



# Food Delivery oCX Report

Spring 2024





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# About This Report

## **Food Delivery: a tough market for growth**

During the early stages of the coronavirus pandemic, many Americans turned to food, grocery, and meal kit delivery services, causing a surge in demand. However, as the pandemic subsided, the industry struggled to maintain this momentum. According to Bloomberg Second Measure, major meal delivery services saw a sales growth of 162 percent year-over-year in 2020, but by March 2024, the growth had slowed to just 8 percent.

In their Q1 earnings releases, industry giants like DoorDash, HelloFresh, and Uber Eats conveyed a similar message: they are exploring new ways to sustain growth. These strategies include launching subscription models, enhancing product offerings, and forming partnerships with major chain restaurants like McDonald's and Domino's. Some companies have even acquired competitors.

Despite these efforts, customer retention remains challenging as loyalty dwindles. The rise of exclusive delivery partnerships and incentives like memberships and discounts has prompted diners to switch between apps to access their preferred takeout options and secure the best deals.

Regardless of their growth mode, understanding customer needs is crucial for food delivery companies. Effective growth and retention strategies hinge on leveraging customer feedback through various channels - such as review sites, NPS surveys, support desk tickets, chats, apps, and social media- and transforming into insights and actions - faster than competitors.

Our latest report looks into the industry by analyzing customer feedback from app reviews, a critical touchpoint in the customer's purchase journey. Focusing on the U.S. and Canada, this spring edition examines over 80 brands across food, grocery, meal kit, and beverage subcategories. The report provides a snapshot of industry-wide customer feedback and updates our leaderboards, which rank the most customer-centric brands based on app reviews.



# Methodology

We conducted a comprehensive analysis of customer reviews for 75 food delivery apps operating in the United States and Canada from Google Play Store and the App Store. We then ranked the brands based on oCX our proprietary customer experience quality metric.

## What is oCX Score?

oCX score is our AI-generated metric that describes the quality of a company's customer experience, based on unstructured data including reviews, surveys, social media posts and support tickets.

## How is oCX calculated?

We use our proprietary AI to assign a score ranging from 0 to 10 to each customer feedback, then roll up the individual scores to brand aggregated level.

## Scope

Food delivery apps that are both pure online delivery services as well as apps of brick and mortar companies with delivery are included

We categorized the apps into four groups:

- Food Delivery
- Grocery Delivery
- Meal Kit Delivery
- Alcohol/Beverage Delivery

We used the most recent 4500+ reviews for each app based on availability.

Apps with fewer than 500 reviews were excluded from our analysis to ensure statistical significance.

Sample Reviews	oCX Score
<i>Easy to use app, I've already made several purchases lol I love it</i>	10
<i>Sometimes services and products are good but sometimes not so good.</i>	7
<i>Your services are ugly. You don't investigate your sellers.</i>	1

# Key Findings

The top 3 experiences shared by consumers in their reviews were related to App Usability, Service Quality and Product Quality observed in **66%** of the reviews.

The top brands on our leaderboard received **117% more positive reviews in App Usability** and **90% more positive feedback on Service Quality** compared to the rest of the brands.

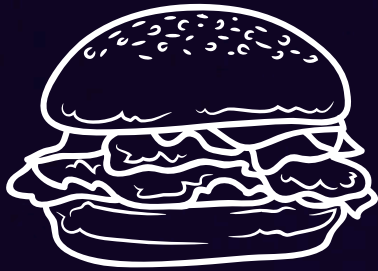
**Meal kit delivery** apps received the **highest** percentage of positive reviews (55%) among the four subcategories of delivery services.

Conversely, **food delivery** apps received the **lowest** percentage of positive reviews, totaling only **42%**.



**Variety of payment options** emerged as the only user request to rank in the top 5 across all delivery categories

## Top Requests from Users



**Food Delivery:** The top requests from users in the food delivery category include **enhancement of rewards (25%)**, **variety of payment options (19%)**, and **customization of meals (12%)**.

**Meal Kit Delivery:** Users emphasized meal customization **(36%)** and delivery options **(19%)** as their primary requests within the Meal Kit delivery category.

**Grocery Delivery:** Users predominantly looked out for improvements in **app usability (35%)**, **delivery options (25%)** and better notification systems.

**Beverage/Alcohol Delivery:** Users predominantly looked out for improvements in **app usability (35%)**, **delivery options (25%)** and better notification systems.



## Leaderboard Changes

- Beyond Menu (BM) and Thrive Market maintained their positions as the top food delivery apps for the second consecutive term
- Uber Eats experienced a significant decline, plummeting from 7th to 40th position. Read on below for several observed reasons.
- Instacart also experienced a notable drop, falling from 9th to 27th place.
- New entries to our top 10 list included renowned brands such as Starbucks, Jersey Mike's, and Domino's.

### Why did Uber Eats fall dramatically in our leaderboard?

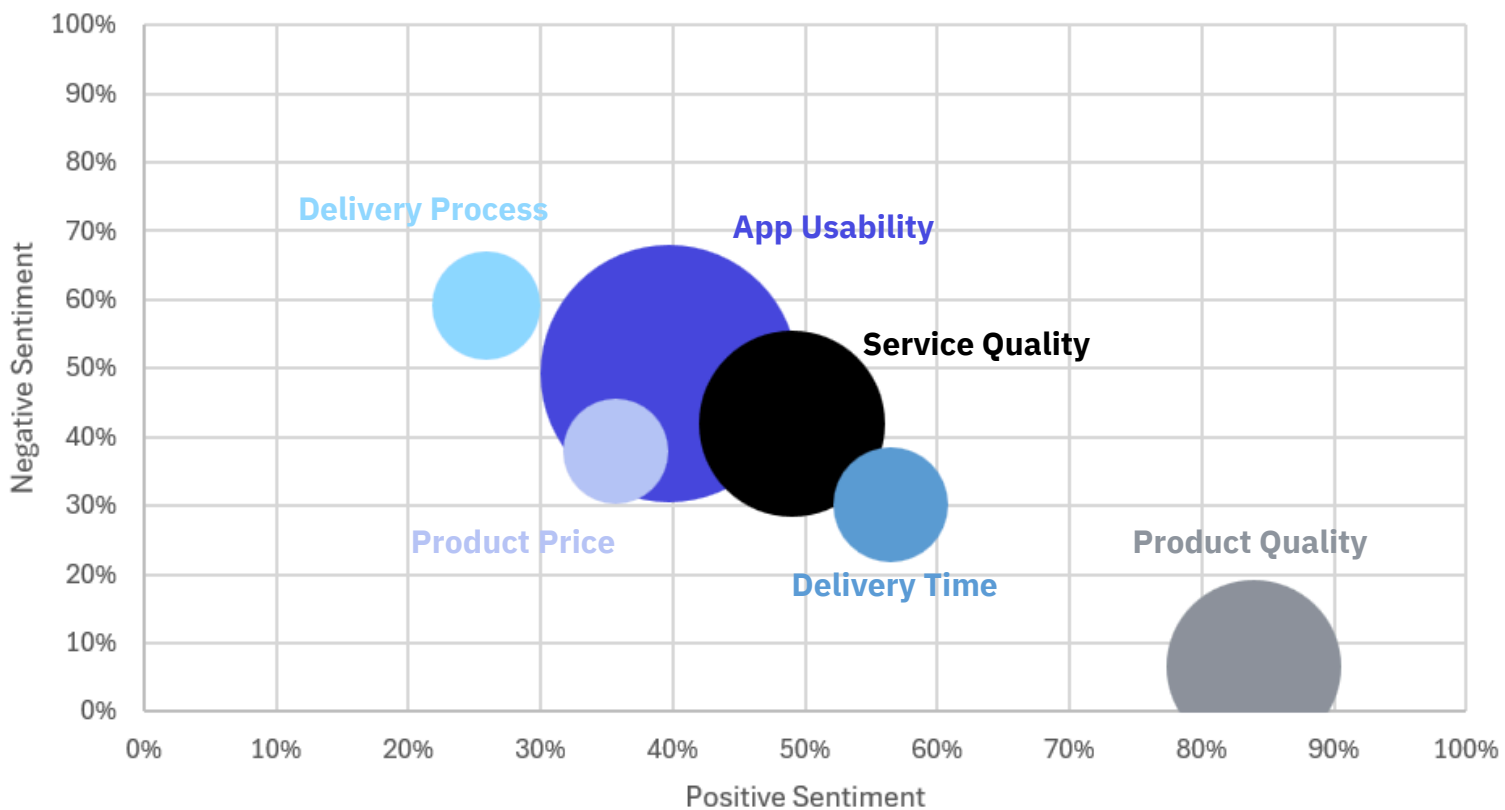
Uber Eats fell from the top 10 primarily due to a surge in negative reviews, driven largely by customer discontent with delivery experiences. Specifically, concerns about deliveries to wrong addresses, delays, and instances of drivers mishandling or failing to deliver food became increasingly prevalent. Notably, in our initial report, driver-related complaints constituted only **6%** of all reviews, whereas in the recent report, this figure surged to over **11%**.



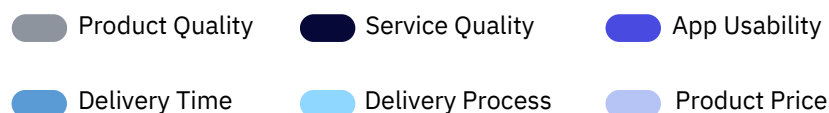
# Top Customer Issues

The top three experiences—App usability, Service quality, and Product quality—comprised 66% of all reviews, as indicated by their significant bubble sizes. It is worth noting that “**delivery process**” reviews have the most negative sentiment (59%) across all categories.

Figure 1. Top Customer Issues - Global View



(\*): Bubble size indicates number of reviews classified by our text analytics models







# Tone of Customer Issues: Subcategory Comparison

App Usability, Service Quality, and Product Quality occupy the top three spots as the most reviewed topics across all four categories. Together, these three categories constitute a substantial portion of reviews: 64% in Food Delivery, 65% in Grocery Delivery, 67% in Meal Kit Delivery, and 74% in Alcohol/Beverage Delivery.

Subcategories	Top 5 Customer Issues	Sentiment Distribution		
		Negative	Neutral	Positive
<b>Food Delivery</b>	App Usability ( <b>33%</b> )	52%		37%
	Service Quality ( <b>18%</b> )	48%		43%
	Product Quality ( <b>13%</b> )	7%		84%
	Delivery Time ( <b>6%</b> )	34%		52%
	Delivery Process ( <b>6%</b> )	63%		22%
<b>Grocery Delivery</b>	App Usability ( <b>33%</b> )	44%		45%
	Service Quality ( <b>19%</b> )	30%		61%
	Product Quality ( <b>13%</b> )	5%		88%
	Delivery Time ( <b>8%</b> )	22%		66%
	Product Price ( <b>7%</b> )	32%		46%
<b>Meal Kit Delivery</b>	Product Quality ( <b>35%</b> )	10%		76%
	App Usability ( <b>23%</b> )	48%		39%
	Service Quality ( <b>9%</b> )	51%		36%
	Product Price ( <b>8%</b> )	20%		55%
	Delivery Time ( <b>5%</b> )	43%		40%
<b>Alcohol/Beverage Delivery</b>	App Usability ( <b>45%</b> )	42%		46%
	Product Quality ( <b>15%</b> )	6%		85%
	Service Quality ( <b>14%</b> )	23%		70%
	Delivery Time ( <b>6%</b> )	18%		70%
	Product Price ( <b>5%</b> )	25%		55%

Table 2: Tone of Customer Issues: Subcategory Comparison



# Subcategory Analysis

## Food Delivery:

In food delivery apps, customer reviews indicate that App Usability (33%) and Service Quality (18%) are the most frequently discussed topics, with a predominance of negative feedback in both areas. Conversely, Product Quality garners overwhelmingly positive reviews, with 84% positive feedback compared to just 7% negative.

Delivery Process emerges as a notable concern specific to food delivery, ranking as the fourth most reviewed topic. It's noteworthy that for food delivery apps, while 53% of reviews regarding delivery time are positive, the majority of reviews, approximately 63%, concerning the delivery process itself are negative. This observation underscores a disparity in sentiment when considering both aspects of the delivery experience.

## Top Feature Requests

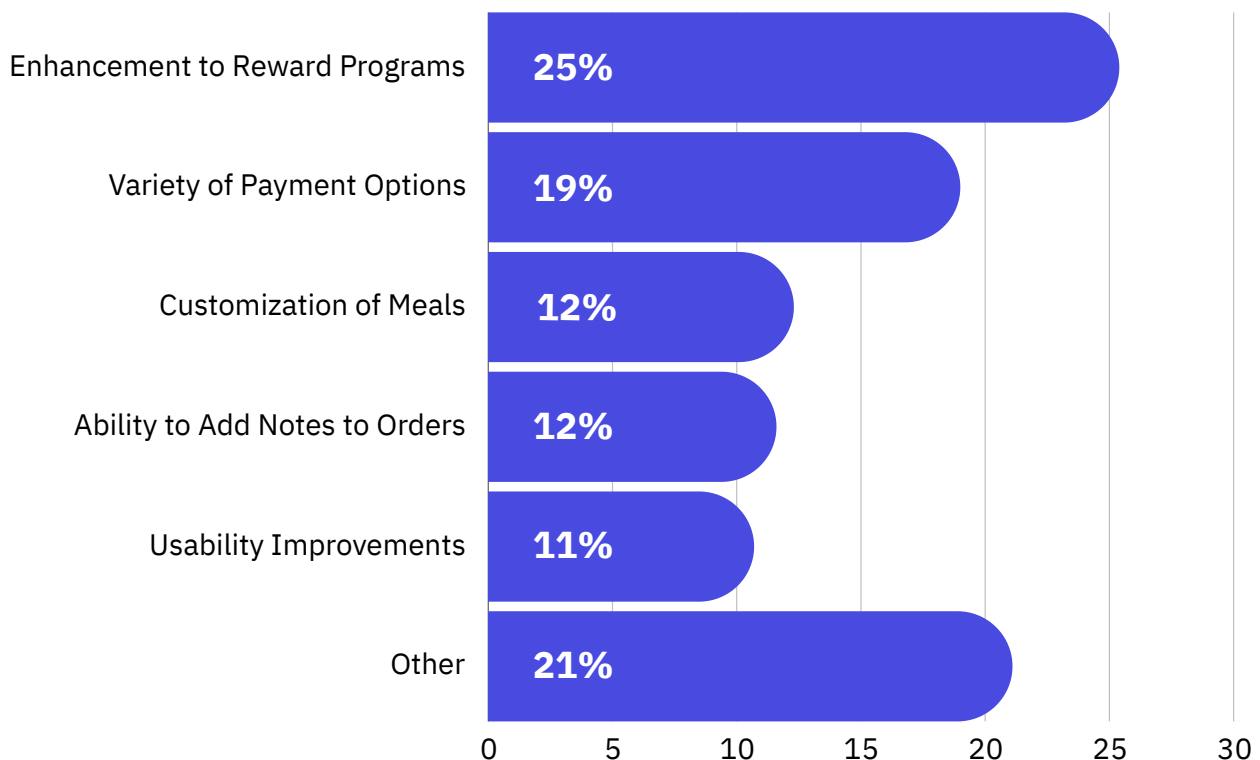


Figure 2. Top Feature Requests - Food Delivery



## Grocery Delivery:

In grocery delivery apps, App Usability and Service Quality continue to dominate as the most reviewed topics. Unlike food delivery apps, however, the majority of Service Quality reviews received by grocery delivery apps are positive, with a substantial 60% expressing satisfaction. This contrasts sharply with the service quality reviews of food delivery apps, which received 48% negative and 43% positive feedback.

Similar to food delivery apps, grocery delivery apps also receive overwhelmingly positive feedback for Product Quality, with an impressive 88% of reviews expressing satisfaction.

Interestingly, unlike food delivery apps, grocery delivery apps find Product Price among the top five most reviewed topics instead of Delivery Process. However, they received more negative reviews in this area compared to meal kit delivery apps and alcohol/beverage apps.

## Top Feature Requests

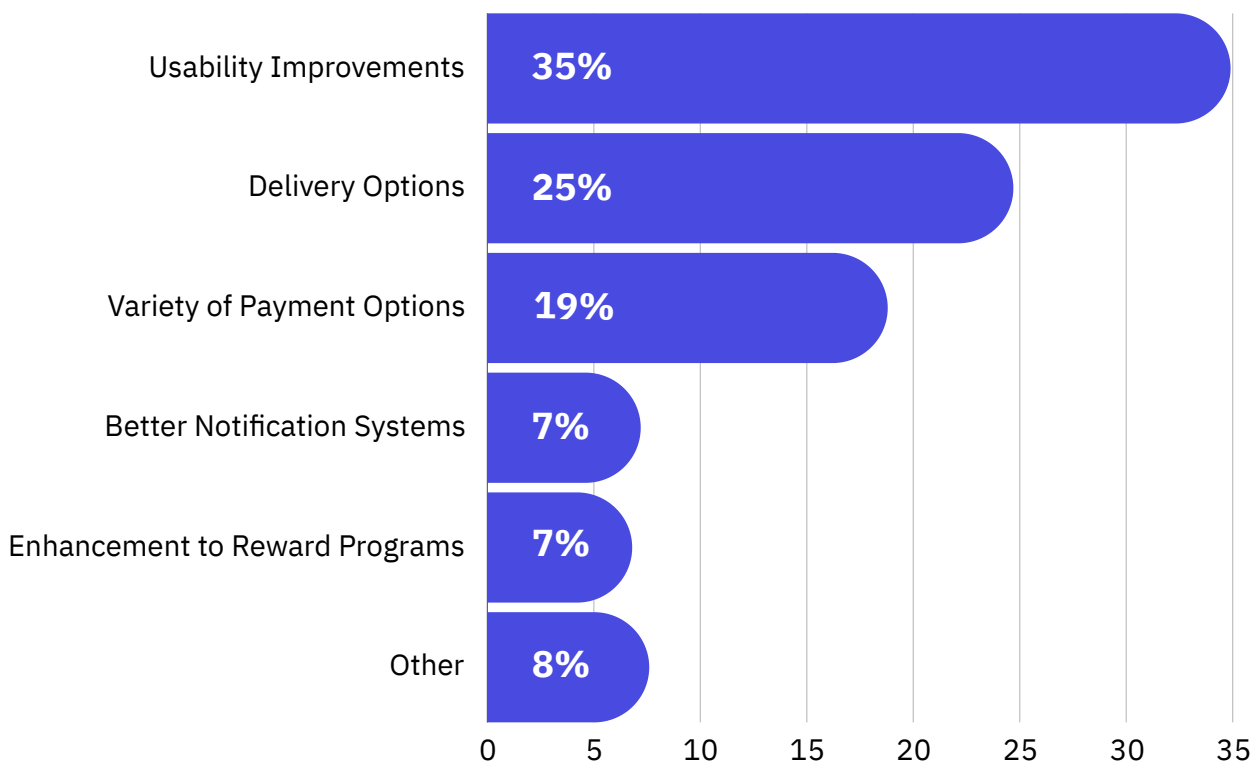


Figure 3. Top Feature Requests - Grocery Delivery



## Meal Kit Delivery:

Among all subcategories, meal kit delivery apps stand out as the only one where App Usability isn't the most discussed topic. Instead, Product Quality takes the spotlight, comprising 35% of the total reviews, while App Usability accounts for 23%.

Despite the overall positive sentiment towards Product Quality, meal kit delivery apps receive more negative than positive reviews in App Usability, Service Quality, and Delivery Time.

While they boast a respectable 76% positive rating in Product Quality, meal kit delivery apps lag behind other subcategories in this aspect (Food Delivery 84%, Grocery Delivery 88%, and Alcohol/Beverage Delivery 85%).

## Top Feature Requests

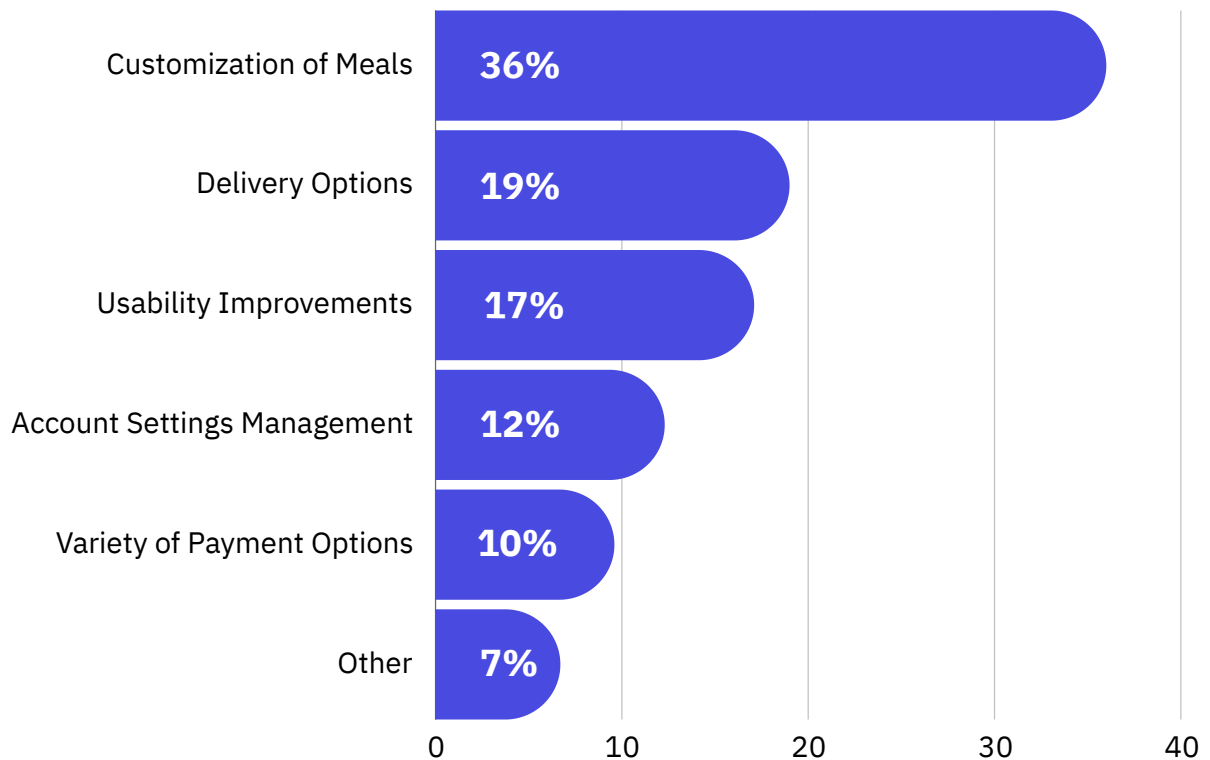


Figure 4. Top Feature Requests - Meal Kit Delivery



## Alcohol/Beverage Delivery:

In contrast to other subcategories, Alcohol/Beverage apps stand out as the only ones where App Usability garners more positive than negative reviews, with a ratio of 46% positive to 42% negative.

Furthermore, Alcohol/Beverage delivery is unique in receiving more positive than negative reviews across each of the five most reviewed topics.

Remarkably, App Usability, Product Quality, and Service Quality collectively account for 74% of reviews for alcohol/beverage delivery apps, with App Usability alone capturing 45% of the total reviews.

## Top Feature Requests

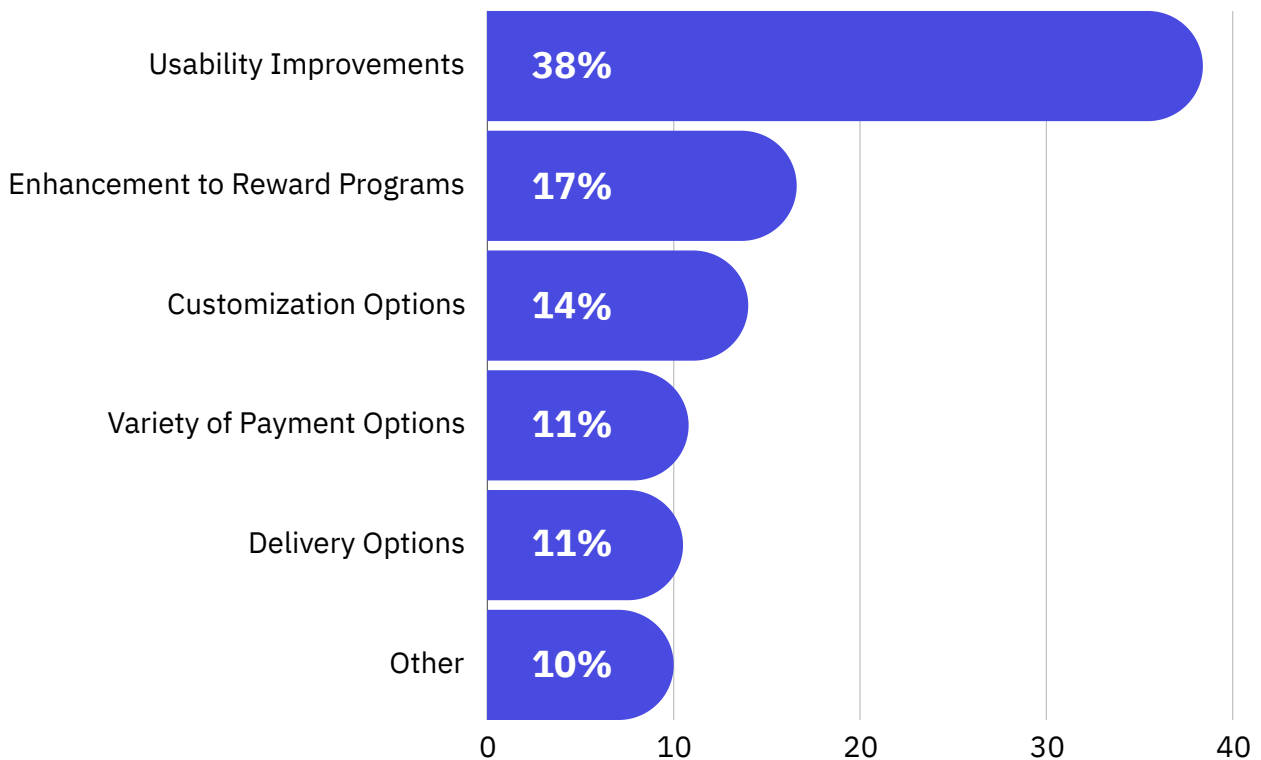


Figure 5. Top Feature Requests - Alcohol/Beverage Delivery



# oCX Leaderboards



# Top 10

Ranking	Mobile application	oCX	Segment
1		69	Grocery
2		68	Food
3		53	Alcohol
4		52	Food
5		47	Food
6		47	Alcohol
7		44	Beverage
8		41	Meal Kit
9		39	Food
10		35	Food

Table 3. oCX Performance: Top 10 General

Thrive Market, a grocery delivery app, claims the top position on our oCX Leaderboard. Following closely in second place is Beyond Menu, a prominent name in the food delivery landscape while Total Wine, an alcohol delivery app secures the third spot.



# Top 11-50

Ranking	Mobile Application	Subcategory	oCX	Change Since 1st Report
11	Publix Delivery	Grocery	34	-5
12	Slice	Food	33	New
13	EveryPlate	Meal Kit	32	New
14	EatStreet	Food	31	New
15	Green Chef	Meal Kit	30	New
16	Toast Takeout	Food	27	+24
17	Blue Apron	Meal Kit	27	New
18	Dunkin'	Alcohol/Beverage	25	New
19	Ritual	Food	24	New
20	Checkers & Rally's	Food	22	New
21	Dave's Hot Chicken	Food	21	New
22	Yelloh	Food	21	New
23	HelloFresh	Meal Kit	20	-11
24	Chef's Plate	Meal Kit	20	-5
25	Shipt	Grocery	19	New
26	Blaze Pizza	Food	17	New
27	Instacart	Grocery	13	-18
28	Raising Cane's Chicken Fingers	Food	12	New
29	Postmates	Food	12	New
30	Gopuff	Grocery	11	-7
31	Burger King	Food	11	New
32	Papa John's	Food	10	New
33	Seamless	Food	9	-6
34	Weee Asian Grocery Delivery	Grocery	6	New
35	Popeyes	Food	6	New
36	Tavour	Alcohol/Beverage	6	New
37	7Now	Food	4	-12
38	IHOP	Food	2	New
39	Sunbasket	Meal Kit	2	New
40	Uber Eats	Food	0	-22
41	Casey's	Food	-1	New
42	McDonald's	Food	-2	New
43	Dairy Queen	Alcohol/Beverage	-3	New
44	DoorDash	Food	-4	-15
45	Dinnerly	Food	-5	New
46	Home Chef	Meal Kit	-6	New
47	Arby's	Food	-7	New
48	Goldbelly	Meal Kit	-8	New
49	Wegmans	Grocery	-9	New
50	PC Express	Grocery	-9	New

Table 4. oCX Performance: Top 11-50 General





# Food Delivery Apps Leaderboard

Ranking	Mobile application	oCX
1	 beyond menu	68
2		52
3		47
4		39
5		35
6		33
7		31
8		27
9		24
10		22

Table 5. oCX Performance: Top 10 Food Delivery Brands

In our oCX leaderboard for top food delivery apps, Beyond Menu retains its first-place position, as observed in the previous report. Following in second place is Jersey Mike's Subs, with Domino's securing the third spot behind them.



# Food Delivery Apps 11-45

Ranking	Mobile Application	oCX
11	Daves Hot Chicken	21
12	Yelloh	21
13	Blaze Pizza	17
14	Raising Canes Chicken Fingers	12
15	Postmates	12
16	Burger King	11
17	Papa John's	10
18	Seamless	9
19	Popeyes	6
20	7NOW Food and Alcohol Delivery	4
21	IHOP	2
22	Uber Eats	0
23	Casey's	-1
24	McDonald's	-2
25	DoorDash	-4
26	Arby's	-7
27	Whataburger	-12
28	Favor Local Delivery Service	-12
29	Firehouse Subs	-12
30	Chipotle	-14
31	SkipTheDishes	-17
32	CAVA	-18
33	Grubhub	-20
34	Fantuan	-23
35	Little Caesars	-26
36	ChowNow	-28
37	Chowbus	-37
38	KFC	-38
39	Subway	-47
40	Wendy's	-50
41	Zaxby's	-61
42	Taco Bell	-63
43	Panera Bread	-74
44	Buffalo Wild Wings	-74
45	Jack in the Box	-83

Table 6. oCX Performance: Top 11-45 Food Delivery Brands



# Grocery Delivery Apps

Ranking	Mobile application	oCX
1		69
2		34
3		19
4		13
5		11
6		6
7		-9
8		-9
9		-16

Table 7. oCX Performance: Top Grocery Delivery Apps

In our oCX leaderboard for the best grocery delivery apps, Thrive Market continues to hold its first-place position from the previous report, with a notable lead over the competition. Publix trails behind in second place, with Shipt securing the third position further down the rankings.



# Meal Kit Delivery Apps


Ranking	Mobile application	oCX
1	<b>F A C T O R _</b>	41
2	<b>EveryPlate</b>	32
3	<b>Greenchef</b> <sup>®</sup>	30
4	 <b>Blue Apron</b>	27
5	 <b>HELLO FRESH</b>	20
6	<b>Chefs Plate</b>	20
7	<b>sunbasket</b> <sup>®</sup>	2
8	<b>DINNERLY</b>	-5
9	 <b>HOME CHEF</b>	-6
10	<b>GOLD BELLY</b>	-8
11	<b>martha stewart</b> & <b>MARLEY SPOON</b>	-14
12	<b>snack</b>  <b>kitchen</b>	-26

**Factor\_**, takes the lead in our first ever Meal Kit Delivery oCX leaderboard.

**Table 8. oCX Performance: Top Meal Kit Delivery Apps**



# Alcohol & Beverage Apps

Ranking	Mobile application	oCX
1		53
2		47
3		44
4		40
5		25
6		6
7		-27
8		-51

*As of March 28th, 2024, Drizly ceased operations and has since been integrated into the Uber Eats platform. The data presented here is derived from app reviews collected up until March, reflecting insights from users during Drizly's operational period.*

**Total Wine claims the top spot in our Alcohol/Beverage leaderboard, with Vivino closely trailing behind in second place. Starbucks secures the third position in the rankings.**

**Table 9. oCX Performance: Top Alcohol/Beverage Apps**



# Comparison of Rankings for Apps Featured in Both Reports

In our previous report, we surveyed the global landscape of successful food delivery apps. In this analysis, we concentrated on North American contenders, examining their current rankings relative to each other. Here is a quick summary of movements in our rankings:

- Thrive Market ascended to the 1st position, overtaking Beyond Menu which now holds the 2nd rank
- Vivino moved down two spots to 6th, while Publix slid down five place to 11th.
- Instacart fell from 5th to 27th and Uber Eats dropped significantly from 7th to 40th.
- Doordash and Grubhub experienced huge drops, moving to 32nd and 58th, respectively.
- Toast Takeout managed to stay 16th despite the addition of many more US-based apps to the report.
- SkipTheDishes dropped significantly, moving from 17th to 57th.

Finally, Drizly, which would have ranked 9th based on performance metrics, was removed from the leaderboard due to ceasing operations on March 28th. based on performance metrics, was removed from the leaderboard due to ceasing operations on March 28th.





# Comparison of Rankings for Apps Featured in Both Reports

Previous Ranking	Current Ranking	Mobile Application	oCX
2	1	Thrive Market	69
1	2	Beyond Menu	68
4	6	Vivino	47
3	11	Publix	34
16	16	Toast Takeout	27
8	24	Chef's Plate	20
13	25	Shipt	19
5	27	Instacart	13
9	29	Postmates	12
10	30	Gopuff	11
15	33	Seamless	9
11	37	7NOW	4
7	40	Uber Eats	0
12	44	Doordash	-4
18	52	Favor	-12
17	57	SkipTheDishes	-17
14	58	Grubhub	-20
6	-	Drizly	40

**Table 10. Comparison of Previous and Current Rankings for Apps Featured in Both Reports**



# Food Delivery Apps: What sets leaders apart from the rest?

The food delivery apps with the highest oCX scores are Beyond Menu, Jersey Mike's and Domino's. The average oCX (Observational Customer Experience score) for this trio stands at an impressive **56**. In contrast, the average score for the remaining food delivery apps is **-9**. What accounts for this discrepancy? Let's delve into the specific topics that users have reviewed.

**The top five most reviewed topics** for food delivery apps are: App Usability, Service Quality, Product Quality, Delivery Process and Delivery Time. The top contenders outperform the industry average across all of these topics:

- App usability is the primary customer experience topic appearing in one-third of customer reviews. **Leading food delivery apps received 117% more positive usability reviews** than the average food delivery app.
- Service quality is the second most discussed topic, mentioned in about 18% of all conversations, with **leading food delivery apps receiving about 90% more positive reviews** than the rest of the food delivery apps.
- The gap between leading apps and others is smallest in the product quality, indicating general user satisfaction with the capabilities of food delivery apps.
- Delivery process appears to be a significant pain point. Leading food delivery apps have 40% negative reviews concerning delivery process, compared to 64% for the average food delivery app.

Below, you'll find a table detailing the data above received by both the top contenders and the remaining food delivery apps for customer themes.





# Food Delivery Apps: What sets leaders apart from the rest?

Key Topics (% of reviews)	Leaders	Rest of the Food Delivery Apps
App Usability ( <b>33%</b> )	<b>75%</b> <b>17%</b>	<b>34%</b> <b>55%</b>
Service Quality ( <b>18%</b> )	<b>81%</b> <b>13%</b>	<b>43%</b> <b>48%</b>
Product Quality ( <b>13%</b> )	<b>93%</b> <b>2%</b>	<b>84%</b> <b>7%</b>
Delivery Process ( <b>6%</b> )	<b>42%</b> <b>40%</b>	<b>22%</b> <b>64%</b>
Delivery Time ( <b>6%</b> )	<b>87%</b> <b>7%</b>	<b>51%</b> <b>34%</b>



**Positive Reviews**



**Negative Reviews**



# Conclusion

In this analysis, we explored the competitive world of online food delivery applications. Our aim was to offer a detailed overview of the consumer experience within this vibrant industry, examining predominant customer concerns, and pinpointing the leading contenders as determined by customer reviews.

We aspire for industry professionals to commit themselves to deeply comprehend their customers' perspectives. By meticulously examining customer input gathered from diverse channels—such as reviews, surveys, and social media posts—they have the opportunity to persistently refine their offerings, services, and communication methods. Remember, customer experience is not a one-time event; it's an ongoing process.

## About Alterna CX

Recently, Alterna CX, a trailblazer in AI-driven customer experience solutions recognized by industry leaders like Gartner and Forrester, introduced the Observational Customer Experience Score (oCX). Departing from traditional survey-based metrics, oCX employs text analysis to delve into customer sentiments and emotions, providing a nuanced and authentic reflection of customer experience quality. Recognized by leading brands like Ford, BNP Paribas, MediaMarkt, Carrefour and Ayoba is committed to analyzing and enhancing customer experiences daily.

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