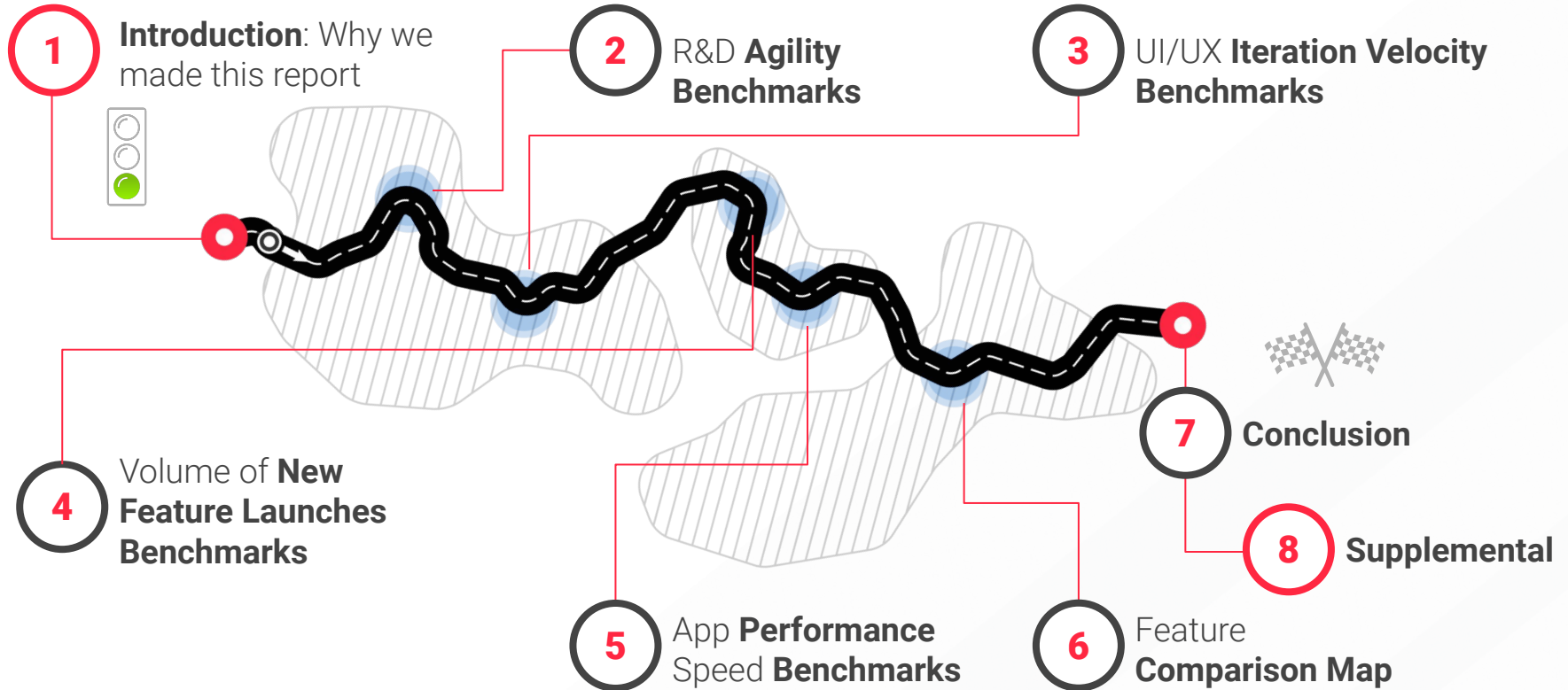


Global Food Delivery Apps In 2023



How the pace of innovation in the food delivery space is increasing, and **what this means for teams trying to keep track of the evolving market**

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1. Introduction



Leaders in Strategy, Product, Marketing and Engineering at **Fortune 500** companies

rely on **Watchful** to create better products by giving them insights on their competitors. **Watchful** provides unprecedented insights into your competitors, with data unavailable with any other provider in the market.



Product Intelligence

See what your competitors are working on, and how today's ideas and tests evolve into key features and new product releases



In-app Performance

Get full visibility into user flows and benchmark them against competition across key metrics throughout the customer journey



Marketing Intelligence

Explore how your competitors market to their customer segments through CRM, email and online campaigns



1. Introduction

Competition among food delivery apps is **becoming increasingly fierce.**



To keep customers loyal, apps within the food & delivery ecosystem are evolving at an unprecedented rate. The pace of innovation, the speed of the development cycles and **the sheer volume of new features and changes is astonishing**, compared to other B2C app-first industries.

Keeping up with the competitive landscape can be tough, and companies in the space are on a frenetic race to make better, faster, and more intuitive apps to become the “go-to” food delivery app for customers which can be easily swayed by alternatives that provide a better experience, unique features, or more interesting offers.



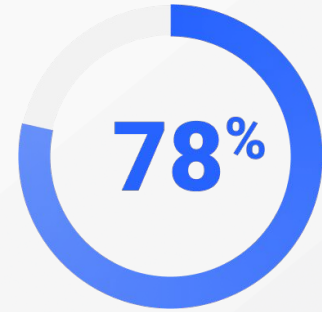
1. Introduction

Why we created **this report**

The online food delivery market has exploded over the past decade, and, as new entrants emerge attempting to capture market share, **existing food delivery apps will need to become increasingly sophisticated and agile to stay ahead of the game** through exceptional user experiences.

We created this report to look at the top Food Delivery apps' agility and speed across many factors, from app performance to speed of feature releases. By analyzing 8 popular apps around the world, this report is designed to help you benchmark and understand the pace and scale in which these key players are investing in Product Development to remain competitive.

We hope to give you enough insight to help answer the question: **is your team efficiently equipped to keep track of the innovation happening in the food & delivery space?**



...of food delivery product leaders say they **lack the ability to stay on top of competitor's product changes**



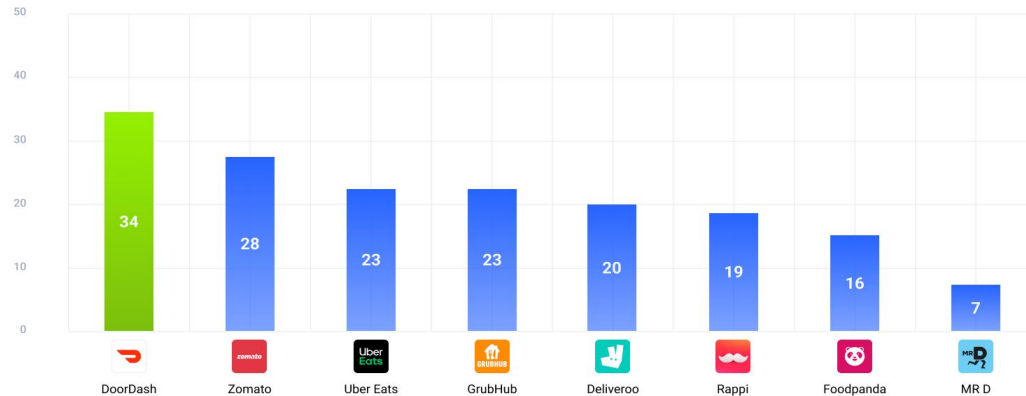
■ 2. R&D Agility



2. R&D Agility

The average release cycle for apps analyzed is a **new version every week**

No. Versions



Last 6 months



Leading With Engineering Speed

US market leader **DoorDash** has the fastest release cycle with a new app version released every 5 or 6 days

[Learn More...](#)



■ 3. Product Iteration Velocity

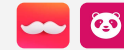
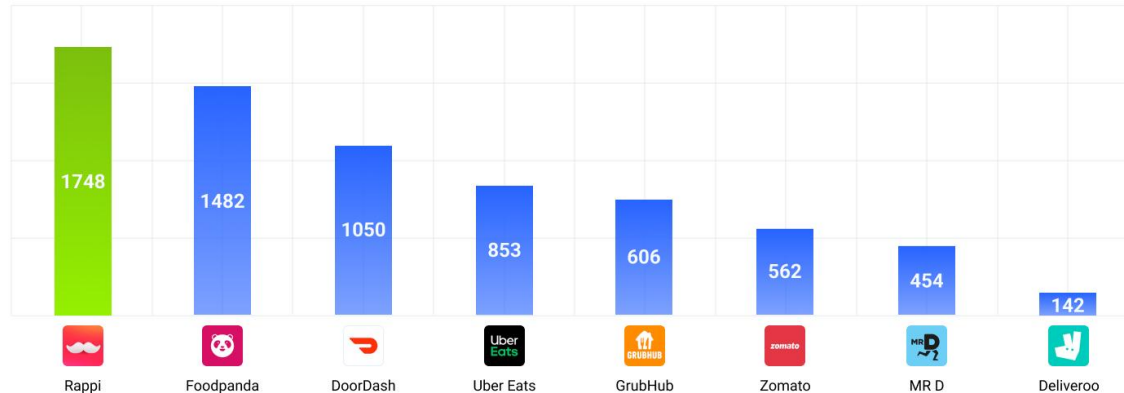


3. Product Iteration Velocity

Over **8,000 Product Updates** in Just 6 Months!

Frenetic pace of innovation, with a very high velocity to add new features, flows & pages, UX copy and frequent UI/UX changes.

Product Updates



Colombia's **Rappi** and Singapore's **Foodpanda** lead the pack with around 2000 product updates tracked on each app over the past 6 months.



UK's **Deliveroo** is the only app from the ones analyzed with fewer than 100 product updates over the last 6 months.

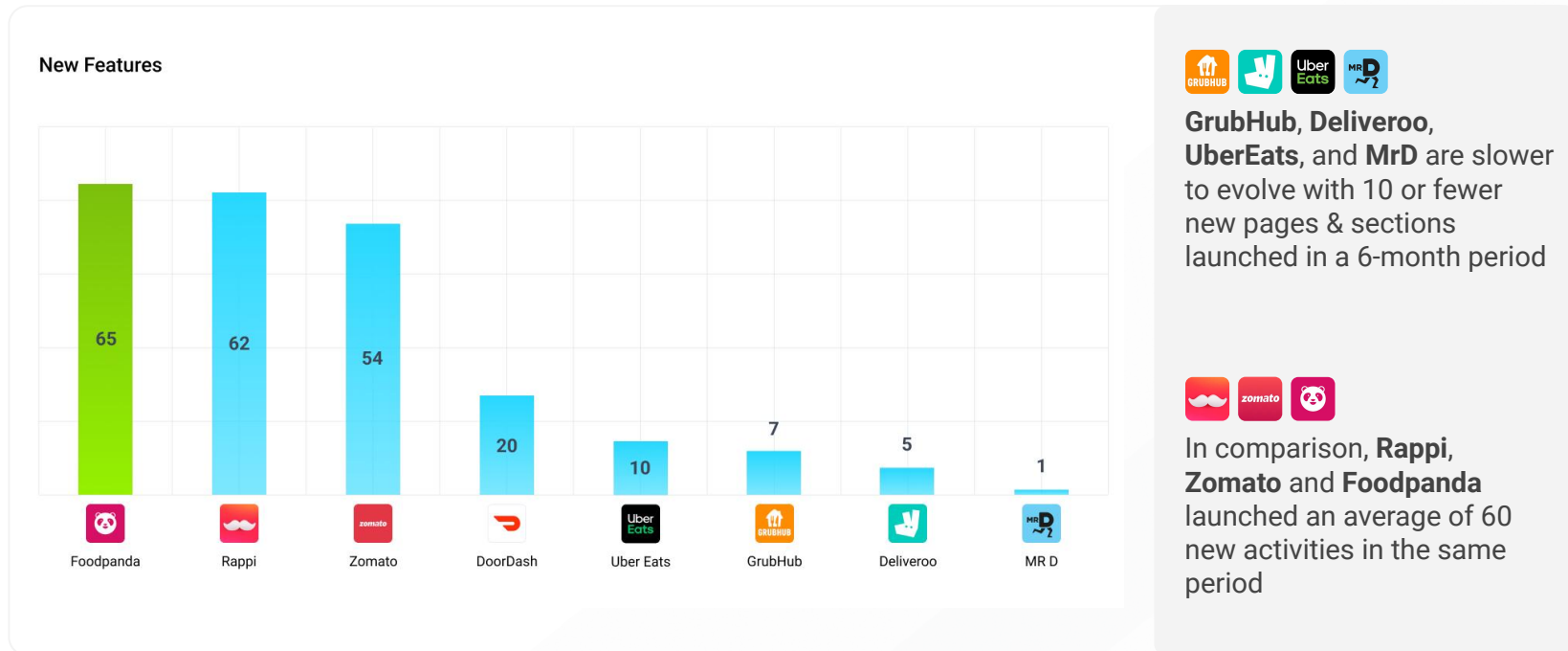




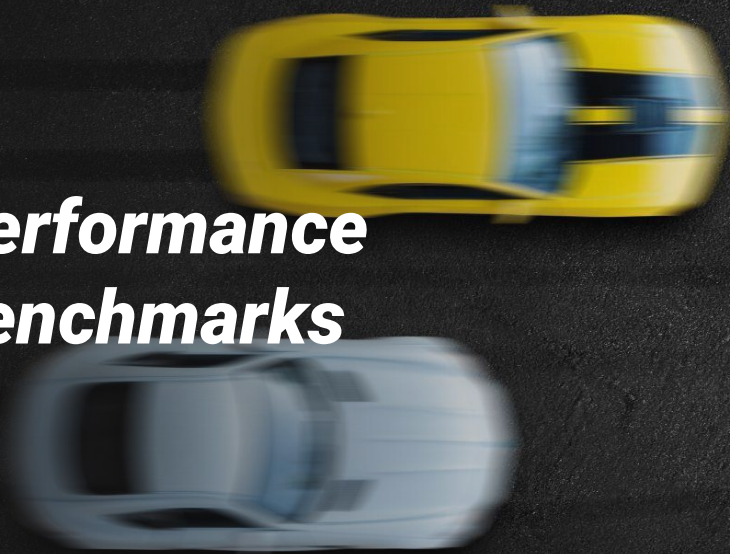
**4. Volume of
New Feature Launches**

4. Volume of New Feature Launches

Enormous differences in the **volume of new user flows and sections launched** across the apps analyzed



■ 5. App Performance Speed Benchmarks

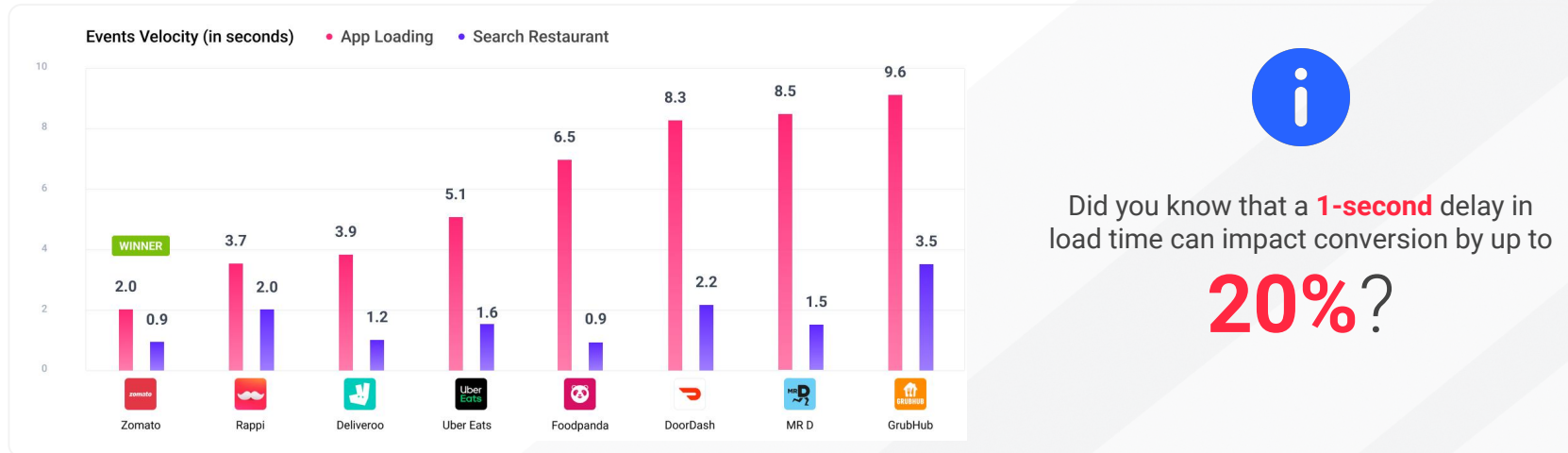


5. App Performance Speed Benchmarks

Every Millisecond Counts

In-app speed has a direct impact on conversion. Slow performance across the user journey can turn away potential customers faster than a blink of an eye.

Investing on these key performance metrics can make or break the future of an app in this hyper-competitive space.



6. Features across the Competitive Landscape












DOORDASH

6. Features across the Competitive Landscape


Customer expectations are higher than ever before.

Missing key features can and will turn customers away.

Feature	 DoorDash US	 Uber Eats US	 Foodpanda SG	 Deliveroo UK	 Grubhub US	 Rappi BR	 Zomato IND	 Mr D SA
Proprietary Payment Method	⊘	⊘	●	⊘	⊘	●	⊘	⊘
Share Dish	●	●	⊘	⊘	⊘	●	⊘	⊘
"Schedule for Later" on Restaurants	●	●	●	●	●	●	⊘	●
Groceries	●	●	●	●	●	●	●	●
Group Order	●	●	●	●	●	⊘	⊘	⊘
Send Order as a Gift	●	●	⊘	⊘	⊘	⊘	●	●
Save Store	●	●	●	●	⊘	⊘	●	⊘
Gift Cards as Payment Method	●	●	●	●	●	●	●	●
Free Trial Period of Loyalty Program	30 Days	30 Days	⊘	14 Days	30 Days	30 Days	⊘	⊘
Dining Out Special Offers	⊘	⊘	●	⊘	⊘	⊘	●	⊘
Donations	⊘	⊘	⊘	●	●	⊘	●	⊘



Why is **GrubHub** the only US player not offering the ability to share a dish, send a gift, or save a store in your favorites?



Is **Zomato** lagging behind by not offering features that have become industry standard such as group orders or "schedule for later"?

7. Conclusion

7. Conclusion

For an industry moving at an unprecedented pace, **understanding the speed at which key players or competitors are evolving and expanding their offering is key.**

From the speed of the release cycles, which average a new app version release weekly, to the agility in which product teams are able to produce new app pages and sections - the success to capture market share in this hyper-competitive landscape will rely heavily on the skills and capabilities of the teams behind the platforms.

With most features becoming commodities in the eyes of customers, offering the full suite of key features is essential. As competition becomes more fierce, food delivery apps will have to become increasingly sophisticated to create a seamless user experience - fast, intuitive, and convenient. Subtle elements such as pages that are slow to load or a button that can't be found instinctively can become huge differentiating features in the eyes of customers.

While some established players might have been able to rely on the reputation of their brand or a loyal customer base, **the agility and speed of innovation from new players from around the world is a threat to be reckoned with.**



8. Supplemental

Several strategic insights Watchful has shared with Food & Delivery customers in the last month



8. Supplemental

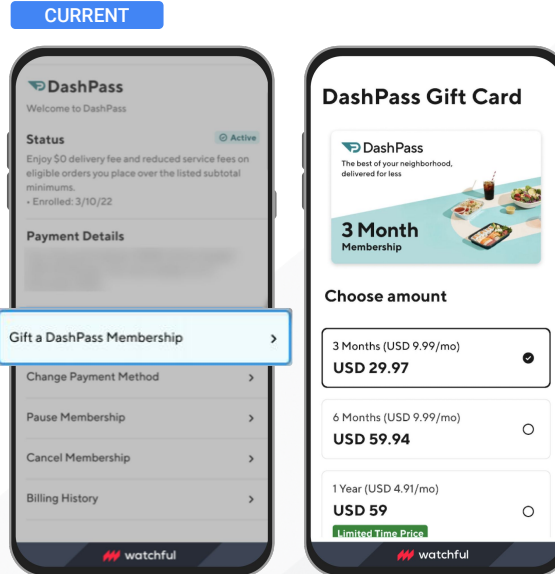
Social gifting as a way to **drive Membership**



NEW FEATURE | DEC 7TH

New 'DashPass Membership' Gift Option

Doordash has added a new 'DashPass Membership' gift option, which enables users to purchase a 'DashPass' membership for a specific period of time and offer it as a gift card to other users.



8. Supplemental

Giving the taste of premium service from Day 1



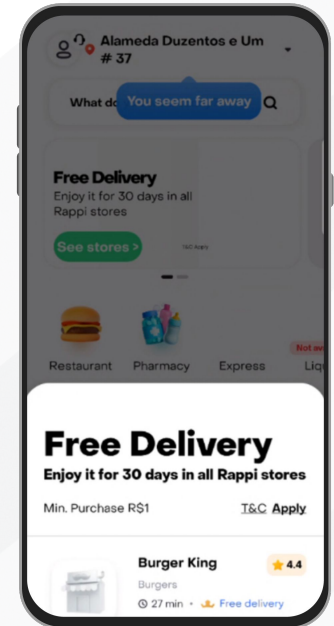
EXPERIMENT | DEC 29TH

Free Delivery Promotion added on the Onboarding flow

Rappi has added a 'pop up' in their onboarding flow offering a 30 days free delivery trial.

This approach enables new users to test Rappi's premium subscription right in their beginning of relationship, increasing the chance of conversion.

NEW VERSION



8. Supplemental

Experiencing the app **from a new angle**

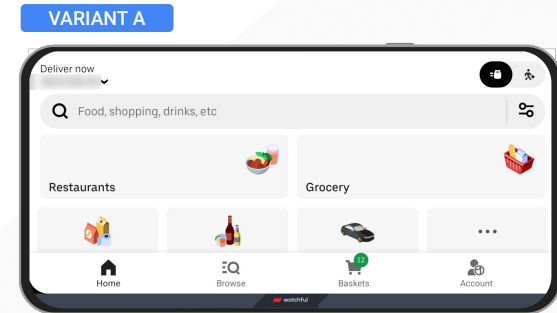
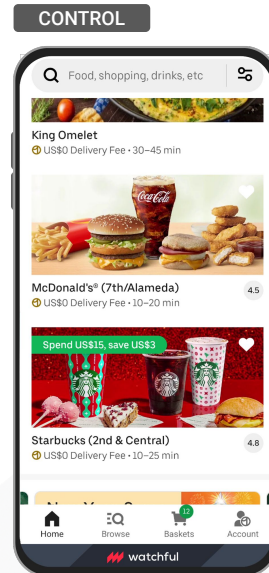


EXPERIMENT | DEC 10TH

Testing Landscape Mode

Uber Eats is testing a new landscape mode. Users will be able to rotate their phones and navigate through the app in landscape mode.

This new way of navigating through the app might be the basis for creating new features, such as advertising videos on the platform.



8. Supplemental

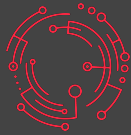
Want to **dive deeper** into some of the insights from the report?

Get in touch! We'd love to share more information about the apps that you care about and help you to benchmark against them.



Who is **Watchful**

Leaders in **Strategy, Product, Marketing** and **Engineering** at **Fortune 500 companies** rely on Watchful to create better products by giving them insights on their competitors. Watchful provides unprecedented insights into what your competitors are testing, offers benchmarking against user flows in customer's journeys and visualization into marketing efforts with data unavailable with any other provider in the market.



Our Technology

Our automated competitive research enables companies to understand what their competitors are testing, building and marketing. Utilizing a mix of differential analysis, global device farms, computer vision and Machine Learning, along with a team of analysts we've built a technology suite that recognizes new changes in apps and updates our clients with changes at the speed of innovation.



Consultative Approach

Our team works closely with you to understand the competitors that you are looking to track, analyzes changes as they happen and partner directly with you to provide the insights that are most meaningful to your business. As a result, **Watchful.ai** insights are frequently cited in earnings calls, board decks and product strategy decision making meetings for our **Fortune 500 clients**.

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