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Behavior-Driven Research.

RESTAURANT & GROCERY DELIVERY APP USAGE

Background & Methodology

Background & Research Objectives

- Understand behaviors around users of select Restaurant and Grocery delivery apps from the start of covid vs now.

- How has usage changed during covid vs now?

- What is the share of new users on each app? What motivated the download?

- How satisfied are users with the app? What is their experience?

- How has purchasing decisions changed? What is the impact on brand loyalty?

Methodology Overview

- MFour utilized its Surveys on the Go Mobile App (SOTG) to trigger surveys based on observed digital behavior and usage of key apps.

2 Key Groups

- Restaurant Delivery apps: DoorDash, UberEATS, Postmates

- Grocery Delivery apps: Amazon, Walmart, Instacart

Data Collection Period:

- Wave 1: March 23rd, 2020

- Wave 2: July 11th, 2022

Sample Specifications

- N=3,000 with n of 1500 per key group; n=500 per app

- 50/50 Gender split
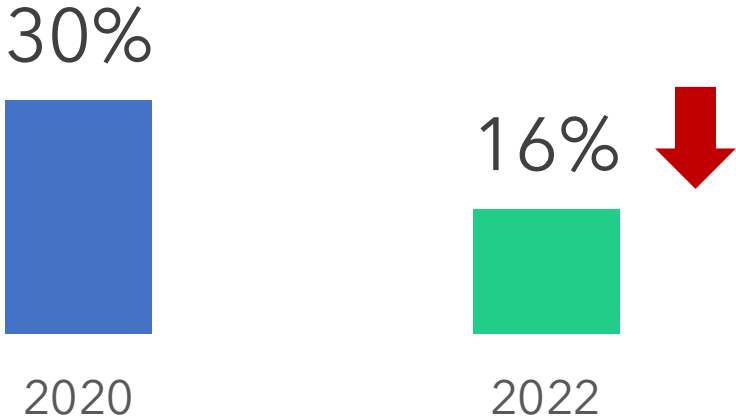
- 50/50 Under / Over 35

- Nationally Representative

FOOD DELIVERY APPS

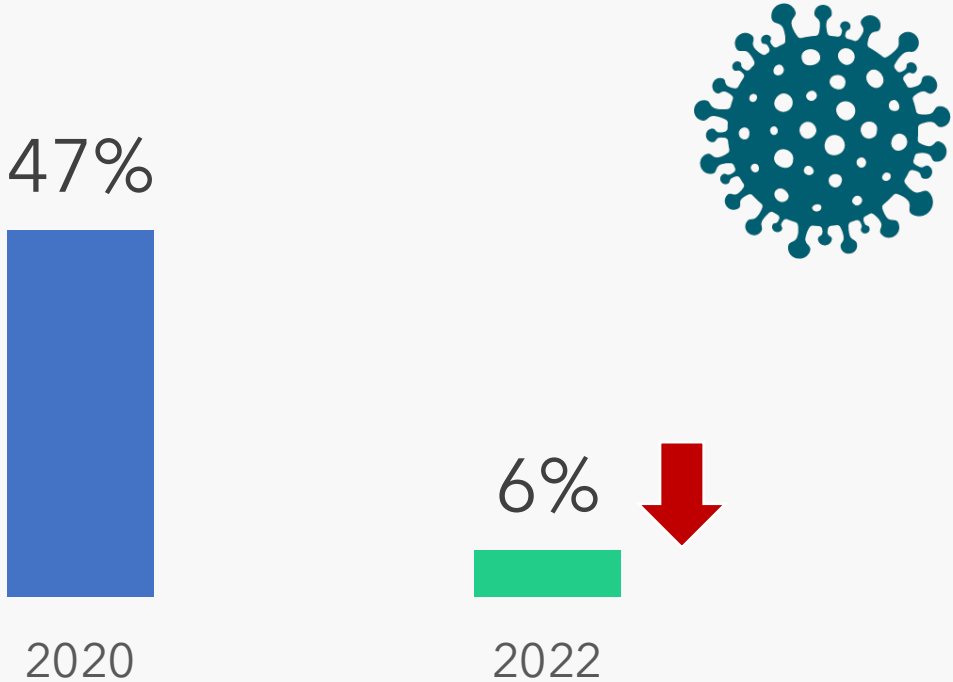# COVID-19 Drove Demand for Food Delivery Services

In 2022, there are significantly fewer downloads for food delivery apps related to COVID-19 concerns.

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Food Delivery App – New Users

30%

16% ⬇

2020   2022

Delivery App Downloads Due to COVID-19

47%

6% ⬇

2020   2022

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Preference Continues to Drive Food Selection in 2022

Food safety concerns have decreased and is not a top factor for restaurant selection. Diners choose options based on their preferences for cuisine, familiarity and family.

Food Delivery Concerns

30%
2020

11% ↓
2022
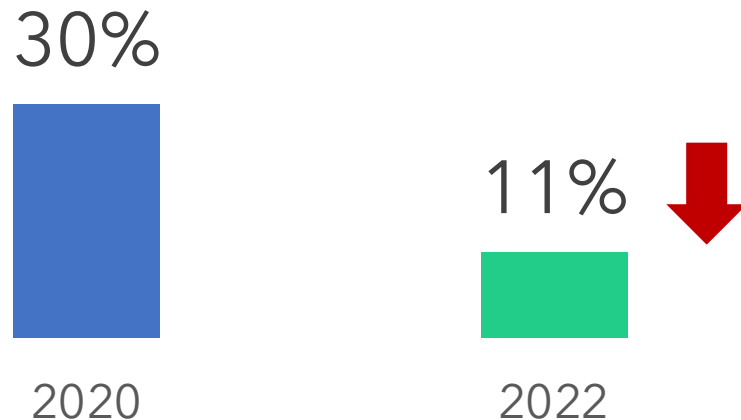
Restaurant Selection Drivers

|	2020	2022
I want to order the type of food from this restaurant	32%	32%
It is the place I usually order from and trust	14%	15%
It's what my family and kids wanted	12%	12%
Had free / low delivery fees	12%	10%
Best value / most affordable	7%	9%
Had shortest delivery window	6%	7%
Had special offer or promotion	5%	7%
Recommended / had good reviews	4%	4%
Had "contactless delivery" option	3%	4%

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GROCERY DELIVERY APPS

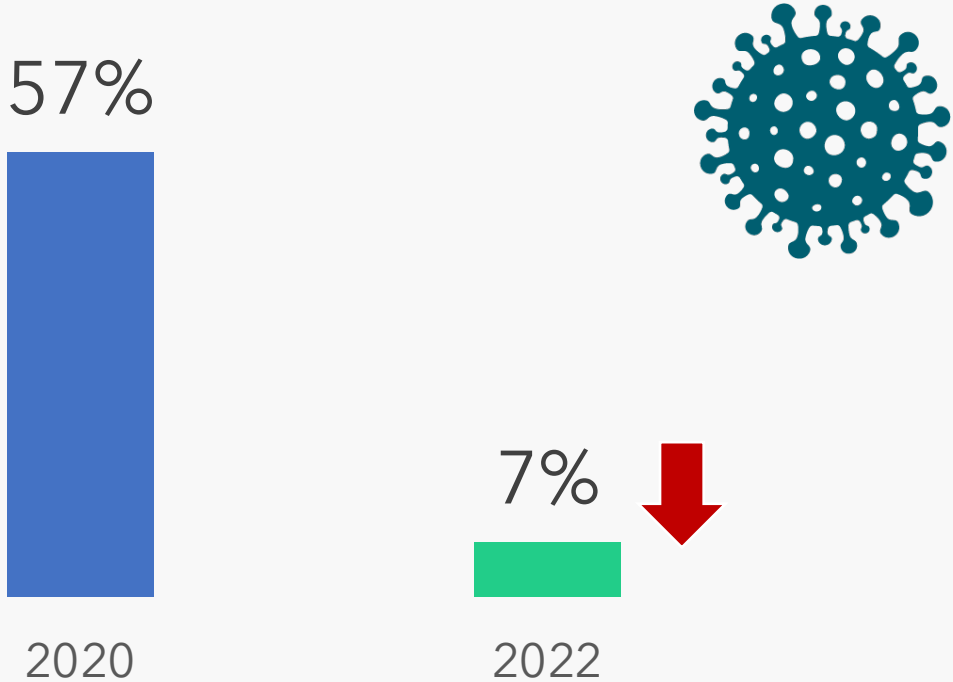# Grocery Delivery App Usage Significantly Down from 2020

Like food apps, the demand for grocery apps have declined over the past two years. The easing of restrictions allow more users to return to stores and rely less on apps.

Grocery Delivery App – New Users
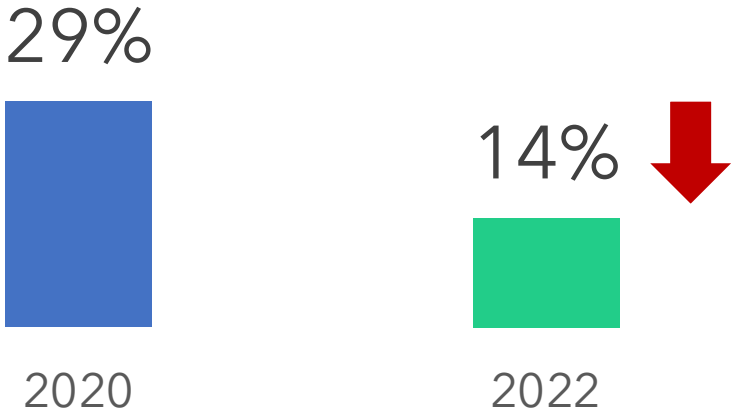
29%
2020

14%
2022

Grocery App Downloads Due to COVID-19

57%
2020

7%
2022

7

Shoppers Have Fully Adopted Grocery Delivery Apps

Current users expect their usage of grocery delivery apps to increase if not remain the same. Walmart and Amazon users are driving the increased usage.

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Change in Usage – Current Users

- **Much/Somewhat more** (green)
- **About the same** (gray)
- **Much/Somewhat less** (red)

	2020	2022		Instacart	Walmart	Amazon
Much/Somewhat more	53%	49%		46%	51%	52%
About the same	32%	38%		36%	38%	38%
Much/Somewhat less	15%	12%		18%	11%	10%

2022

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It's just better.