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Inflated Retail Records

Benchmarking the retail categories accelerating on mobile due to inflation.

Part I: Grocery Stores

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The Top 10 Grocery Store apps are defined as the best performing grocery store apps of the top grocery store companies by revenue (excluding Walmart and Warehouse Clubs). This report identifies:

- Growth tipping point
- Leading apps
- Market opportunities

Kroger
Kroger Co.

Albertsons
Albertsons

Safeway
Albertsons

Food Lion
Ahold Delhaize USA

Stop&Shop
Ahold Delhaize USA

ALDI
Aldi

Publix
Publix Super Markets
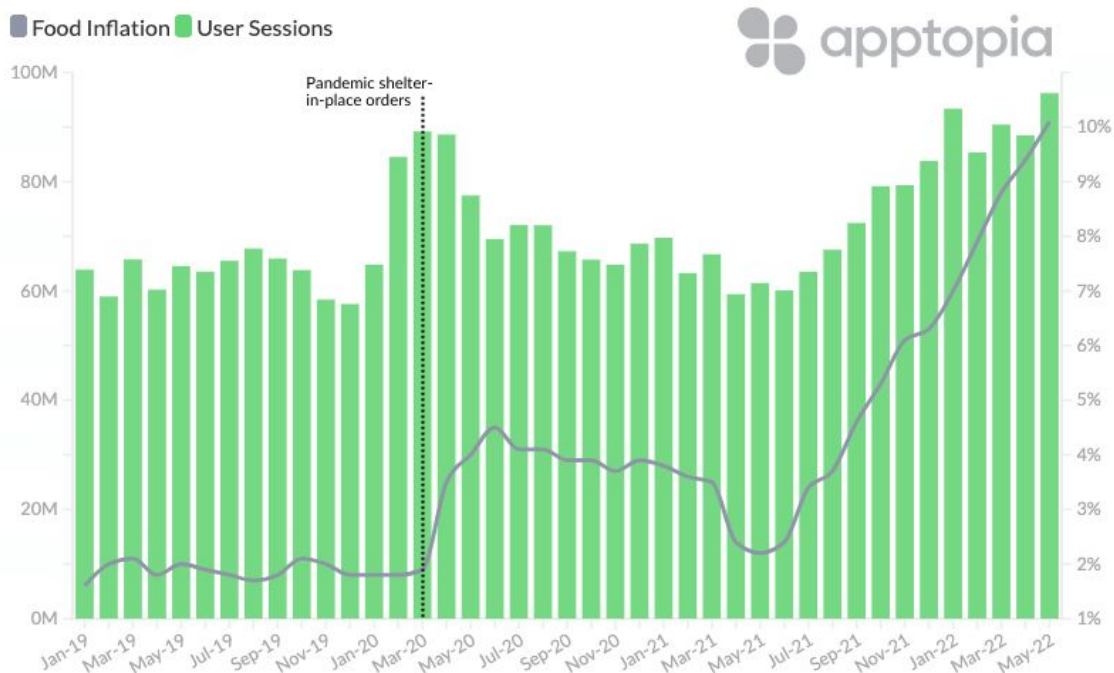
ShopRite
Wakefern Food Corp.

Meijer
Meijer

H-E-B
H.E. Butt

Retail Records | Grocery Stores

User sessions for top grocery store apps climb with food prices

Combined user sessions total among top 10 grocery store apps v. YoY rise in food costs

■ Food Inflation ■ User Sessions

Pandemic shelter-in-place orders

Food Inflation data per U.S. Bureau of Labor

GROWTH TIPPING POINT

User sessions of the top grocery store apps are up 77% YoY in May, rising concurrently with food prices since Q3 2021.

These grocery store apps function as a store loyalty card and a modern day 'weekly ad'. They also enable a convenient, omnichannel shopping experience with features like Curbside Pickup and Shopping Lists with in-store item locators.

Consumer interest in cost-savings looks to be driving the rebound in user sessions. According to Apptopia Review Intelligence, app reviews mentioning the word **"coupon"** increased **75%** from April to May.

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Albertsons grows within 5 points of Kroger after 5 consecutive quarters of growth

Market share by user sessions, U.S.

■ Kroger ■ Albertsons-Safeway ■ Food Lion-Stop & Shop ■ ALDI ■ Meijer ■ Publix ■ H-E-B ■ ShopRite
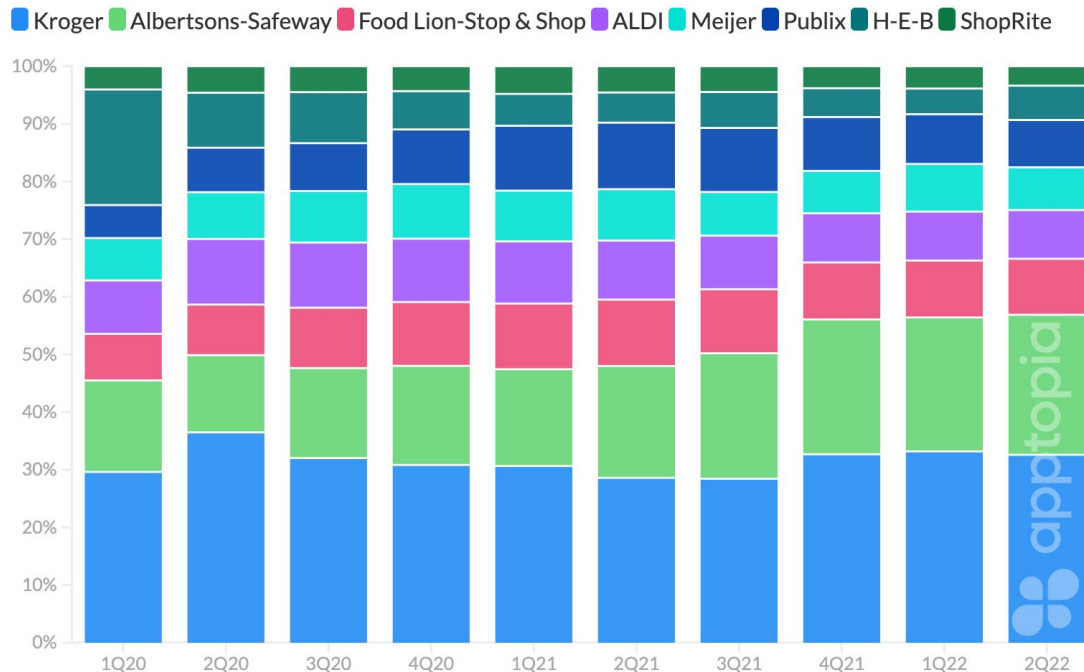
Combined entities have the same mobile publisher and act as regional store banners under the same parent company.

MARKET LEADERS

Kroger leads market share by user sessions and by downloads (the former is shown). With 1300+ locations it has one of the larger addressable markets, but retail footprint does not necessarily equal success. For example, ALDI has more than 2,000 stores and Meijer has 240, but ALDI's mobile market share is only 1 point higher.

Apptopia market research indicates app update frequency correlates with mobile growth. ALDI's last update was 210 days ago, compared to Meijer's update cadence, which is every 9 days, on average.

It's the same for the market's leaders; Kroger and Albertsons make the most frequent app updates – every 7 days.

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Grocery store apps struggle to meet consumer expectations

Impact Score* 🟩 5.1 to 10.0 🟢 0.1 to 5.0 🟥 -0.1 to -5.0 🔴 -5.1 to -10.0 ⬜ N/A

Key Review Topics	Coupon Clipping	Loyalty Rewards	Inventory/Price Check in Cart	Curbside Pickup
Kroger	-0.1 to -5.0	N/A	-0.1 to -5.0	-0.1 to -5.0
Food Lion	0.1 to 5.0	5.1 to 10.0	N/A	N/A
Stop & Shop	-5.1 to -10.0	5.1 to 10.0	5.1 to 10.0	-0.1 to -5.0
H-E-B	0.1 to 5.0	N/A	0.1 to 5.0	0.1 to 5.0
ShopRite	-5.1 to -10.0	N/A	-5.1 to -10.0	N/A
Meijer	0.1 to 5.0	5.1 to 10.0	-0.1 to -5.0	-0.1 to -5.0
ALDI	-5.1 to -10.0	N/A	-0.1 to -5.0	-5.1 to -10.0
Publix	0.1 to 5.0	5.1 to 10.0	-0.1 to -5.0	N/A
Albertsons	0.1 to 5.0	5.1 to 10.0	-0.1 to -5.0	-0.1 to -5.0
Safeway	-0.1 to -5.0	0.1 to 5.0	-0.1 to -5.0	0.1 to 5.0

*Impact Score is a weighted index that measures the effect a term has on Sentiment.

MARKET OPPORTUNITIES

Despite record usage, grocery store apps are struggling to deliver expected mobile features. Based on reviews associated with top keywords 'cart', 'coupon', 'rewards' and 'pickup', we identified the most talked about features – for better and for worse.

The most common word with a negative sentiment is 'cart' and it is related to problems with inventory and price check functionality.

H-E-B is in the green for all features (users did not mention the word 'rewards' at all, so they are satisfied without them). Unsurprisingly, it has the highest Sentiment Score in the market at 81%.

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Shoppers churn to Walmart for a better mobile experience

Kroger

1.0 ☆☆☆☆☆

"I have uninstalled and installed several times now and I still can't clip any coupons. It keeps saying coupons 'Not available on ship orders' and to 'refresh' the page. I shop in person at the store but app keeps saying the same thing. The app is Worthless now! If I'm unable to save by using Kroger coupons then why bother shopping here at all. Looks like Walmart just got a new customer."

Meijer

1.0 ☆☆☆☆☆

"Buggy. We love our local Meijers but with three young kids I have to have pickup orders and the app continually refuses to allow me to checkout. Or if I'm unlucky I can't even get there because the items won't add to my cart to begin with. Even when it does work, I can't check in through the app when I pull up to the space. These problems have happened off and on for the last few months and it's the main reason we switched to Walmart for our pickup orders."

Food Lion

1.0 ☆☆☆☆☆

"Pretty much useless, IMO. It's a confusing and poorly designed app that is difficult to navigate or figure out what it's supposed to be doing. Had a very difficult time trying to get it to work to do anything, to be honest. Guess I'll be sticking with the Walmart app for my grocery shopping."

MOBILE IMPACT

Poor mobile experience has its consequences. 'Walmart' ranked as a top 10 keyword - associated with negative sentiment - for Kroger, Meijer and Food Lion, aas shoppers threatened to leave local stores for Walmart due to its superior mobile experience. Apptopia Audience Intelligence identifies cross-app usage between each store and Walmart, indicating this is not an empty threat.

The most common complaints are consistent with the rest of the market; problems clipping coupons and mobile carts not accounting inventory change.

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Apptopia is the leader in real-time competitive intelligence

Industry Agnostic
Trusted by more than 100,000 publishers worldwide

We enable brands to analyze critical competitive signals across mobile apps & connected devices.
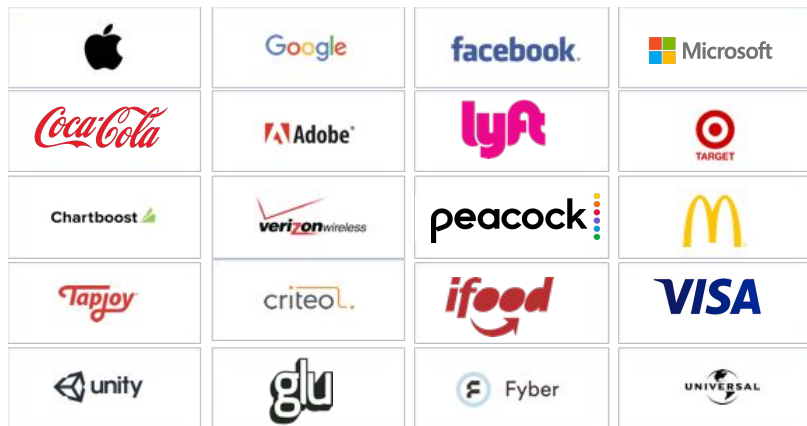
Data on over 7M+ apps
Coverage in over 60 countries

Data Points

- Downloads
- IAP Revenue
- Daily Active Users
- Monthly Active Users
- Avg. Sessions Per user
- Total # of Sessions
- Avg. Session Length
- Total Time Spent In App
- SDK installs/uninstalls
- Demographics
- Cross-app usage
- Feature tagging
- User reviews

Data Granularity

- App
- Store
- Day
- Country

Products & Solutions

Review Intelligence

Natural language processing extracts insights from over 1.5 billion user reviews

Performance intelligence on 7M+ Apps

Downloads, revenue, and usage estimates for over 7M+ apps

SDK Intelligence

SDK install/uninstall data on over 6M+ apps & over 2,900 SDKs identified

Actionable Insights

Audience Intelligence

Demographic insights on over 1.8M apps

Product Intelligence

Bone-deep product insights into every app and mobile game

Search Intelligence

ASO tools and insights to power keyword research and organic downloads

Our Data

Collect

Where does the data come from?

Combining the analytics dashboards for over 125K+ apps with our advanced models, we provide the most reliable estimated data for more than 7 million apps. Over the past 8 years, we have ethically sourced our data without relying on panel data, allowing us to provide the most accurate estimated mobile data without compromising our integrity.
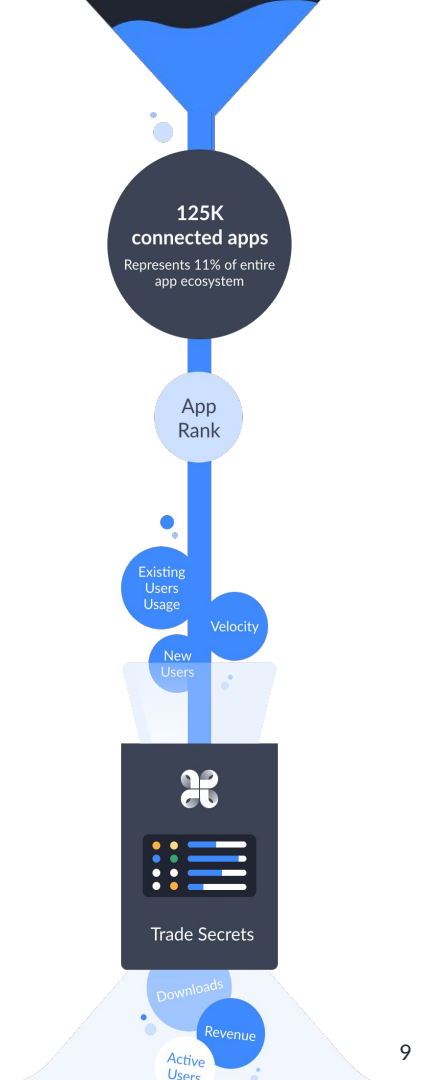
Transform

How is that turned into useful data?

An app's rank is derived from the velocity of new users and existing users' usage. By reverse engineering apple and google's ranking algorithms, we are able to get download, revenue, and usage data for every app in the world.

We also use Trade Secrets to derive usage signals from the metadata of an app such as category, ratings, reviews and release notes.

You can find more information on how we collect data and create our models here: Part 1 and Part 2. Visit our compliance page here.

125K connected apps
Represents 11% of entire app ecosystem

App Rank

Existing Users Usage

Velocity

New Users

Trade Secrets

Downloads

Revenue

Active Users

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Outsmart your competition

Identify market opportunities & threats faster with data.

LEARN MORE

Nu Pagamentos S.A / Nubank

Downloads	Sessions Per User	Avg Session Length	DAU	MAU
1.8M	1.4 sessions	380 Seconds	2.7M	8.1M
^ 14.5%	^ 0.3%	^ 1.3%	v 5.9%	v 4.8%

Downloads

88K
80K
72K
64K
56K
48K

Jan

DAU

2.88M
2.84M

Mobile Banking Downloads

Worldwide

Jul, 2019   Aug, 2019   Sep, 2019

- Nubank   Brazil 99% of WW   • Chime   USA 100
- Monzo   UK 82% of WW   • N26   France 21%
- Revolut   UK 17% of WW