



FIELD NOTES

**FOOD DELIVERY BRANDS
HEAD-TO-HEAD**

MBLM

THE ORDERING OPERATION

Market context:

The UAE has a well-established tradition of getting everything delivered to your doorstep or to your car at the curb. So in some ways, the explosion of food delivery brands seems almost natural.

But with Foodora's recent exit from the UAE, the acquisition of Talabat by Rocket Internet, and the acquisition of Foodonclick and 24h by FoodPanda, it seemed the time was ripe to put the food delivery brands to the test.

Our challenge:

We compared six food delivery brands in Dubai to find the most rewarding, hassle-free ordering experience.

Our approach:






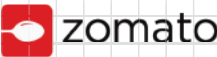
To evaluate the complete customer experience, we created a thorough checklist covering every facet of the service – from signing up, creating accounts, and setting up delivery addresses to testing the mobile functionality.

As a control sample, we first ordered from the same restaurant (Maple Leaf, an office favorite) using all six services to get a taste for how each brand handled the same order. Then we repeated the exercise, this time ordering from different restaurants to assess the ease of discovering new places and customizing orders. To control for other variables, we placed all our orders on weekdays at 1pm.

THE JUDGING PANEL



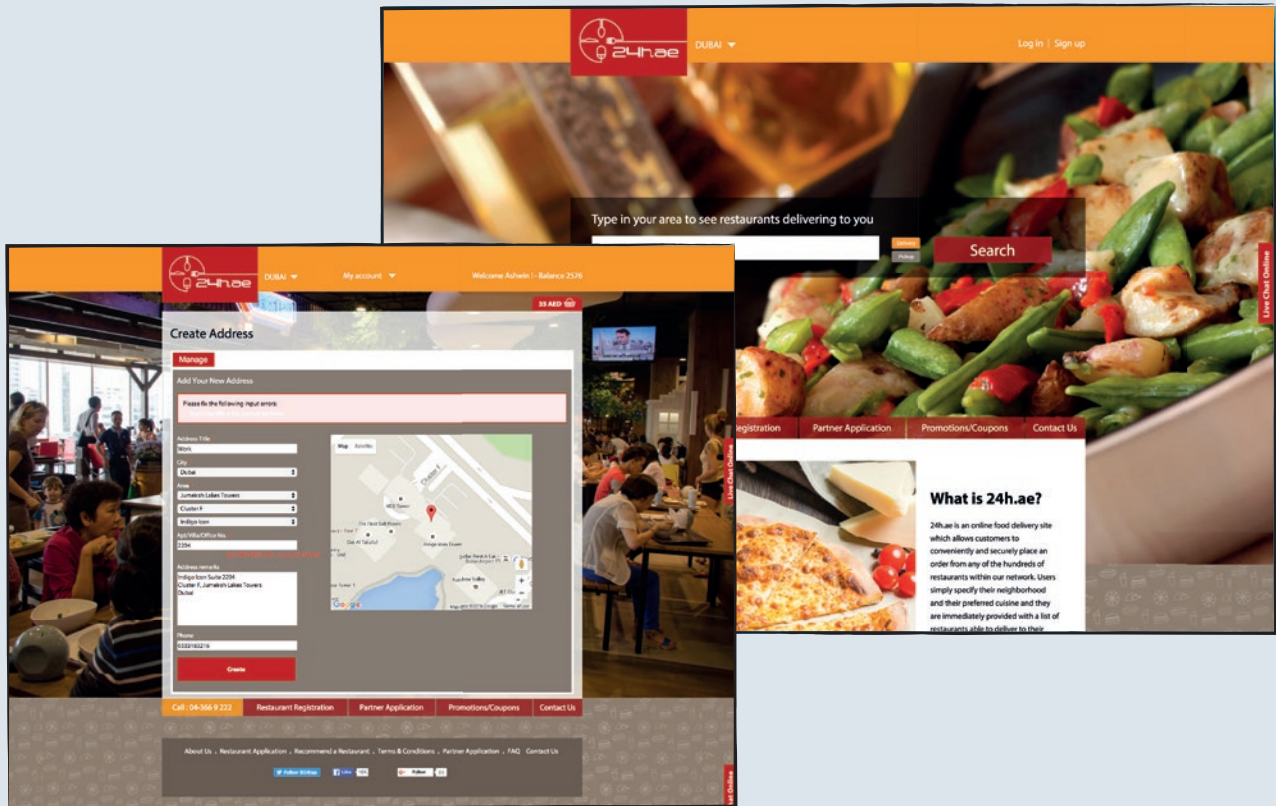
THE COMPETITIVE SET

	UAE LAUNCH	OTHER MARKETS SERVED
	2011	Middle East, Europe
	2015	12 countries, including Hong Kong, the UK, Germany
	2011	UAE only
	2010	Turkey, Lebanon, Qatar
	2012	GCC, including Bahrain, Kuwait, Qatar, Saudi Arabia
	2015	17 countries, including India, the USA, the UK

THE REVIEW CRITERIA:

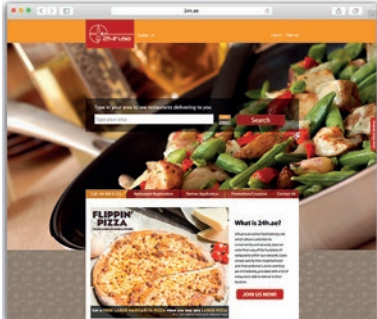
- **Attraction:** Looks at the overall design, tone of voice, community engagement, and branding.
- **Functionality:** Grades the ease, intuitiveness, and robustness of the search, signup, address setup, ordering, and checkout experience.
- **Discovery:** Rates the available restaurant selection, promotions, and menu presentations.
- **Support:** Evaluates the responsiveness of customer care, and the clarity and efficiency of conflict resolution.
- **Mobile:** Ranks the experience, design, and feature set of the brands' mobile apps or responsive sites.

24H REVIEW



24h tries to deliver a “convenient and secure place to order food online,” but offers a vanilla experience and a lack of attention to security.

24H REVIEW



ATTRACTION

An old-school aesthetic, clashing styles, and visual inconsistencies preclude a good visual impression, and the copy is nothing to write home about. 24h is very active on social media, but timely messaging could help – no more tweets about breakfast bagels at midnight!



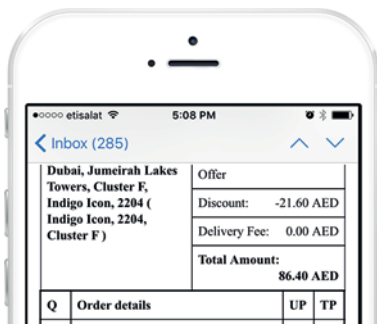
FUNCTIONALITY

Forms are major pain points – error messages appear as illegible red text on a black background, and security falls flat – a password reset resulted in an email with our password in it. A wealth of payment options (including PayPal!) is great – but the password fiasco made us wary about security.



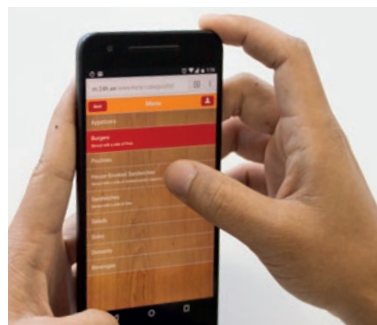
DISCOVERY

A huge variety of restaurants, and the homepage's "popular items by area" and "new promotions" are nice touches. Special offers are enticing, but a filter to find them all would be ideal. 24h offers "reward points" on every order, but their value is indecipherable and it isn't clear just how to redeem them.



SUPPORT

24h called to alert us of a delay due to high order volume – it was nice to know they were keeping track. But wildly inaccurate delivery times, poorly written forms, error messages, and emails using technical terms such as UP and TP miss the mark on speaking clearly and candidly to the user.



MOBILE

Without a dedicated app, 24h relies on a mobile version of its site. A woodgrain backdrop clashing awkwardly with the brand's primary colors, impossibly long lists of locations and restaurants to scroll through, and no feedback or error messages when missing information while signing up make using it a chore.

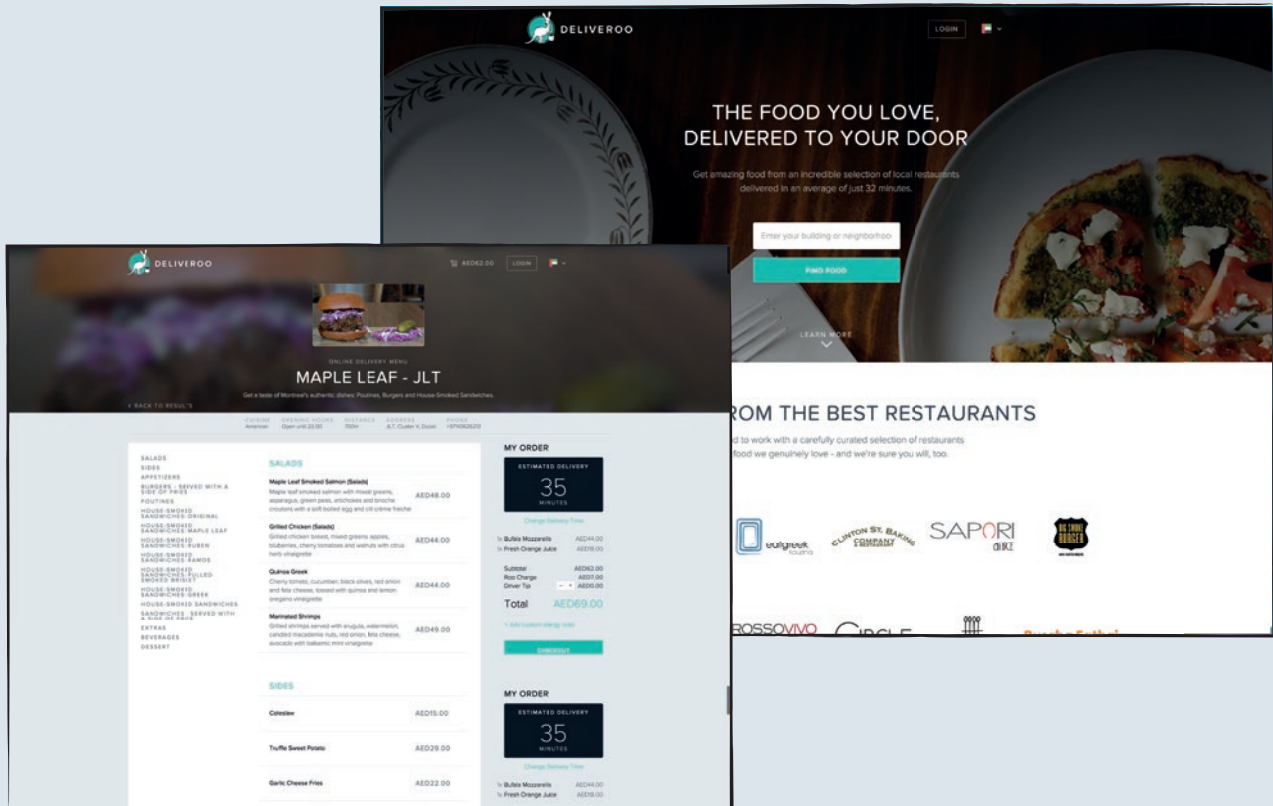


MBLM SUGGESTS

Enhance tableside service:

- Simplify design to match the simplicity of the service, and use clear, exciting language.
- Enable customers by organizing items and give users feedback when filling out information.
- Address security issues before they become news items.

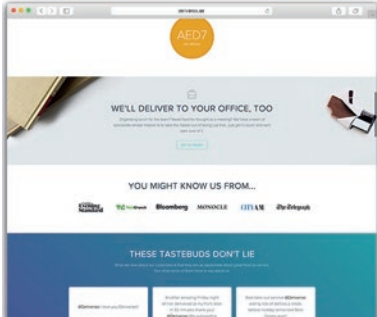
DELIVEROO REVIEW



DELIVEROO

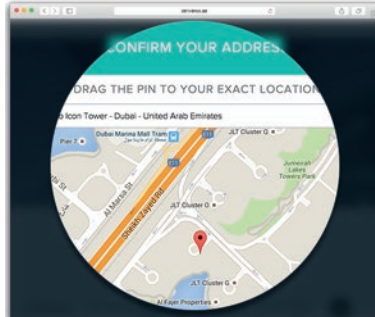
Deliveroo's smart design and user experience make it a pleasure to use, but its steep delivery fee and a lack of differentiation between restaurants' presentation causes issues.

DELIVEROO REVIEW



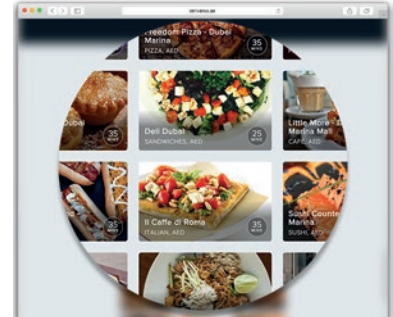
ATTRACTION

It's very evident that Deliveroo has taken the time to craft a distinct visual identity and personality for the brand. The extra attention to detail almost made the food taste better. Deliveroo was also the only one to have branded drivers extend the engagement from click to door.



FUNCTIONALITY

Easy-to-use forms, a location-pin dropper, and the ability to add driver tips made for a smooth process. Only being available in a limited number of areas (which we didn't find out until we tried to order) and payment only by credit card put a damper on an otherwise great experience.



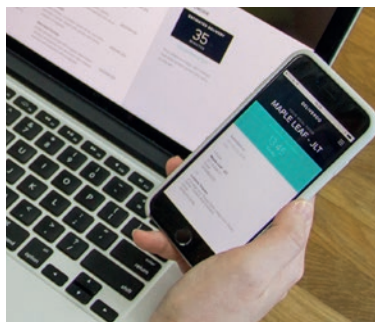
DISCOVERY

A short, yet fantastic list of restaurants and well-written menus are a big plus. However, the inability to search by name and the fact that every restaurant looks the same makes discovery a chore. Deliveroo also lacks reward points, and doesn't have restaurant offers, even when other services have them for the same restaurant.



SUPPORT

Registration caused an unannounced test charge on our cards, and an email address change request resulted in unbranded support ticket emails – strange in light of what was otherwise a consistent experience. A hefty universal AED 7 delivery charge made us have second thoughts about reordering.



MOBILE

The app follows the website's design sensibility and usability. Unique functions such as the ability to use your current location and add credit cards with a camera scan make the app shine. Now all Deliveroo needs is an Android version so it they can cater to the whole market!

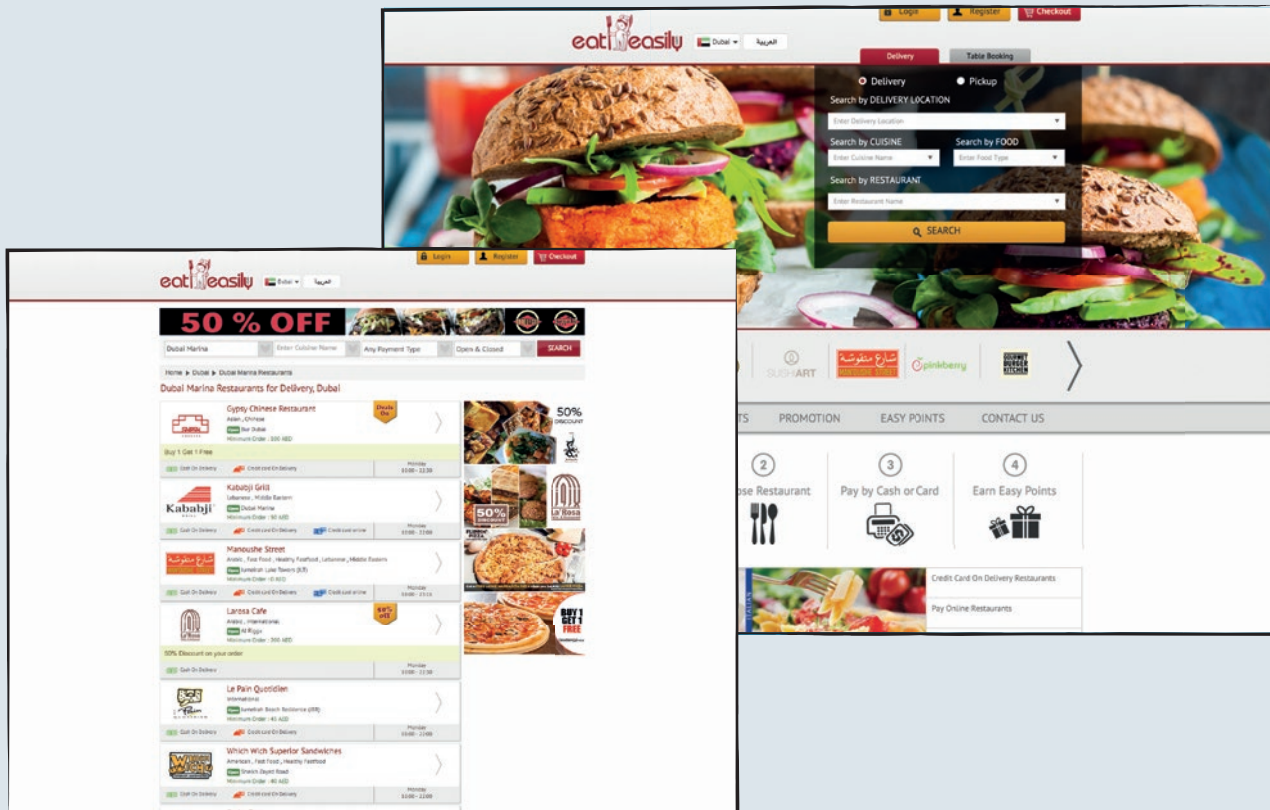


MBLM SUGGESTS

Tweak the settings:

- Clarify the search experience by removing unsupported locations.
- Create differentiation between restaurants, and add search and filter options.
- Lowering delivery charges could help make Deliveroo a go-to site.

EATEASILY REVIEW



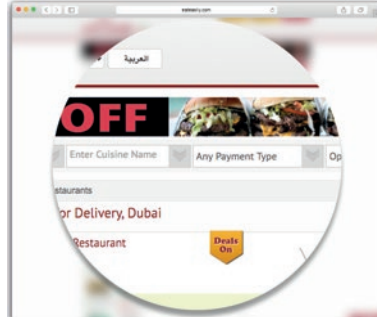
Eateasily has the basic ingredients but lacks the special sauces and table setting to make the whole experience stand out.

EATEASILY REVIEW



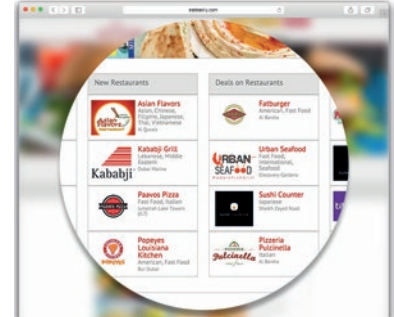
ATTRACTION

Good use of white space and fewer ads give the site a clean look. But on repeated inspection, the shortcomings become more evident – conflicting button styles, problematic spacing, and liberal use of shadows all detract from the visual experience.



FUNCTIONALITY

The ability to search by menu item is an interesting thought, but given that there are 4 different ways to spell shawarma, it's not all that useful. We couldn't search by restaurant once in the results, and the inability to sort results or filter by price ranges was frustrating.



DISCOVERY

The homepage does a good job of showcasing promotions, new and popular restaurants, and featured vendors. The generic (or sometimes completely missing) menu descriptions, along with a confusing arrangement of search results made exploring for new eateries cumbersome.



SUPPORT

When customer service passed the buck and simply arranged a callback from the restaurant for a late order, we felt a bit abandoned. Promotional emails have no unsubscribe options, immediately making us frown. Overall, it seemed that Eateasily wasn't all that keen to develop a relationship with the user.



MOBILE

With simple ordering and user favorites, the app does its job – the long list of restaurants could be made simpler with search and sort functions, though. The constant push notifications for promotions (one almost every day) are a total dealbreaker and made us regret installing it.

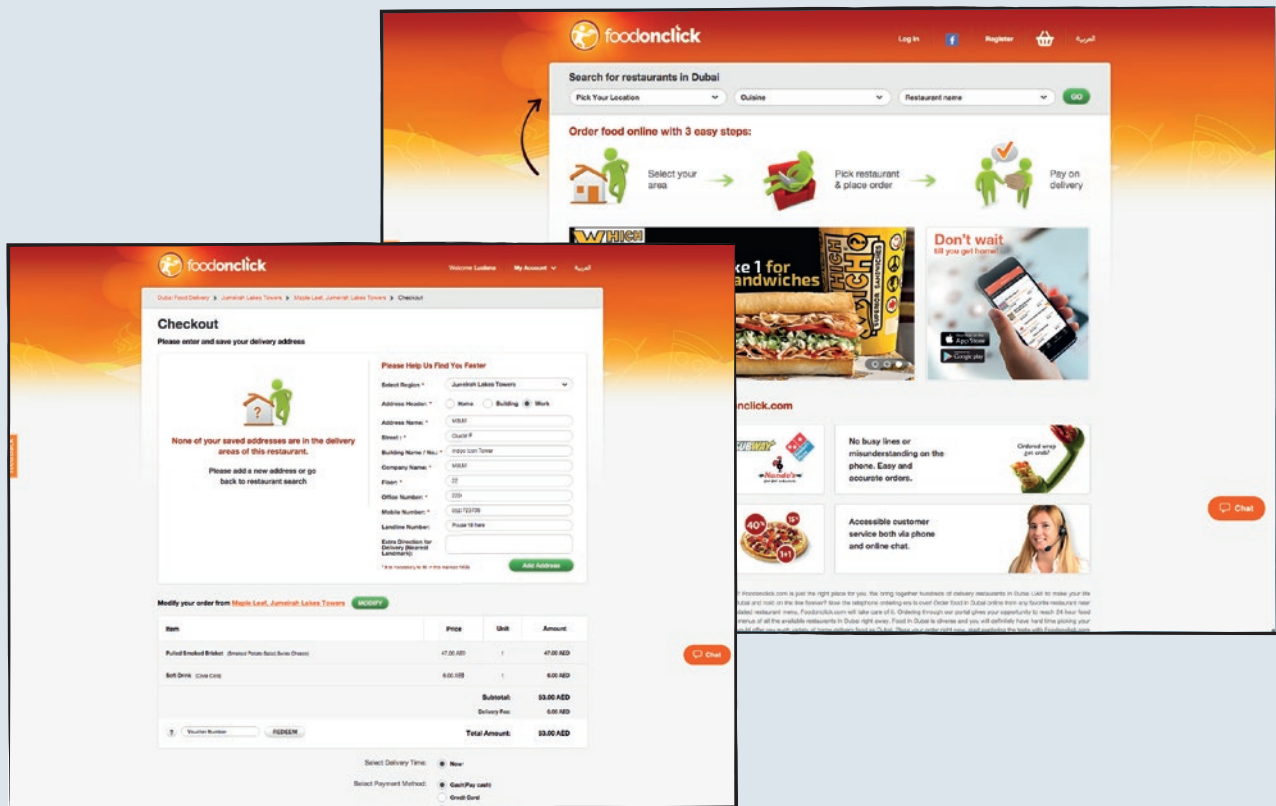


MBLM SUGGESTS

Set the table:

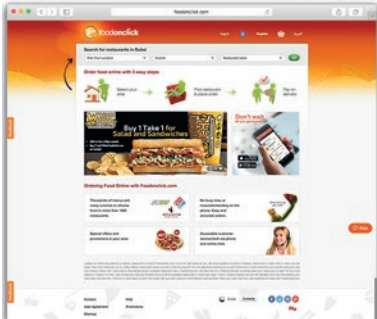
- Perpetual push notifications and promotional emails without unsubscribe options are a no-no.
- Elevate the sophistication of the design by paying attention to the fine details.
- Adding extra functionality, such as location detection or step-by-step updates through the delivery process, could make for great app enhancements.

FOODONCLICK REVIEW



Foodonclick's functionality on the website and app hits the spot, but the brand's packaging makes the experience short of perfection.

FOODONCLICK REVIEW



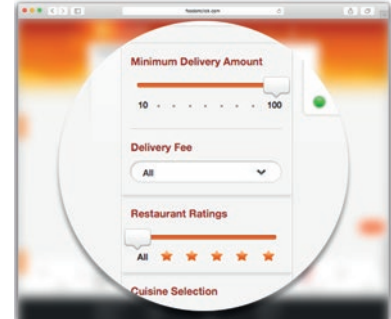
ATTRACTION

Foodonclick's pages suffer from inconsistent icon styles, clashing ads, overall clutter, and disorienting arrows that lead you back up the page. The design of forms and search results fares better, but generic stock photography and illustrations weaken the brand.



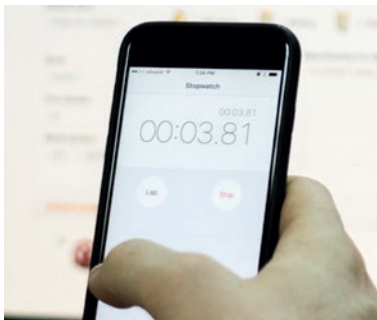
FUNCTIONALITY

Facebook login is good to have, and signup and password reset were intuitive. Comprehensive filters and sort functions help make search and navigation clear. A form field allowed us to add requests to individual items (no cheese!) but requests for the whole order (bring change for 500 dirhams) would also help.



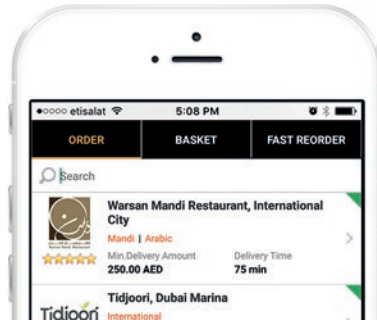
DISCOVERY

A range of promotions is good, as is the ability to filter by them, but Foodonclick has a smaller selection than that offered by some other services. While user ratings helped us sort through the restaurants, menus were often missing descriptions and images, making decisions tough.



SUPPORT

A live chat function provided prompt service, but delivery times can't be found in the confirmation email, and our order showed up over 40 minutes earlier than what the site led us to believe. We also received a call right after ordering to confirm our order – strangely redundant.



MOBILE

While the app was easy to use and had strong functionality, it wasn't very attractive. A fast reorder option was a welcome addition for those of us that get hooked on specific dishes. The lack of any added functionality, such as location detection, was quite disappointing.

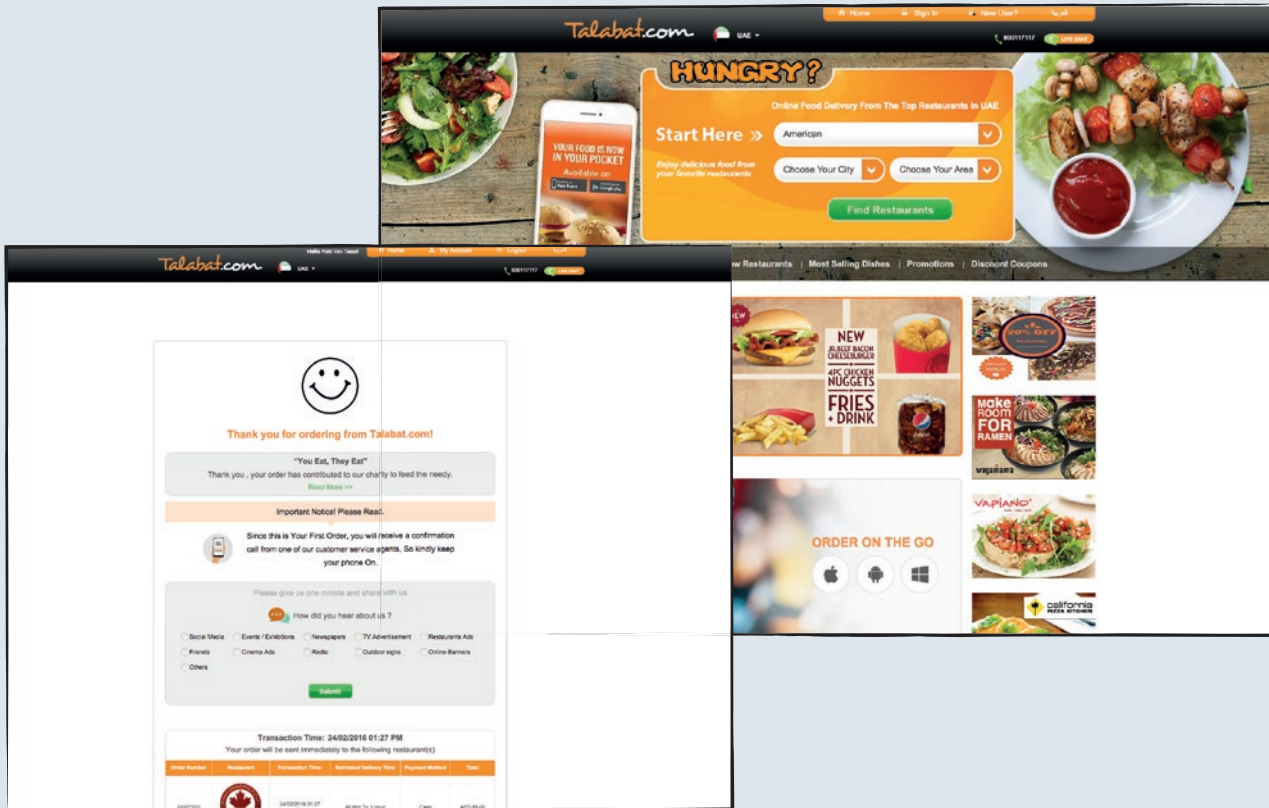


MBLM SUGGESTS

A dash of finesse:

- Using good imagery of the food, creating a custom illustration style, and adding some witty writing could spice things up.
- Pushing the mobile app past the necessities with features such as location detection can take advantage of the supercomputers in our pockets.

TALABAT REVIEW



Talabat.com

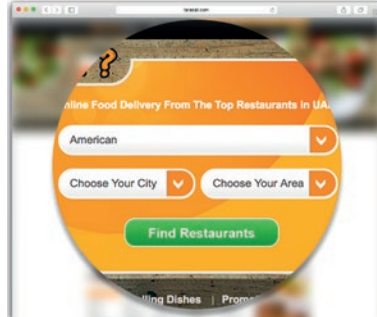
Good functionality leads to a straightforward experience, but ironing out technical bugs, addressing design inconsistencies, and fixing poor customer support are vital needs.

TALABAT REVIEW



ATTRACTION

Rows of ads plus a slew of styles for buttons, highlights, and text all interfere with the service. Confusing messaging such as “Your food is now in your pocket” and generic calls to action prevent the brand from engaging fully. However, its advertising and social posts struck a chord through satire.



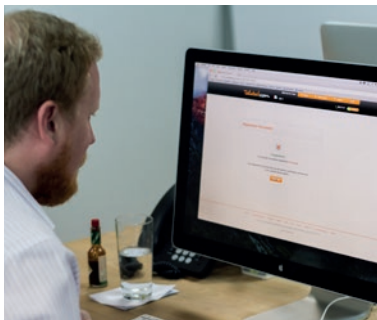
FUNCTIONALITY

A painless checkout process and multiple payment options are highlights of solid functionality. The regular filters are present and reliable, but results are inexplicably peppered with closed restaurants. Strangely, the page reloaded twice when entering our location, and made the site feel like last year’s tech.



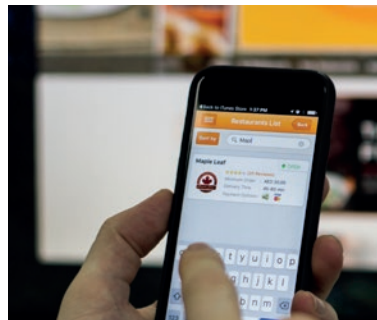
DISCOVERY

Restaurant reviews are convenient and helped guide decisions, and Talabat takes it further by allowing reviews of dishes too. The reorder functionality, ostensibly a great way to encourage repeat business, doesn’t work too well – redirecting to the restaurant page instead of filling up our cart.



SUPPORT

Talabat failed us in customer service when an order that didn’t show up within an hour made us have to call and check in on it. The agent was flat-out unhelpful, claiming that it was on its way multiple times, even asking us to check our order. Talabat’s constant promotion of the app online and in emails made us tired.



MOBILE

Dedicated apps for iOS and Android provide the same services available online. Troubled design plagued by stretched icons and inconsistent styles doesn’t make the app easy on the eyes, and a full screen ad on first load and constant push notifications for promotions made the experience tedious and a near-immediate uninstall.

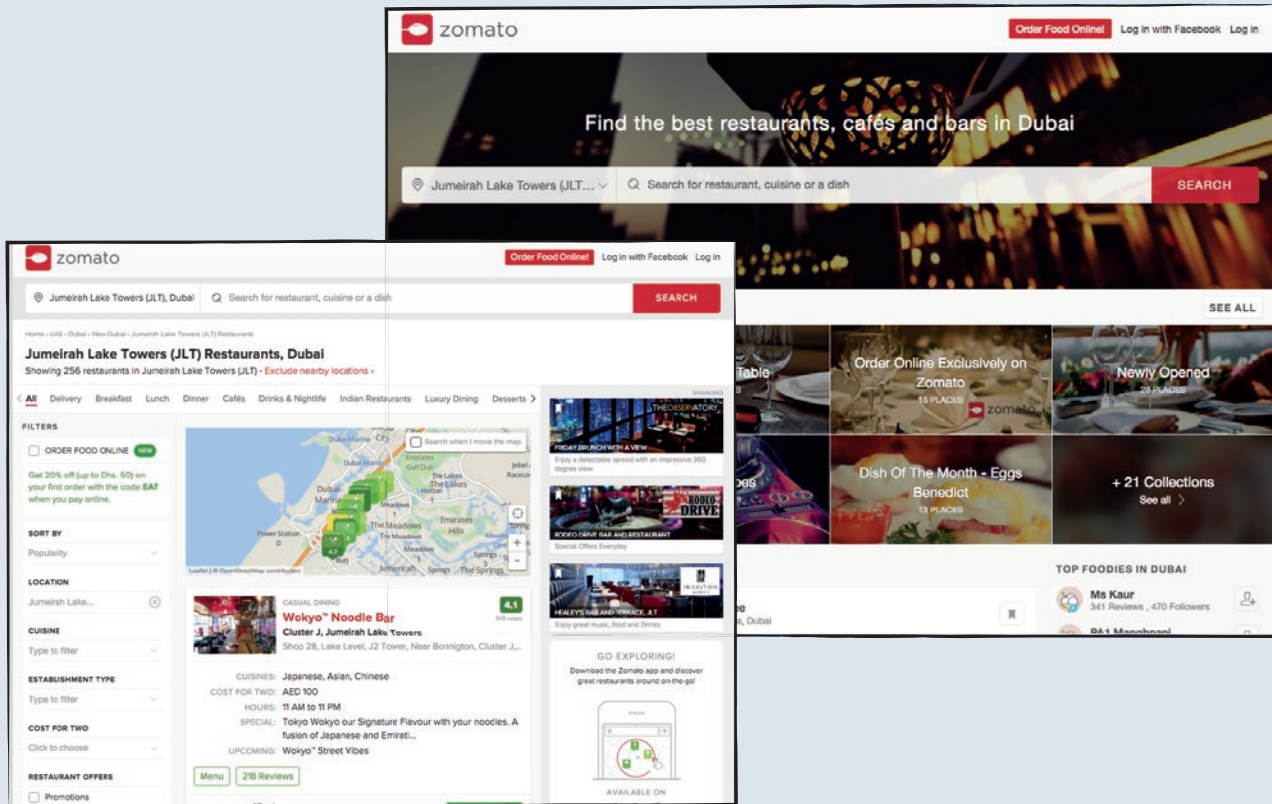


MBLM SUGGESTS

Tidy up the marketplace:

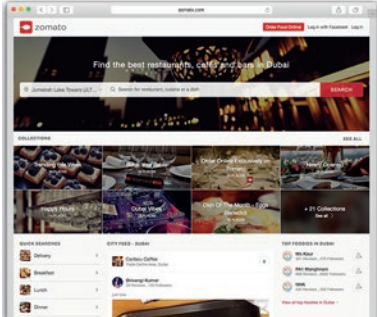
- Take a hard look at how customer service works – unhappy customers rarely return.
- Revisit design across the app and website to unify touchpoints with a thoughtful approach.
- Stop using the app to push constant promo notifications to users – it gets tiring.

ZOMATO REVIEW



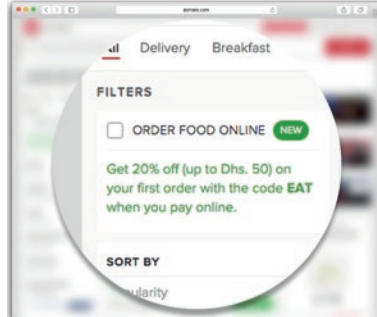
Zomato excels at making us try new things with its extensive user reviews and foodie ecosystem, but suffers from growing pains due to its origins as a review hub.

ZOMATO REVIEW



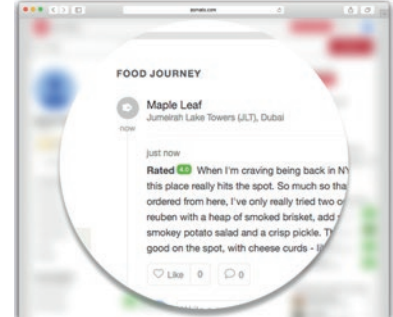
ATTRACTION

Consistent design elevates Zomato's offering, but the plethora of functions provided, from reviews to bookings, orders, and user collections, results in overwhelming pages. Zomato's use of social channels stands out by engaging with foodie communities worldwide.



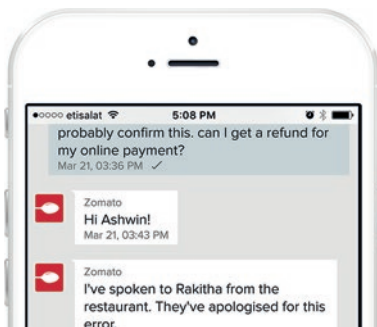
FUNCTIONALITY

Signup, ordering, checkout, and reordering are seamless, but searching for restaurants that deliver can be frustrating. There's a "delivery only" checkbox, but it often shows non-delivery restaurants a few pages into the results, and using filters sometimes overrides the checkbox!



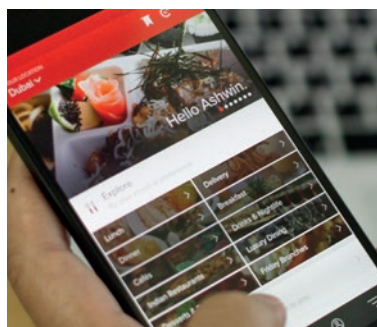
DISCOVERY

User reviews and the ability to bookmark restaurants and follow others' journeys are great ways to help make decisions! Featured restaurants and offers are a plus. Standards on how restaurants create menus could help – many lacked descriptions, leaving us scratching our heads.



SUPPORT

Delivery times were spot-on (unlike some competitors' vague estimates) and email communications were clear. Combined with multiple avenues for reaching customer service and quick conflict resolution, we always felt Zomato spoke to us clearly and professionally.



MOBILE

The app offers all the same functionality as the website in a well-made package. But the lack of distinction between delivery and other functions rears its head again. Finding what we wanted in the results and navigating back and forth between pages sometimes became a pain.









MBLM SUGGESTS

Tie up loose ends:

- Uncomplicate the experience by clearly separating dine-in only from delivery.
- Align pricing to competitors – some delivery minimums are sky-high and made us walk away.
- Add intelligence – crunch all your user data to suggest new things to try.

READY, SET, DELIVER!

	ATTRACTION Design, tone of voice, customer and community engagement	FUNCTIONALITY Search, signup, address setup, ordering, checkout	DISCOVERY Restaurant options, promotions, menu presentation	SUPPORT Feedback along user journey, communications clarity, support	MOBILE Apps or responsive sites (experience, design, features)
	● ● ● * *	● ● ● ● *	● ● ● ● *	● ● ● ● ●	● ● ● ● *
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ORDERING WITH INSIGHTS



While we were investigating the ordering ecosystem and reviewing individual brands, a number of differentiators stood out as features that propelled services above and beyond their humble initial offerings, and made our experiences more appetizing.

ORDERING WITH INSIGHTS

BUILD A STRONG BRAND

Every step of the online ordering process is a chance to engage the user through beautiful design, intuitive functionality, and smart messaging.

What works:

Deliveroo's attention to detail in design, strategy, and communication.

MAKE MOBILE CONVENIENT

A hassle-free mobile experience that uses a phone's full capabilities can quickly earn a brand a place on users' home screens, and can encourage repeated use and reorders.

What works:

Zomato and Deliveroo's apps keep us coming back through seamless experiences.

HELP USERS DECIDE

A lot of restaurant options can seem like a good thing, but if it leads to users being unable to make a decision quickly and efficiently, the experience is compromised.

What works:

Deliveroo's curated restaurant list: Zomato and Talabat's restaurant reviews.

CREATE A CULTURE

Ordering food online is the baseline for all of the brands reviewed. Differentiation means taking it a step further, and inculcating a love for food.

What works:

Zomato's foodie ecosystem makes us want to explore the landscape.

JUST SOMETIMES, DIAL INSTEAD

Every service tried to optimize our time, but when we know the folks at a restaurant and they can already guess our orders, calling them directly can be simpler and friendlier.

What works:

An MBLM favorite, Innlay Asia, knows many of us by name (and takes phone orders in under half a minute).

OUR WINNER: ZOMATO!



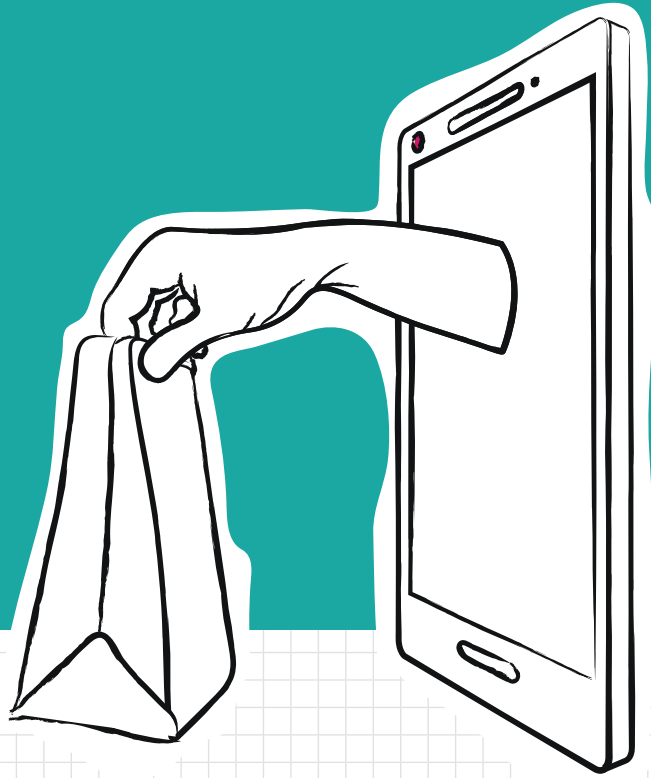
After scarfing down our food and wiping the sriracha off the boardroom table, we all remarked that Zomato and Deliveroo stood out among a sea of sameness with smart design, enticing writing, and excellent customer engagement.

Zomato complicates user experience with cluttered interfaces and by conflating dine-in venues and delivery joints, but its unmatched foodie culture and wealth of reviews make finding new restaurants exciting.

Deliveroo's hefty delivery fee, lack of service in many parts of Dubai, and lack of distinction between restaurant offerings are problematic, but its unique restaurant selection and slick interface had us pining for more.

Zomato wins for now, riding on the idea that food delivery can be a social, shared experience, and avoiding the fees that prevent Deliveroo from becoming a regular choice.

THE ENTREPRENEUR'S DILEMMA



The other side to this story of online food delivery is the restaurateur's experience. All of the brands reviewed presumably charge restaurants commission on sales. In return, they provide ready-made visibility in a digital space that smaller businesses may find difficult to penetrate.

RESTAURANTS HAVE OPTIONS

Take the reins:

Even smaller restaurants such as S'wich and Richy's have created their own digital ordering presences. This requires a significant investment for both creation and promotion, but allows restaurants to nurture a relationship with their customers. If you don't have a delivery fleet, companies such as Anyorder offer their drivers as a B2B service to restaurants.

Optimize all the variables:

If your budget is limited, you'll want to join an existing service. You want the service with the largest user base, the best customer experience, and the fewest competitors in your area and cuisine type. Based on customer experience and exclusivity, Deliveroo would be a great place to start. For larger audiences and to boost dine-in sales, perhaps Zomato is the way to go.

Go for the shotgun approach:

If you've got the resources, set up your own service and join the aggregators too. Freedom Pizza maintains its own website and also offers orders through Talabat and Foodonclick. The experience is not optimal (you can't easily split toppings between pizza halves, for example) but certainly nets more customers. But be careful to manage your menus and information accurately across all your digital presences to avoid confusing customers.

With ride-sharing and on-demand taxi services (UberLUNCH, FLUC, Sidecar Deliveries) entering the business in international markets, the online food ordering market is only going to get more competitive. We'll be watching intently as restaurants and customers decide what works best for them and the battlefield for our bellies becomes a little less crowded.



MBLM

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