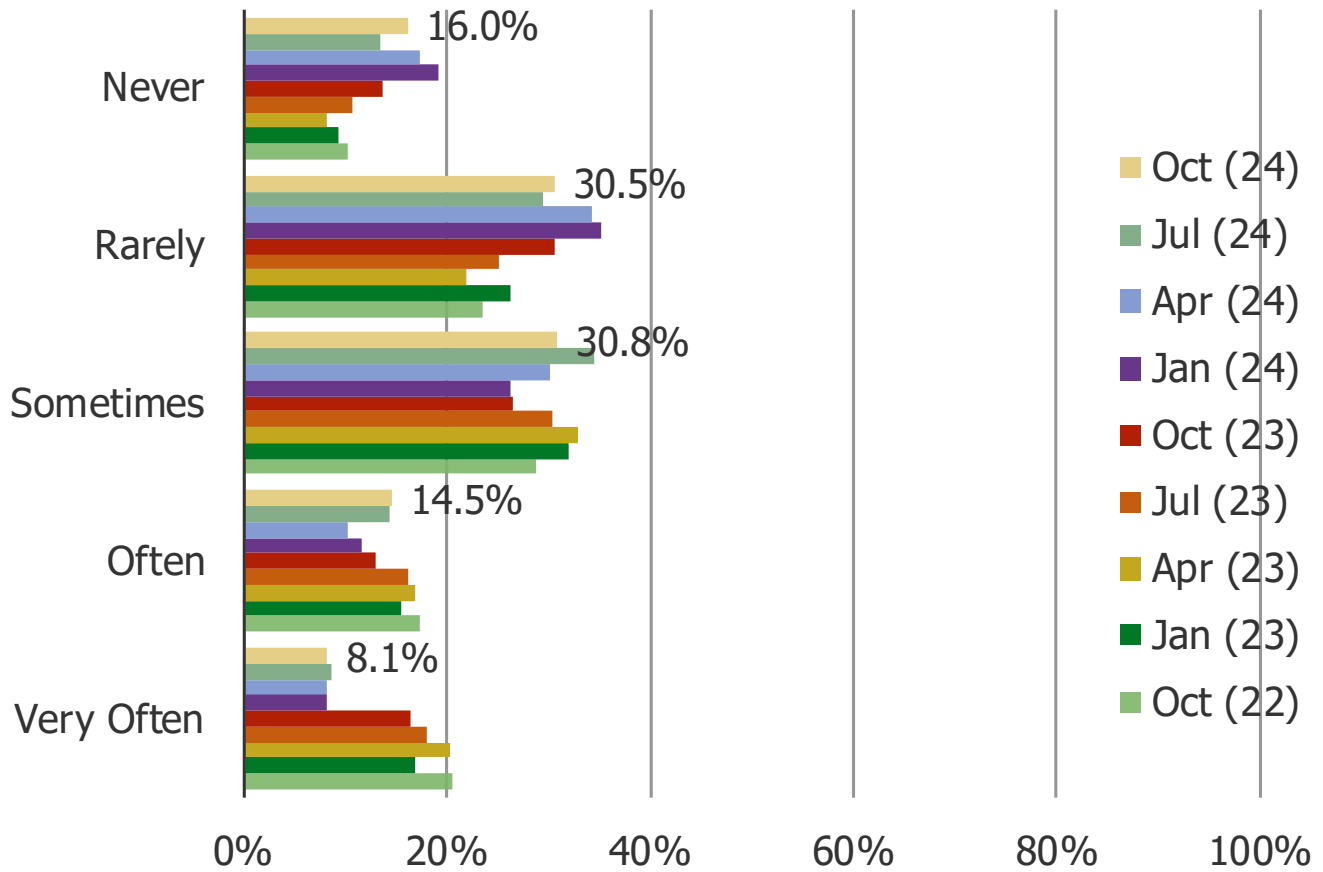
Have used it, but don't anymore: N = 1570

I occasionally use it: N = 1448

I regularly use it: N = 897

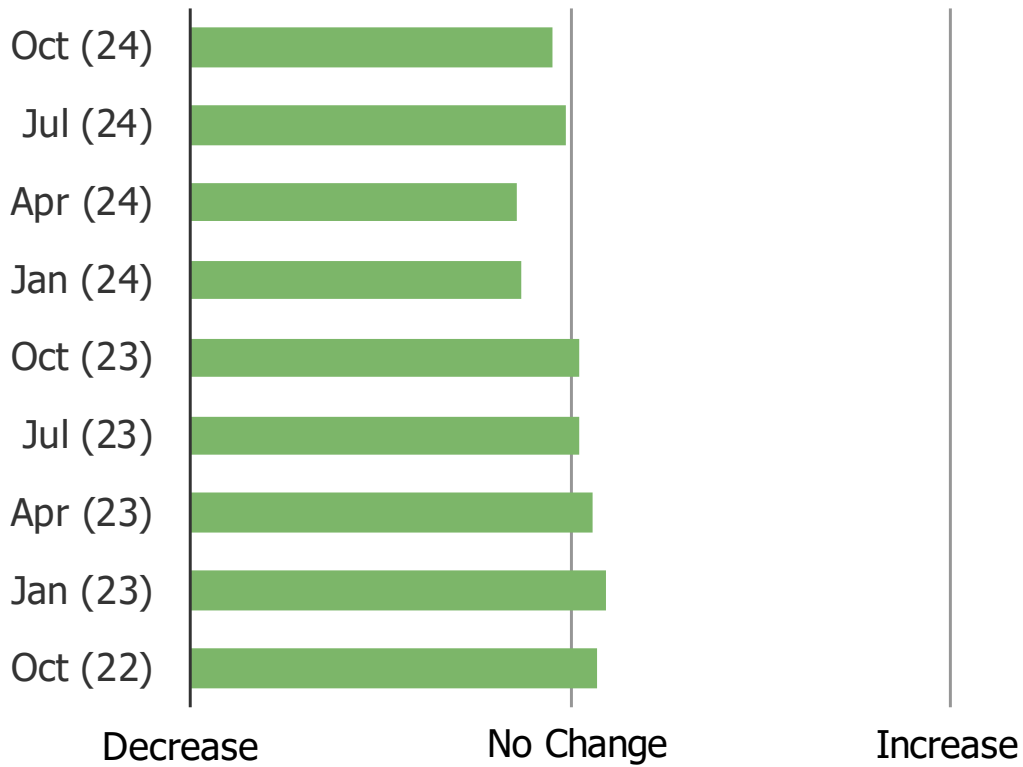
HOW OFTEN DO YOU USE INSTACART?

Posed to all respondents who have ever used Instacart.

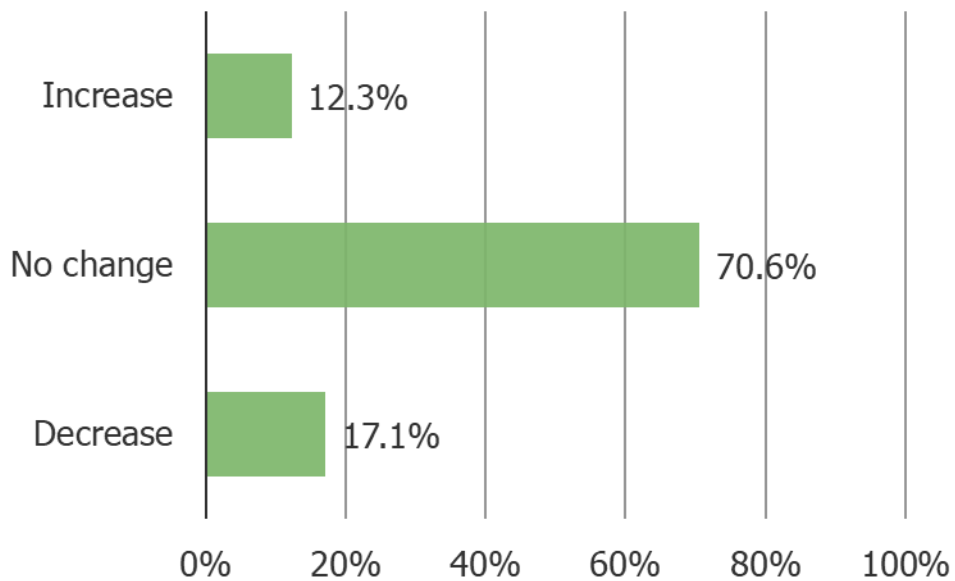


DO YOU EXPECT TO INCREASE OR DECREASE YOUR USAGE OF INSTACART GOING FORWARD?

Posed to all respondents who have ever used Instacart (N = 391)



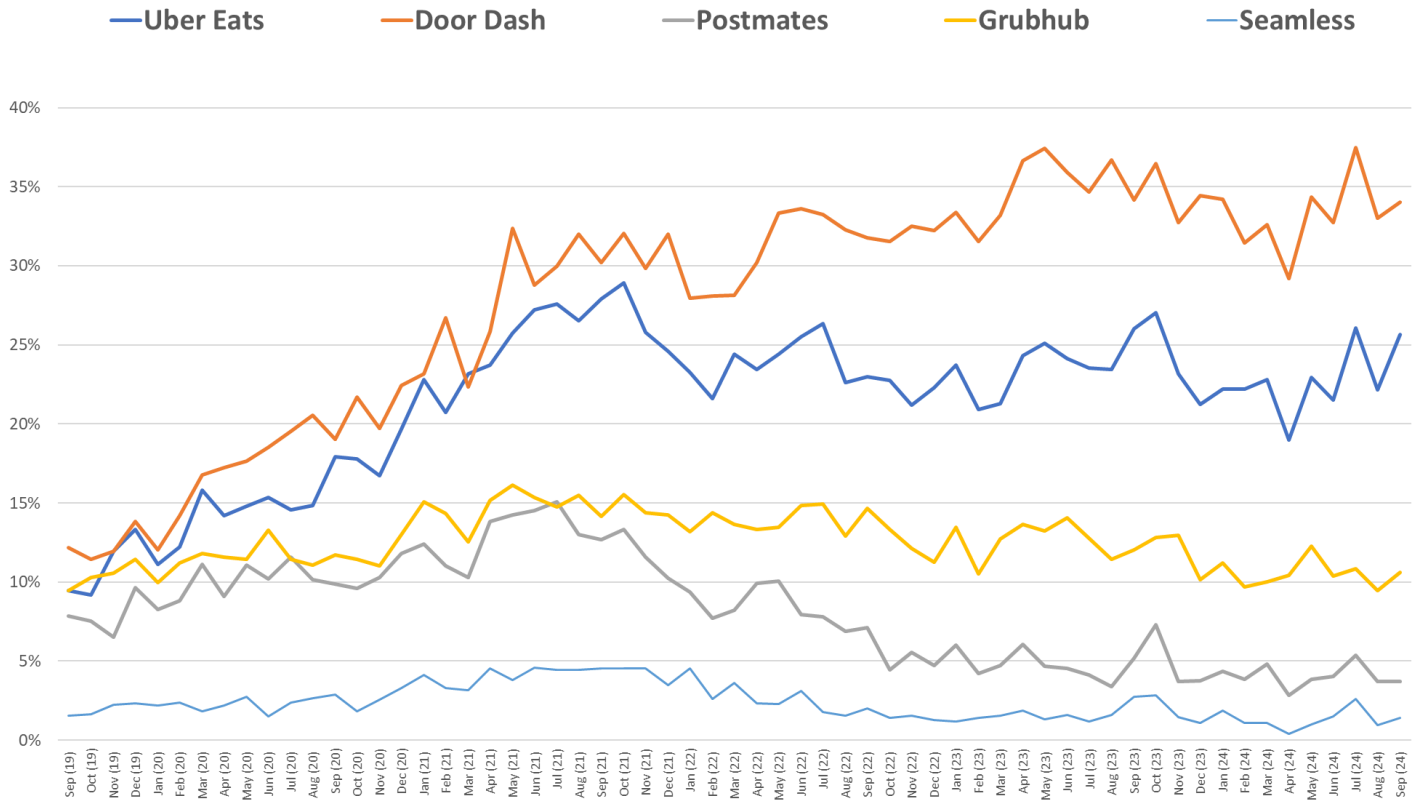
October 2024 Data



MONTHLY DATA

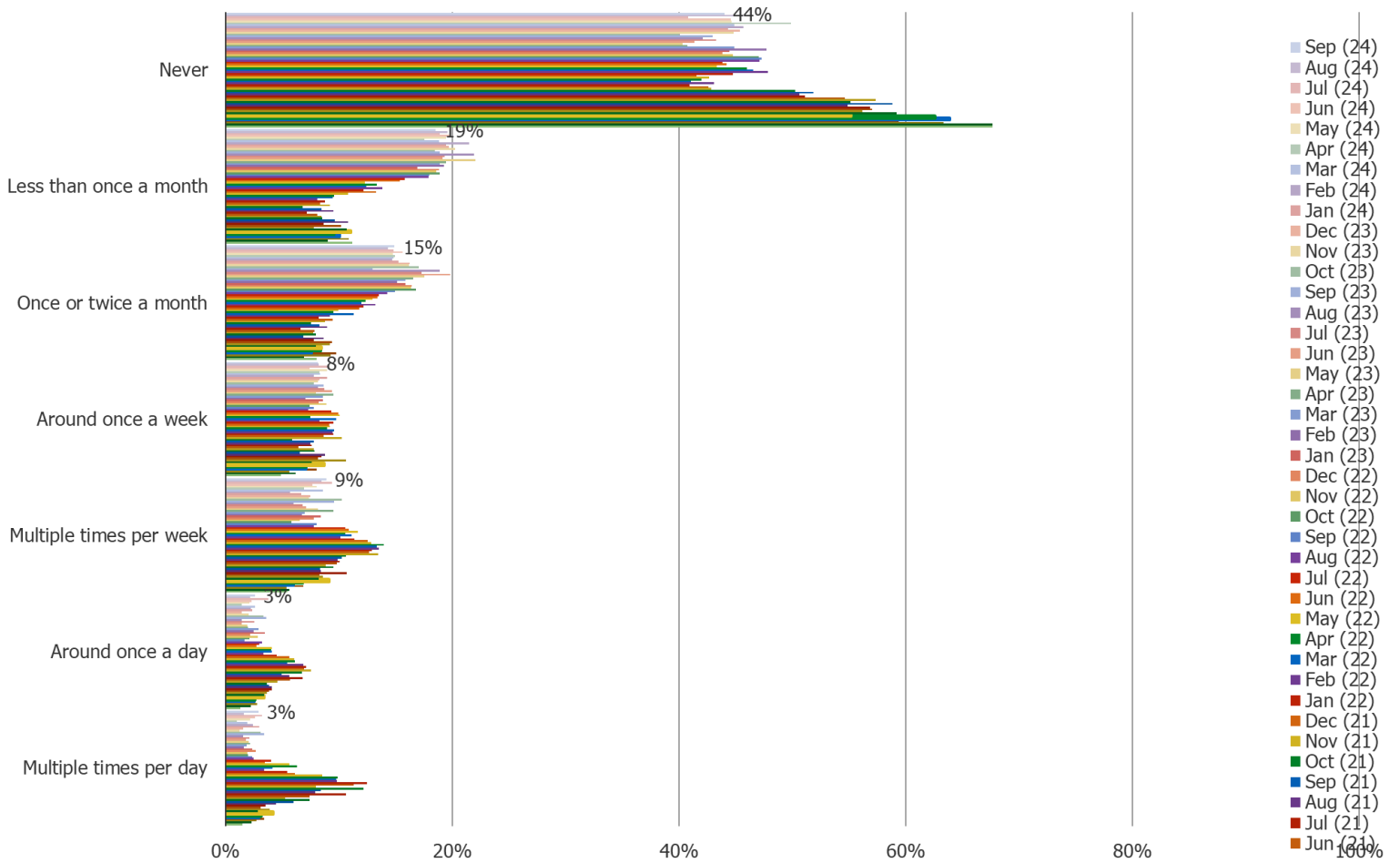
DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOOD DELIVERY SITES/APPS? SELECT ALL

Posed to all respondents.



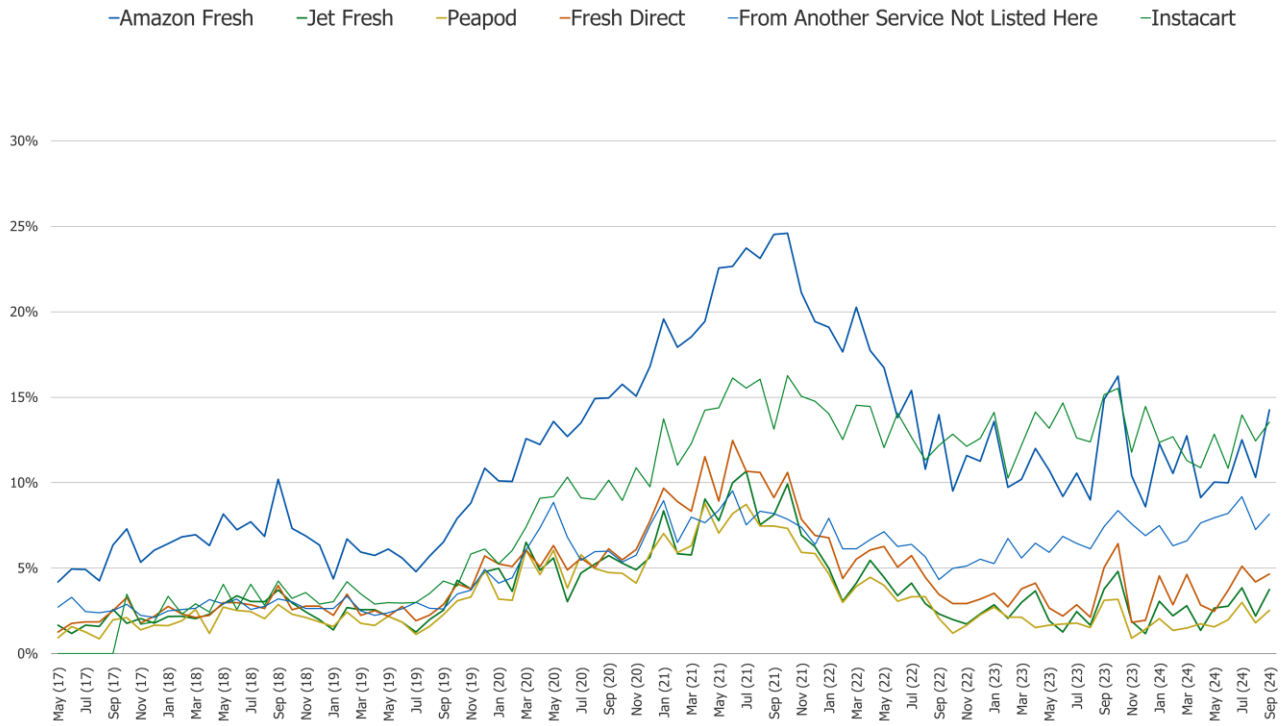
HOW OFTEN DO YOU USE FOOD DELIVERY APPS?

Posed to all respondents.



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

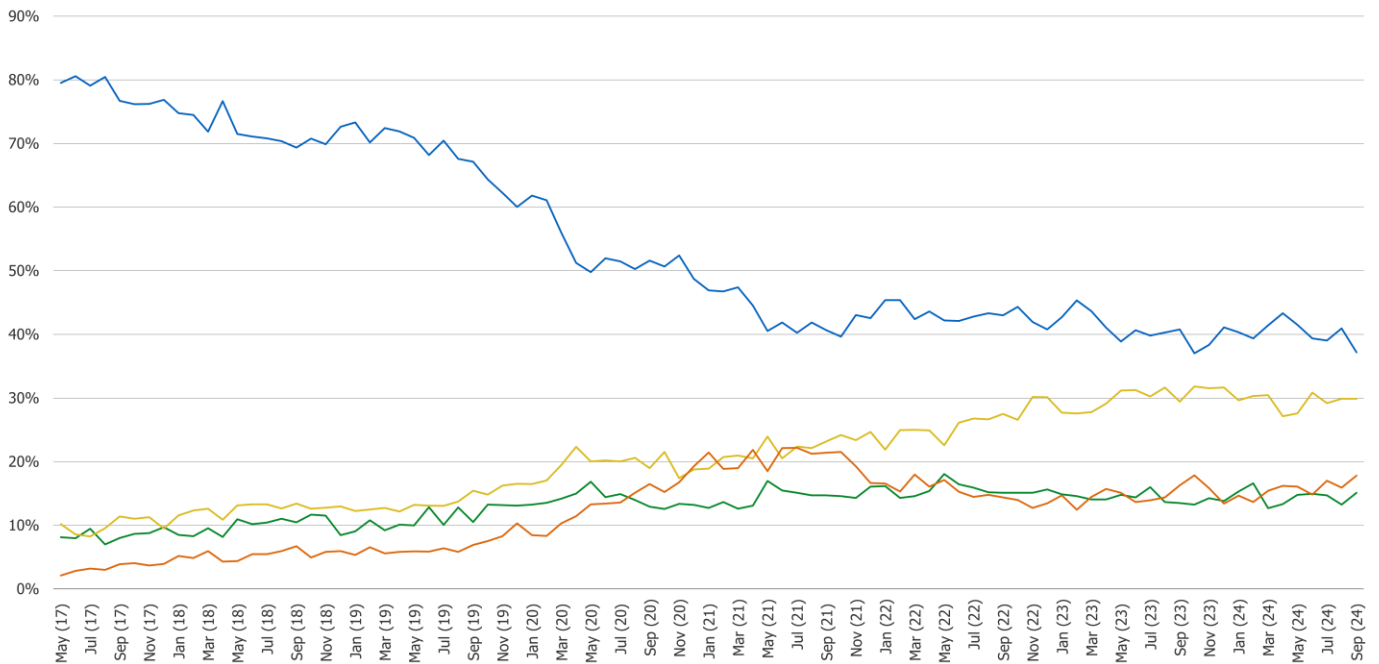
Posed to all respondents.



PLEASE CHARACTERIZE YOUR EXPERIENCE WITH ORDERING GROCERIES ONLINE:

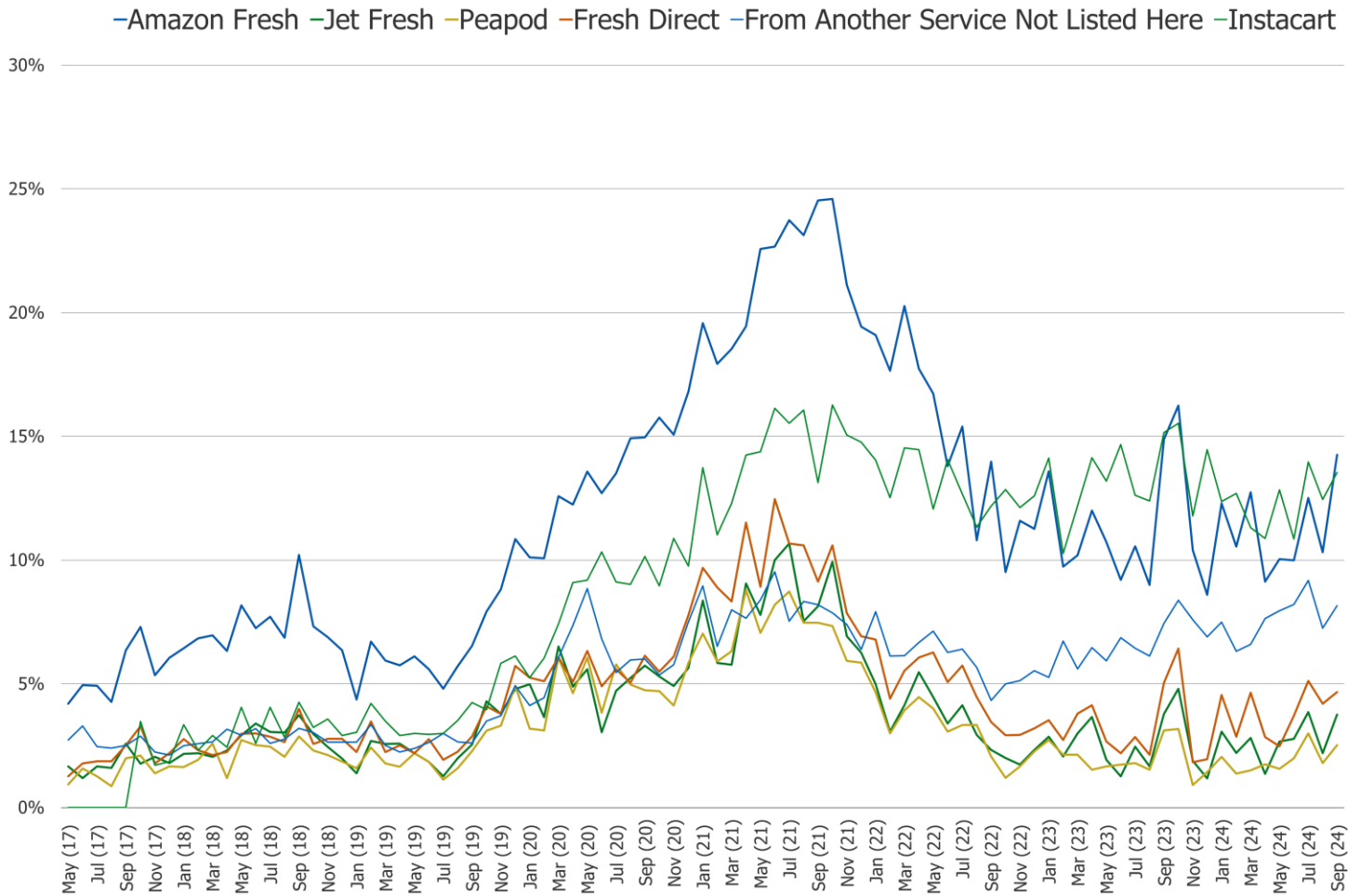
Posed to all respondents.

- 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



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

Posed to all respondents.



HAVE YOU HAD MEAL KITS DELIVERED FROM ANY OF THE FOLLOWING IN THE PAST MONTH?

Posed to all respondents.

—Blue Apron —Sun Basket —HelloFresh —From another meal kit service not listed here

