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## **Expanding Glovo Concepts through multi-app model adoption: a study on the delivery sector, in the context of Glovo Portugal**

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Master in Management

Supervisor: Professor Sílvia Cavalinhos, Assistant Professor,  
Department of Marketing, Operations and General  
Management, ISCTE Business School

November, 2022



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Department of Marketing, Strategy and Operations

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The accomplishment of this project, as a conclusion of my master's, was an important goal to attain, not only in my personal but also professional life. It represented a challenge in the sense that it was complete along with the exercising of professional activities, putting my resilience and focus abilities to the test. However, this would not have been possible without all the support from the people surrounding me.

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## **Abstract**

Mobile commerce, and the online delivery business, have been growing, and since covid-19, there is a necessity to understand and adapt to the consumer's new habits. This study is performed in the Portuguese context, contemplating the delivery scenery, with the goal of suggesting a model implementation for Glovo.

The subject under examination is Glovo Concepts. It consists of a franchise business, where Glovo operates its own brands from its partners' facilities. It is a shared-revenue partnership, where Glovo receives a commission over the sold orders, and the restaurant a margin over it.

To understand the consumer behaviour, this study will be based on technological adoption models and previous research on the online delivery context. Additionally, a quantitative survey was conducted to retrieve concrete data for management purposes. A selection of the targeted audience was done through Looker, and later, data was gathered through Qualtrics, and analysis was achieved using Google Sheets and IBM SPSS Statistics 26 software.

The intent is to discover if expanding operations for other platforms besides Glovo is beneficial, contemplating the additional number of orders, gross merchandising value, and main advantages and challenges that can come with it. Ultimately, it is observed that joining Uber Eats, the number one player in Portugal can be beneficial in terms of, not only the number of orders, but also brand recognition, familiarity, and awareness. This way, Glovo Concepts would be present in the two strongest players in Portugal, enjoying each one's client base and partners' perks like communication and interface.

**Keywords:** food delivery application; virtual brand; behavioural intent

**JEL Classification System:** L10 (General Market Structure, Firm Strategy, and Market Performance); L81: Retail and Wholesale Trade; e-Commerce)

## **Resumo**

O *m-commerce*, e o *delivery*, têm vindo a crescer, e desde a pandemia, o comportamento do consumidor alterou-se. Este estudo é realizado no contexto português, com o objectivo de sugerir a implementação de um modelo para a Glovo.

O tema em análise é a Glovo Concepts, um negócio do tipo franchisado, onde a Glovo opera as suas próprias marcas a partir das instalações dos seus parceiros. Consiste numa parceria de lucros partilhados, onde a Glovo recebe uma comissão sobre as encomendas vendidas, e o restaurante uma margem.

Para compreender o comportamento do consumidor, este estudo será baseado em modelos de adoção tecnológica e estudos prévios sobre as aplicações de *delivery*. Adicionalmente, é realizado um estudo quantitativo para recolher dados concretos para fins de gestão. Foi feita uma selecção do público-alvo através do Looker, os dados foram recolhidos através da Qualtrics, e a análise realizada utilizando o Google Sheets e o IBM SPSS Statistics 26.

O objectivo é descobrir se expandir operações para outras plataformas é benéfico, contemplando o número adicional de encomendas, valor bruto de vendas, e as principais vantagens e desafios que podem advir. Finalmente, observa-se que a adesão à Uber Eats, o número um em Portugal, pode ser benéfica não só em termos do número de encomendas, mas também em termos de reconhecimento da marca, familiaridade, e notoriedade. Desta forma, a Glovo Concepts estaria presente nos dois competidores mais fortes em Portugal, desfrutando da base de clientes e regalias de cada um deles, como comunicação e interface.

**Palavras-chave:** aplicação de entrega em casa; marca virtual; intenção comportamental

**Sistema de Classificação JEL:** L10 (General Market Structure, Firm Strategy, and Market Performance); L81: Retail and Wholesale Trade; e-Commerce)



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## **1. Introduction**

### **1.1. Context**

Online retail is one of the most dynamic and fast-growing industries (Droogenbroeck & Van Hove, 2021), that has shown an abnormal growth percentage during the covid-19 pandemic, as a result of the modification in consumer habits (Droogenbroeck & Van Hove, 2021; Eriksson & Stenius, 2020). Niklas Östberg, CEO and co-founder of Delivery Hero, mentions that the changes in the customer's lifestyle and behaviour all over the world, bring a constantly increasing and added value of speed and convenience (Nierynck, 2020).

Since covid-19 poses a high health risk through human contact, measures like self-quarantine, social distancing, wearing masks in every public space, and movement restrictions were necessary. Therefore, food service operations were forced to close or function upon restrictions. Hence, restaurants were obliged to adapt to the situation and rely on takeaway services and online food delivery, which represented a boost for the sector. At the end of 2021, food delivery was a global market worth more than \$150 billion, tripling its value when compared with 2017 (Ahuja, Chandra, Lord, & Peens, 2021), and projected to reach \$323,3 billion by the end of 2022 (Coppola, 2022; Statista, 2022). Revenue is anticipated to display an annual growth rate (CAGR 2022-2027) of 7.60%, and user penetration in this segment is going to be at 23.7%, at the end of 2022 (Statista, 2022).

Contextualizing, food delivery applications are internet-based services centred on the ordering of food online, connecting customers with places that supply food (restaurants, dark kitchens, hotels, etc.), via websites or mobile applications (apps). Within these apps, the client can see a wide range of providers, permitting it to compare menus, prices, reviews, and food categories (Ray, Dhir, Bala, & Kaur, 2019). Regarding the online food delivery service's concrete expectations, various studies keep rising, as the sector keeps evolving. Certain aspects to be taken into consideration are, for instance, order conformity, quality of delivery or service efficiency, and food quality and its inherent satisfaction (Elvandari, Sukartiko, & Nugrahini, 2017; He, Han, Cheng, Fan, & Dong, 2019).

In this study, the context being studied will be in the scope of the online food delivery scenery in Portugal, specifically in a focused project inside the company of Glovo, called Glovo

Concepts. Glovo is a company that started around late 2014, or early 2015, after its Spanish founder and CEO, Oscar Pierre, noticed the growing food delivery needs in the United States. Initially, it was a simple App, designed for the client to “type in a text box” what it wanted, and until today, this remains the focus and vision: “to give everyone easy access to anything in their city” (Glovo, 2022b). Nowadays, Glovo provides a wide range of services besides food delivery, namely quick commerce (including grocery shopping, retail, dark stores, etc.), shipping (to call a courier to deliver something in a different location), and “anything” (the courier buys what is described in the order, from anywhere) (Glovo, 2022a).

Regarding Glovo Concepts, it is a project inside the Food Innovation branch, from Glovo. It consists of a franchisee brand-type model, where Glovo creates its own brands, supply chain logistics, marketing and branding materials, and operates it from its partners’ kitchens, in a shared revenue partnership. These are considered to be virtual brands, as they don’t exist in the physical space, but instead, are sold through the online delivery format, which in this case will be via Glovo. Operationally, each brand will function exclusively per a certain radius, set by Glovo, considering the amount of traffic in the app, in that city, so as to have every operator with its own range of action.

## **1.2. Research Problem**

The general objective of this study is to understand which benefits can arise from turning Glovo Concepts into a multi-app model, mainly in the form of orders and extra gross merchandise value (GMV). This means that, instead of selling the franchisee brands through Glovo only, they can also be added to other platforms such as Uber Eats, Bolt Food, Please, among others.

Thus, the investigation problem lies in comprehending how is the online food delivery scenery in Portugal, its major players, their recognition and volume of business; understanding how Glovo can benefit from its competitors, in terms of client base and advantages of the actual functioning of the company (customer and client support, interface design, promotional campaigns); and the inherent challenges to working in the delivery sector, whether in Glovo or others, to take them as improvement opportunities.

In sum, considering both the objectives and problems of this project, the study intends to answer the following questions:

Q1: What is the extra volume of business (orders) that can come with expanding to other platforms?

Q2: Can the GMV increase, if Glovo Concepts operators build other partnerships?

Q3: Can, working with other platforms, bring more advantages for the partners, covering Glovo's pain points?

Q4: What are the main challenges that can arise from implementing this project?

### **1.3.Relevance for the Company**

The online food delivery sector has been gaining relevance in the last years, due mostly to, as already mentioned, covid-19, which accelerated the growth process in years' time. Therefore, it is showing intense competition in terms of the number of players in the market and the corresponding aggressive strategies to enter or stay in it. Here, Bolt Food is a good example, as its main focus is doing big promotions, to have a lower product price. This is an aggressive strategy as it is focused on volume, instead of profitability.

Glovo Concepts is a ground-breaking idea, still in its first 2 years of history, already present in four countries, and constantly increasing its number of brands and strategies for selling them. However, competitors are starting to notice, and doing similar things. An example is "Not So Dark", a French start-up that just raised an \$80 million series B funding round (Dillet, 2022), which started as a dark kitchen business but is now the owner of a virtual brands' model similar to Glovo's. Just to contextualize, a dark kitchen is an operating kitchen, working for delivery and/or takeaway, so with no possibility of consuming the product in place. They operate in France and Belgium, across 100 cities, with a portfolio of 9 brands, and through platforms like Deliveroo and Uber Eats. Same as Glovo Concepts, they provide the know-how of the brands, ingredient sourcing facilities, and easiness of operations (simplicity in assembling the final product).

Hence, this particular business of Concepts needs to constantly innovate and keep getting better to surpass the competition in the market. By functioning only through Glovo, the franchisee

brands have one single sales channel. This means one place where the brand is visible, which is only accessible to Glovo's client base; a limited reach in terms of the radius of action (and cities) that are open in the app (radius provided to the restaurant differs from company to company, being from four until ten kilometres range); and additional risk for the partner, since all the possibilities of making the business work are relying upon this channel and its ways of functioning.

Besides, Glovo is not the number one player in the country, which means is not the top-of-mind brand for food delivery customers. In Portugal, the market leader is Uber Eats (Petronilho, 2022). When someone mentions ordering takeout, it is said "I'm going to order Uber Eats". This means that most customers visit this app first, and some only have Uber installed on their mobile phones. Translating this, they must have a higher volume of business, more repeat customers (brand loyalty), and happier partners.

All in all, broadening Glovo Concepts to other delivery platforms can increase the brands' visibility, awareness, and word-of-mouth, expanding the client base. This would influence the brand trust, expectedly, in a positive way (the higher the consumption experiences, the more the product becomes trustworthy). All things considered, the volume of orders generated would boost, raising the final GMV. For the partner this, as well, means an escalating rotation of products, avoiding food waste, hence food cost. Furthermore, in this case, the partner has the freedom to negotiate the fee charged, since Glovo will merely ask for the royalties, which could bring additional revenue in the case that the commission is smaller than Glovo's. This information was acquired through an interview with Ignacio Ballvé, Glovo Concepts Portugal Country Manager.

#### **1.4.Method and Structure**

To reach the final goal of this project, besides the inside information given by the professional experience of the researcher as a Sales Executive within the department of Glovo Concepts, the sector will be thoroughly studied and asked, through a survey, about their experience in working in the online food delivery sector, to understand the main advantages and pain points, in an effort to construct a good base and selling point for this project, through a multi-app model.

This project will be divided into the following chapters: Introduction; Literature Review; Methodology; Data analysis and Results Discussion; Implementation; Conclusions and

Contributions; Limitations and Suggestions. In the introduction, a brief contextualization of the topic is presented, followed by the research objectives and problems, put into questions, and also the explanation of the relevance of this idea for the growth and projection of Glovo Concepts. Next, the literature review reunites and examines several important themes that need to be taken into consideration for the construction of this project. Subsequently, the methodology exposes the type of research conducted, the target sample, data collection, measurement scales, and data treatment. Afterwards, the analysis and discussion of the obtained results are approached by characterizing the sample and attempting to answer the proposed questions of the research. Following this, it is important to build a plan for the implementation of the proposed project, to understand its viability, phases, people and resources involved, and also times in which this will be applied. Finally, some conclusions are drawn from all the later chapters, in order to make some suggestions and present the limitations.





## **2. Literature Review**

### **2.1.E-commerce**

Laudon and Laudon (2012) stated that electronic commerce is internet usage towards helping the organization's management or can also be the means by which transactions of products or services take place utilizing the web. These transactions occur between organizations and individuals or between two or more organizations. Turban et al. (2015) characterized e-commerce as an experience that allows buying, selling, transporting, and commercialization of data, goods, or services. Whereas Gefen (2002) claimed something similar, by saying that it is a technological infrastructure to communicate, distribute and perform the exchange of information that will consequently lead to commercial transactions between sellers and consumers on the internet.

Moreover, e-commerce comprehends several types of transactions that are identified based on the nature of the intervenient, which might be individuals, enterprises, or governmental entities (Chaffey, 2009). Currently, these represent the most relevant transactions: Business-to-Business (B2B), Business-to-Consumer (B2C), Business-to-Government (B2G), Consumer-to-Consumer (C2C), and Mobile Commerce (Nisar & Prabhakar, 2017).

### **2.2.M-commerce**

Mobile devices are seen as personal and individualized tools used for a great range of activities. Smartphones can incorporate operating systems similar to those of a computer (Persaud & Azhar, 2012), allowing for activities related to shopping (search of information, reviews analysis, comparison and rating, lists and carts, and purchases), entertainment, banking, social media networking, among others (Grewal et al., 2011; Shankar, Venkatesh, Hofacker, & Naik, 2010). Mahapatra (2017) says that this channel is becoming effective for commerce experiences due to convenience and accessibility (search, evaluation, possession, and post-purchase) (Holmes, Byrne, & Rowley, 2014), but it also represents an opportunity for the consumer to escape reality, increasing happiness and well-being (Dennis, Alamanos, Papagiannidis, & Bourlakis, 2016), associated with the augmented sense of control given by the touchscreen (Brasel & Gips, 2014).

Hence, mobile shopping can be defined as the online searching, browsing, comparing, and purchasing of goods and services by consumers through wireless handheld, or mobile devices,

such as smartphones or tablets (Marriott, Williams, & Dwivedi, 2017). For enterprises, this means an extra source of income, represented by an additional shopping channel, since they can reach the client anywhere, at any time. Fuentes and Svingsted (2017) stated that mobile clients are better informed about prices, technical proprieties, product availability, and environmental consequences. Accordingly, the consumer is shifting from e-commerce to m-commerce, and additionally, due to being personal, the mobile device, can store sensitive data like card details, facilitating and speeding m-payments; the localization feature can potentiate customized offers, etc. (Kalinic & Marinkovic, 2015).

### **2.2.1. Technological Adoption Models**

Du and Li (2019) stated that the popular theories in m-commerce are the Technology Acceptance Model (TAM), game theory, empirical analysis, expectation confirmation model, Unified Theory Acceptance and Use of Technology (UTAUT/UTAUT2), commitment-trust theory, decision-making process, Theory of Reasoned Action, network externalities, interpretive structural model, neural network, and support vector machines. Sari and Subriadi (2022) put all models into three categories: individual behaviour, corporate behaviour, and customer value; and exemplified some of the theories mentioned above. For instance, TAM, UTAUT/UTAUT2, TRA, and the Theory of Planned Behaviour (TPB) fall into the category of individual behaviour.

In the last six years, Sari and Subriadi (2022), found that most of the m-commerce research was built over the TAM. The original TAM uses perceived usefulness and perceived ease of use as predictors of users' tendency to adopt new technology. Perceived usefulness (PU) is the degree to which a person believes that using a particular system would enhance his or her job performance (Sultan et al., 2009), and the perceived ease of use (PEOU) is the degree to which a person believes that using a particular system would be free of effort (Davis, 1989).

Although TAM is a robust and well-established model (Zhang, Zhu, & Liu, 2012), there have been some authors that defend it should be extended by including additional constructs to better clarify and forecast users' acceptance behaviour (Chong, Chan, & Ooi, 2012; Tang, 2019; Wei, Marthandan, Chong, Ooi, & Arumugam, 2009; Wu & Wang, 2005). Zarpou et al. (2012) suggested trust, innovativeness, relationship drivers, and functionality as new variables, concluding that the strongest influence on PU had trust and relationship drivers, whereas

innovativeness was the main antecedent of PEOU. Kalinic and Marinkovic (2015) studied constructs such as social influence (the degree to which an individual perceives that is important for others to believe he or she should use the new system (Venkatesh, Morris, Davis, & Davis, 2003), customization (the degree to which the company's offer is well adapted to meet heterogeneous customers' needs (Anderson, Fornell, & Rust, 1997), mobility (ability to access services ubiquitously on the move), and personal innovativeness (willingness of an individual to try out new things, usually dynamic, communicative, curious, and venturesome people (Bhatti, 2007), concluding that the first two significantly affect PU, the later three substantially impact PEOU, and that PU and PEOU positively and directly influence behavioural intention (the strength of one's intention to perform a specific behaviour (Fishbein & Ajzen, 1975), the most important determinant of an individual's actual behaviour (Zhang et al., 2012).

However, some authors defend that TAM should no longer serve as a baseline model for studies. Lu and Su (2009) stated that experiments using TAM, fail to consider negative emotions, beliefs in the level of ability, and intrinsic motivations. And so, as an alternative, UTAUT was assessed to be the most inclusive and effective in terms of appraising practical and behavioural constructs of technology adoption (Madan & Yadav, 2016, 2018; Tandon, Kiran, & Sah, 2016).

The UTAUT original model was developed by Venkatesh et al. (2003). Performance expectancy (PE), effort expectancy (EE), social influence, and facilitating conditions (FC), are the main determinants and demographics embody moderators. PE implies that the user considers that, by using the mobile app, will accomplish the final oriented goal, resulting in enhanced job performance (Misra, Mahajan, & Singh, 2022). EE, on the other hand, is "the degree of ease associated with consumers' use of technology" (Venkatesh, Thong, & Xu, 2012), so the belief that the technology is easy to learn and operate. PE and EE can be seen, respectively, as the extensions of the PU and PEOU from the TAM. Social influence, according to Rogers (2019), can be divided into two categories: influence exercised by the media (printed and digital) and interpersonal influence derived from the users' social network. Whereas PE, EE, and social influence impact behavioural intention through being functional attributes of technology, FC are considered to impact the concrete use of technology. FC are the consumers' perceptions of the resources and support available to perform a behaviour (Brown & Venkatesh, 2005; Venkatesh et al., 2003). To m-shop involves resources and skills, like using a mobile or tablet, having a connection to the

internet, getting access to the apps intended, and possessing some knowledge about its service functioning and security. A favourable set of FC leads to a superior intention to use mobile commerce.

Later, Venkatesh et al. (2012) proposed UTAUT2, an updated version of UTAUT with three new constructs: price value, habit, and hedonic motivation. Price value refers to the “consumers’ cognitive trade-offs between the perceived benefits and cost of using various applications” (Venkatesh et al., 2012), and some examples are the device, data, and other service charges costs. Habit is the extent to which people tend to perform actions automatically due to learning (Limayem, Hirt, & Cheung, 2007). Finally, hedonic motivation is defined as the enjoyment or pleasure that arises from the use of technology (Brown & Venkatesh, 2005). This new model explained seventy percent of variance to predict users’ behavioural intention to adopt new technology and extended it from an organizational to a consumer context, by adding consumer behaviour-specific factors. Arnold and Reynolds (2003) mentioned six types of hedonic motivation in online shopping: value, role, adventure, social, gratification, and idea motivation.

After the proposition of this model, some extensions surfaced, considering perceived security, innovativeness, stress, perceived satisfaction, trust, perceived benefits, and attitude (Shaw, 2014; Slade, Williams, Dwivedi, & Piercy, 2015). Others consider the perceived risk, which is “the user’s subjective expectation of suffering a loss in pursuit of the desired outcome (Pavlou, 2003), sub-divided into two constructs, namely security risk, and privacy risk. Security risk is the perception of security concerning the means of payment and mechanism for storing and transferring information (Kolsaker & Payne, 2002) or it implies that integrity, confidentiality, authentication, and non-recognition of relationships are ensured (Flavián & Guinalú, 2006). Whilst privacy risk represents the potential loss of control over one’s personal information (Chiu, Wang, Fang, & Huang, 2014).

Apart from the above-mentioned theories, there are other authors that studied different constructs. Zhou and Lu (2011) observed that extraversion, agreeableness, openness to new experiences, and neuroticism substantially impact trust, while only agreeableness and neuroticism significantly affect perceived usefulness. So, trust and perceived usefulness lead to user adoption of technology.

Since habit is one of the main determinants of present behaviour (Ajzen, 2002), Baptista and Oliveira (2015) found that it is the essential antecedent of use behaviour and Hew et al. (2015) discovered it to be the strongest predictor of behavioural intention to use mobile apps. Alternatively, Chopdar et al. (2018) observed that PE has the strongest impact on the intention to use m-shopping apps.

This knowledge is relevant to anticipate what is the consumer's behaviour in the various online delivery platforms that will be studied and differentiate it amongst each other in order to compare it and enforce the best possible outcome from this study. Being aware of the normal conduct of the food delivery applications' clients, allows improvements to be made in the structure of the Glovo Concepts project as a whole, namely the menu design, product pictures, promotions carried out, and campaigns, together with others, and even specifically personalising its attributes to each player in the market and its respective consumer.

### **2.2.2. The effect of M-commerce during Covid-19**

In 2019, the world experienced a pandemic that came to change people's habits and behaviour. The use of masks, isolation or quarantine periods and social distancing became norms, and so various changes were observed, like the shift to remote work (Bick et al., 2020), purchasing through mobile devices, and a change in consumer behaviour, triggering also shifts in the way brands strategize and in its managerial thinking (Jiang & Song, 2022). In a time when some stores closed and others had restrictions, m-commerce served as a facilitator for both consumers and business owners. Kao and L'Huillier (2022) proved this former statement by uncovering that attitude toward social distancing are a significant moderator of purchasing through mobile devices.

For those communities that lived lockdowns or have a vulnerable population, the digital services offered a safer alternative for vital purchases, diminishing the risk associated with this activity in other forms (Eger, Komárková, Egerová, & Mičík, 2021). This drove new users to adopt these services at least temporarily. Adjacent to the decreasing production costs of mobile devices, and their expected adoption in the short-term, for everyday activities, including shopping, the pandemic gave a boost in terms of users. The Global Association of Mobile Operators estimates that in the Asia Pacific, by 2025, there will be 2.7 billion mobile internet users, representing 61%

of penetration, significantly bigger when compared to 2019, where we observe 2 billion users, representing 48% of penetration (GSMA, 2021).

### **2.3.Consumer characteristics and expectations**

Considering the theories previously mentioned, it is important to understand what the consumer expects when utilizing m-commerce and what its main characteristics are. Bigne et al. (2005) explored the influence of gender, age, previous internet experience, and previous experience as an e-shopper on consumer mobile buying behaviour. The study was made in Spain, and they identified young people, of both genders, with experience in internet shopping as the most-likely segment to adopt mobile commerce, segment in which San-Martin et al. (2015) considers perceived entertainment of the utmost importance.

An important aspect of the acceptance of new technologies is privacy risk, where, for example, the mobile device's current location can pose both an advantage and disadvantage. Although it represents a way for a personalized experience, it can mean privacy and security concerns for the user, affecting the customer's trust, and so, the intention to utilize m-commerce (Singh, Srivastava, & Sinha, 2017; Taherdoost, 2017). Usually, this matter of perceived risk is essential to be considered especially with low literacy levels and low awareness about the use of technology countries (Singh et al., 2017).

Zhou and Lu (2011) learned that different personality traits need different strategies to meet their demands. For instance, neurotic users value features like trial usage, unconditional subscription cancellation, and third-party certifications in order to increase their trust. Aldas-Manzano et al. (2009) remarked three personality variables that affect m-commerce intention, which are innovativeness, affinity, and compatibility. Junglas, Johnson, and Spitzmuller (2008) learned that agreeableness, extraversion, emotional stability, openness to experience, and conscientiousness, also personality traits, have effects on perceived privacy.

Additionally, Kim et al. (2014) concluded that users that experience enjoyment while using mobile apps are more probable to adopt them. Yang and Kim (2012) suggest that people using m-shopping get more stimulated by hedonic values instead of utilitarian ones. So, Chopdar et al. (2018) suggested that when marketers want to enhance the shopping experience, enjoyment (hedonic

motivation), social interaction among users (social influence), and better security and privacy protection (privacy risk) should be considered. Additionally, Tyrväinen and Karjaluoto (2019) exposed that the stage of mobile use, directly impacts which features are more relevant to target the consumer, being that the initial user values utilitarian benefits, whereas the later-stage user appreciates hedonic characteristics.

To understand how to create a unified customer experience, Bilgihan et al. (2016) discovered that the easiness to locate the website/app, ease of use, PU, hedonic and utilitarian features, perceived enjoyment, personalization, social interactions, and multi-device compatibility are the antecedents for it; whereas brand engagement, positive word-of-mouth and repeat purchase are the outcomes. Furthermore, to understand how to engage and please the consumer, Lin (2006) found that perceived value, trust and habit impacts customer loyalty, and customer satisfaction plays an essential part between perceived value and trust to loyalty.

Pondering the usage of online food delivery, Yeo et al. (2017) highlighted post-usage usefulness and perceived convenience motivation as significantly affecting customers' behavioural intentions to adopt online food delivery services, and discovered that convenience, time and price saving, prior experience, hedonic motivation, and behavioural intentions strengthen each other. Roh and Park (2019) exposed usefulness, compatibility, and subjective norm, as significant determinants of the intention of Food Delivery Applications (FDA's) adoption. Moreover, Elvandari et al. (2017) learned that order conformity, quality of delivery, food quality, and costs are the most significant attributes affecting users' intentions. He et al. (2018) reached a similar conclusion, considering that satisfaction is associated with food quality and service efficiency.

Contemplating the continuance intention of using online food services, Cho et al. (2019) concluded that trustworthiness is the most significant impactor. Whereas Alalwan (2020) demonstrated that online reviews, ratings, and facility of online tracking alongside other UTAUT2 variables play a crucial role in the consumer's intentions to remain utilizing these services. Lee et al. (2019), also took advantage of the UTAUT2, and revealed that information quality, habit, and social influence significantly affect the continuance of the use of FDA's.

In addition, examining the context of covid-19, Mehroliia et. al (2021) determine that consumers that exhibit a high-perceived threat of the virus, less product involvement, a less

perceived benefit on food delivery, and less frequency of online food orders are less probable of ordering food through online food services. Whereas Zhao and Bacao (2020) concluded that satisfaction is the most significant factor, and perceived task-technology fit, trust, performance expectancy, social influence, and confirmation positively impact, direct or indirectly, the users' continued usage intentions of FDA's throughout the pandemic period. Finally, Kumar and Shah (2021) found that app aesthetics generate pleasure, arousal, and dominance emotions amongst consumers during the Covid-19 period, with pleasure being the most significant predictor of continuance use of FDA's, followed by dominance.

#### **2.4. Online Food Delivery**

A particular sector that grew and gained popularity during the pandemic was Food delivery Apps (FDA's), mostly related to the closure of food services like restaurants, bars, hotels, and canteens, allied with the great shift towards remote working. These applications offered benefits for both catering and hospitality enterprises, and customers, by supplying convenient and efficient online order and offline delivery services (Zhao & Bacao, 2020).

FDA's can be grouped into two categories (Ray et al., 2019): the first being the restaurants, like KFC, McDonald's, and Pizzahut; and the second is the intermediary platforms, such as Uber Eats, Glovo, or Bolt Food (Roh & Park, 2019). Said services offered multiple benefits during the pandemic, by having contactless delivery, which is the delivery of food at the gate/door of customers, without direct contact (Zhao & Bacao, 2020). These effectively maintained social distancing, enhanced service range, and reduced the spatio-temporal interval of sales and consumption processes (Liu & Wang, 2016).

Additionally, these applications have numerous features that help both customers and restaurants to overcome complications like long wait times, traffic jams, misunderstandings, and delays in delivery. In the app, the consumer has access to various food options, that incorporate online menus with descriptions and attractive images, aspects able to influence consumer purchase behaviour (Pillai, Kim, Haldorai, & Kim, 2022), customized with visual cues such as colours, fonts, graphics, and images related to consumer engagement (Kapoor & Vij, 2018). Regarding technicalities, it can forward orders to producers, monitor payments, and offer tracking tools, among others (Pillai et al., 2022).



### **2.4.1. Online Food Delivery Sector in Portugal**

According to a Kantar study, done for Centromarca (Pinto, 2021), which analysed the behaviour of ten different countries' consumers, concluded that the delivery business grew more significantly in the European markets. Compared with the homologous semester, Spain increased from 44 to 51%, The United Kingdom from 50 to 60%, France from 54 to 64%, and finally, Portugal, which showed the biggest growth, went from 57 to 73%, also raising the percentage of heavy buyers, an important aspect, meaning the consumer that order meals once or more times a week.

Examining the online food delivery revenue, there is a clear difference between 2019 and 2020. The pre-pandemic value was 95,55 million euros, whereas the first year of covid-19 pandemic registered 125,40 million euros, meaning a 131.2% increase. This is related to the rise in the number of users, which grew from 1,9 million users in 2019 to 2,4 million users, the majority being between the age of 35 and 44 years (27.5%), followed by the ages between 25 and 34 years old (22.2%), 45 to 54 years old (21.7%), 18 to 24 age gap (25.4%) and finally, with 13.3%, the ages between 55 and 64.

Since the penetration of Uber Eats in 2017, in Portugal, the market boomed, and new players got in. The scenario in 2021 is portrayed with Uber Eats as the market leader, with 25% of the market share, followed by Glovo with 20%, Just Eat/ Takeaway.com and Telepizza with 10%, and Yum! Brands and Zomato with 5%. These are the most recent data, however, Takeaway.com left the Portuguese market in 2022, so some changes are happening (Petronilho, 2022).

### **2.4.2. Glovo**

Glovo is a Spanish-based tech company that creates innovative solutions by connecting customers, businesses, and couriers, also with concerns about having a sustainable impact on its communities and ecosystems. With the vision of giving everyone easy access to anything in their city, although food is its core business (Glovo, 2022b), the company also delivers groceries and retail goods, and has the category of “anything”, meaning that the customer can describe what he needs and get it delivered to its doorstep (Glovo, 2021). Basically, the Glovo app is designed for the customer to purchase through it, the courier picks the order up and delivers it to the address given by the consumer.

Nowadays, Glovo is a company that esteems its culture among employees, partners, and couriers, always appreciating their core values of “gas”, “good vibes”, “high bar”, “care”, and “stay humble”. Looking back, Oscar Pierre, 22 years old at the time, one of the founders of the initially called “Globo” (balloon in Spanish), together with Sacha Michaud began operations in 2015, after gathering the first round of investment. The first restaurant signed in 2016, in the start-up origin city of Barcelona, was an Indian store.

By 2020, the year that the covid-19 pandemic started, Glovo was already present in 19 countries and with the mission of being the leader in every single one, the company in Latin America was sold to Delivery Hero (DH), a berlin-based group, in a deal worth 230 million euros, leaving DH with a portfolio that now included also Peru, Ecuador, Costa Rica, Honduras and Guatemala and getting to expand its existing operations in Argentina, Panama and the Dominican Republic (Reuters Staff, 2020). In 2021, the firm closed its biggest investment round, of 450 million euros, consolidated with more than 3000 employees, four tech hubs, six new companies acquired, and the goal of becoming carbon neutral being attained. By the end of that year, in December 2021, DH, the German delivery company previously mentioned, became the major shareholder. Holding shares since 2018, having purchased Glovo’s operations in Latin America, they now detain about 94% of the company's shares. Joining the Delivery Hero’s portfolio, Glovo is currently present in 25 countries, so as of now, represented also by Foodora, Foodpanda, Talabat, and Yemeksepeti, DH is present in a total of 74 countries, reaching 2.2 billion people in four continents (ECO, 2022).

To have a visual representation of the application nowadays, figure 1 is displayed underneath, as well as a depiction of a Glovo courier, the person in charge to transport the product to the client:

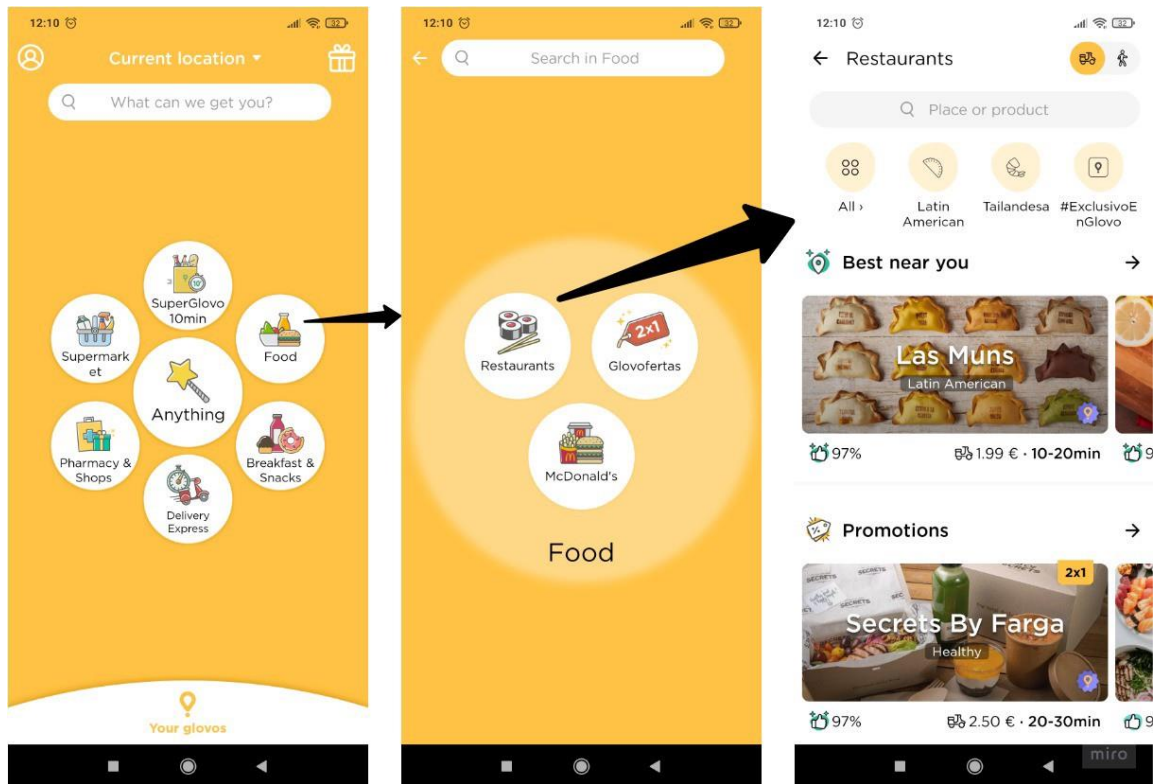


Figure 2.1: Glovo app (Source:Wastell, 2021)

### 2.4.3. Glovo Concepts

Glovo Concepts is a project that started in August 2020 and fits into the branch of Food Innovation of Glovo. It is a program for virtual-only food brands developed in Barcelona, with the purpose of filling market gaps and tendencies in the content that the app displays in certain cities, being later operated by some of Glovo's current partners. These brands are developed by a marketing department, in charge of the branding and a product development/operational division, in control of elaborating recipes and testing them through a restricted market (laboratory based in Barcelona) before launching them.

Glovo provides ownership and all the know-how in a franchise type of business, so partners have full access to brand names, menus, ingredients, recipes, and marketing materials. The main goal of the project is to give partners an opportunity to expand their business, utilizing the same capacity operating already, providing an alternative and complementary revenue stream. This way,

with the same facilities and staff, small businesses have the possibility to gain extra income with brands that are already created and established on the market.

Alberto Bonhomme, first director of Glovo Concepts, stated that the purpose of this project is to help small restaurants, that are still recovering from the pandemic, to launch brands that are innovative, with minimal investment costs. In his words, “this will allow them to implement at speed and take advantage of the delivery service becoming the essential part of any business, regardless of their size. Through our pioneering technology, Glovo is now able to create a unique opportunity for restaurants to adapt their businesses to the new normal and continue expanding with zero risks” (Keane, 2021).

Restaurants have no entry fees and are subject to the usual commission charges from Glovo, just like in their own business. The minimal investments mentioned above are represented by some kitchen equipment the restaurant may not possess, required for the preparation of the final menus, and raw materials for posterior sale. These raw goods are already budgeted with a logistic centralizer, intended for the partner to have easy access to all materials in one place, meaning fewer worries about stock management and order placement. This mentioned logistic centralizer is Havi Logistics, a big company that stores products in mass quantities, and later distributes them to the corresponding establishments, thereby solving supply-chain issues. An example of another enterprise in business with them is McDonald’s.

All the brands are created in a sense to serve as a complementary service for the restaurant, fitted to have only final preparations of simple products, done in five to ten minutes, always supported, and accompanied by a training chef. The marketing plan is created and executed by the Glovo team to ensure the best use of data available and better outcomes in sales. For Glovo, this project is a way of increasing content in the application, both in diversity and quantity, boosting profitability and reducing the dependence on key accounts like McDonald’s. Because it has a location-focused strategy, this means it only places partners in areas with significant traffic in the app, which not only assures a certain level of orders for the partner but also a higher contribution margin for Glovo, generally higher than the average of the country.

Succinctly, this project is a collaboration between Glovo and its partners. All the management, support, training, and know-how are provided by the company, whereas the partner,

the exclusive owner of the brand in the corresponding area where the restaurant is located, is entrusted with the stocking of the product, final preparation, and delivery to the courier.

Since January 2022, the project has a new leader. Quentin Vanbever, previously general manager of Uber Eats in Panama & Caribbean, and Glovo France, is leading a new strategy for the venture (Vanbever, 2022). Glovo Concepts, which first started in Spain, is now present in three other countries (Portugal, Italy, and Romania), in ninety-one cities, counting 580 restaurants. Furthermore, it holds a portfolio of ten brands: Bendito Burrito, Taqueria Guadalupe, Milanese House, Mila's Sandwiches, Meraki Pita, The Urban Kebab, Dirty Burgers, Scandal Burgers, Hot Dog Nation, and French Tacos Club (Glovo Concepts, n.d.). In the pictures below, two of these brands can be observed, Bendito Burrito, the first brand from the project, and Scandal Burgers, as well as the looks of one Milanese Houe store in the Glovo application, whereas the rest of the portfolio is present in Appendix B:



Figure 2.2: Bendito Burrito (Source: Glovo, 2022c)



Figure 2.3: Scandal Burgers (Source: Glovo, 2022d)

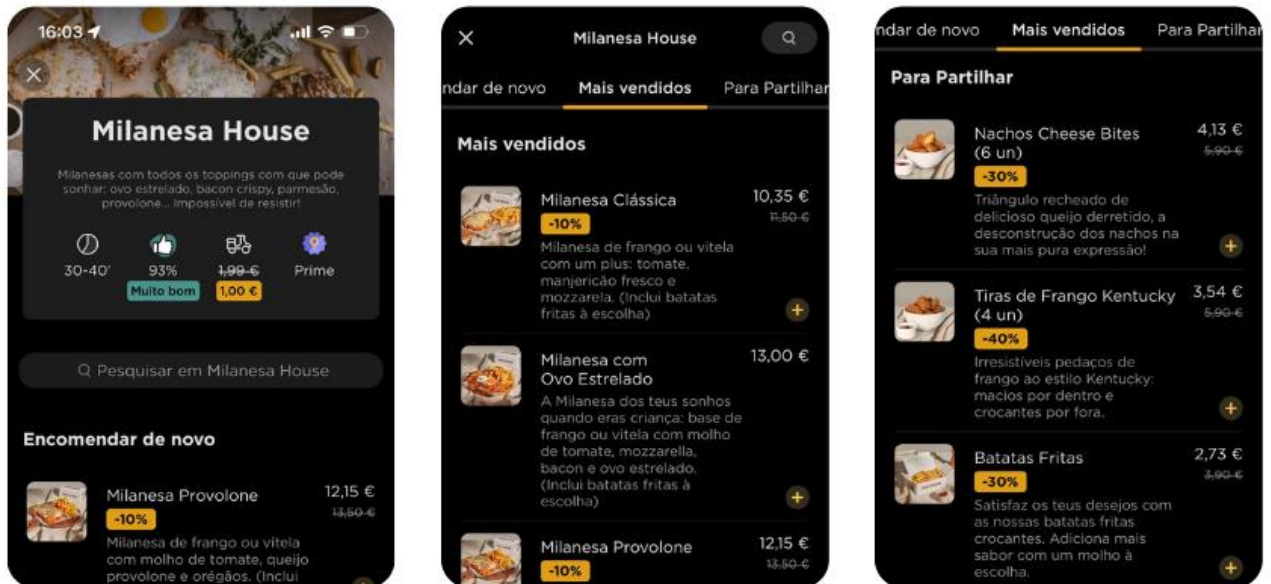


Figure 2.4: "Milanesa House" Store (Source: Glovo, 2022a)

Furthermore, at the beginning of November 2022, the Glovo Concepts project will move from Food Innovation to the Strategy vertical. This means that the venture is in a stage where it is becoming relevant for the company, and therefore needs to be considered under the strategy umbrella, so as to sustainably grow.

### **3. Quantitative Research Methodology**

The literature review already addressed the theoretical background of m-commerce, and e-commerce, and positioned it in the market of subject matter, therefore, this chapter intends to help respond to the main questions of our research, elaborating on how it will be done.

For the purpose of choosing the target sample, the selection was made through Looker, a business intelligence software and big data analytics platform that explores, analyses and provides real-time business analytics. This is an instrument that all Glovo employees have access to, and therefore the researcher, as it is internal to the company, retrieved the meant data, partners and respective e-mails, from an assortment of specific criteria mentioned in the “Sample Design and Data Collection” subsection.

Therefore, data were gathered through Qualtrics, using a quantitative method survey (Saunders, Lewis, & Thornhill, 2009), employing also open answer questions, with the aim of comprehending what is the numeric business panorama of restaurants that work with food delivering platforms, its difficulties and challenges, advantages, satisfaction level and importance of said applications for the whole operation. The quantitative method was utilized since it poses the best method to answer the research questions. Gathering primary data through a survey, and analysing its answers, provides more concrete information for management, that can be communicated through digits and statistics, showing a clear understanding of the intended goal.

Finally, the time horizon is established as cross-sectional, having the research been applied in a specific temporal space.

#### **3.1. Scales and Measurements**

To understand how the multi-app model can be beneficial for Glovo, data was collected through a survey that will be described in this subsection. The questionnaire was divided into five groups of mandatory responses, apart from the last question, a comment section: Introduction, Demographic Characteristics, Restaurant Characteristics, Delivery Service, and Delivery Platforms. It was written in Portuguese to address its main audience’s native language. The questionnaire is present in Appendix A.

The introduction is the presentation of the study and what it plans to discover. The following section, demographic characteristics, uses a nominal scale to realize the main age group, gender, and level of education of the representative population. Next, restaurant characteristics likewise utilize a nominal scale to find the illustrative restaurant typology, the company's dimension, localization and main sort of client, and the position of the person answering.

The delivery service category employs nominal, ordinal, and ratio scales, where the Likert seven-point scale and ten-point ordinal scale are applied. It expects to study the delivery service usage before and after the pandemic, its differences and expectations, its importance for the business as a whole, and the data treatment that is made for improvement.

Finally, the delivery platform's part applies the nominal scale, in contemplation of the concrete companies that are most present in the Portuguese context, the difference in the volume of business in each one, and the main preferences and challenges in working with them, accompanied by an optional comment section.

### **3.2. Sample Design and Data Collection**

The target population of this research is restaurants that work with one or more food delivery platforms, being that big chains (like McDonald's, Burger King, and Pans) and Q-commerce (Quick-commerce - goods such as electronics and pharmacy supplies) partners are excluded, to not influence the main aimed partners of the object of study (long-tail partners, as formerly mentioned in the literature review). The respondents are responsible for managing this side of the business, which can include managers, owners, communication directors, commercial directors, head-head chefs, and financial directors, among others, of all age groups (expectedly above 18 years old). Additionally, this inquiry was only sent to restaurants, already partners of Glovo, that are located in the region of Lisbon and Oporto.

Given the economic and time constraints, a subgroup of the previous object population is referred to as the target sample (Malhotra & Birks, 2007). This will be obtained through a non-probabilistic sampling by convenience technique, considering the accessibility and time in obtaining the elements. Taking into account the used method, this sample is not representative of the population, thus being susceptible to bias (Malhotra & Birks, 2007).



Furthermore, to reach conclusions, an online survey was developed through Qualtrics and distributed via e-mail to a selected number of restaurants, from the 20<sup>th</sup> of September until the 10<sup>th</sup> of October, counting a total of 145 answers, 90 of which were considered valid responses.

### **3.3. Methods for statistical data analysis**

Due to the quantitative nature of the data, the data treatment and analysis will be performed using the IBM SPSS Statistics 26 software, and Google Sheets. Along with the analysis, the characterization of the sample was done by employing descriptive statistics. In an effort to reach conclusions, techniques like frequency, average, standard deviation, and variance will support the assessment to achieve the goal of this project.



## 4. Data analysis and Results Discussion

### 4.1. Sample Characterization

The sample of this study consists of 90 valid respondents, being that it comprises mostly males (59.3%), situated between the age of 41 and 50 years old (28.6%), despite the gaps between 21-30 (27.5%) and 31-40 (26.4%) displaying similar distribution, with a bachelor's degree level of education (45.1%). In the table below, all the frequencies of demographic characteristics are displayed:

Table 4.1: Demographic characterization of the sample

Characteristics	Frequency (N)	Percentage (%)
<b>Age</b>		
<21	0	0
21-30	25	27,5
31-40	24	26,4
41-50	26	28,3
51-60	11	12,1
>60	5	5,5
<b>Gender</b>		
Female	37	40,7
Male	54	59,3
Other	0	0
<b>School Level</b>		
Primary School	1	1,1
Basic Education	6	6,6
High School	26	28,6
Bachelor's Degree	41	45,1
<b>Degree</b>		
Master's degree	17	18,7
PhD	0	0

Describing now the corresponding restaurants of the respondents, it is noticeable that this sample is mostly represented by “traditional Portuguese food”, with 23.1%, and “International (Italian, Chinese, Indian, Mexican)”, counting 22% of the total, followed not so far behind by “Coffee Shop/ Snack bar”, with 16.5%. The rest of the category’s distributions can be seen in the graph underneath.

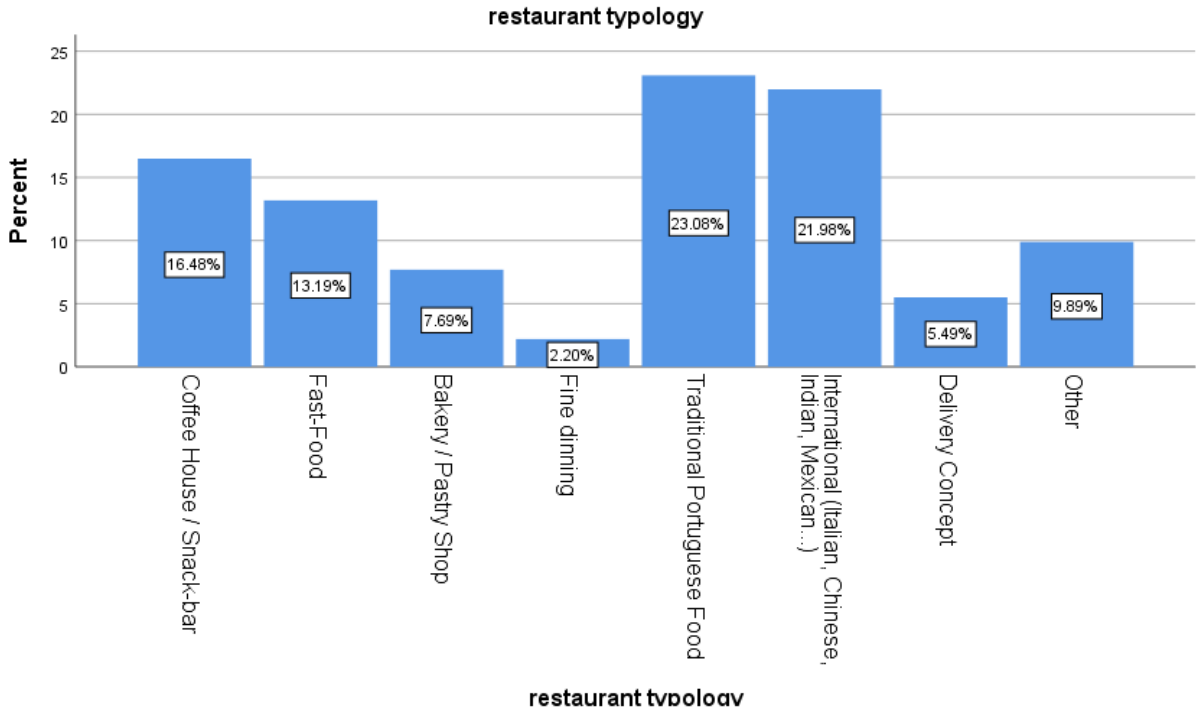


Figure 4.2: Restaurant Typology Distribution

Regarding the company size, it is observed that micro and small companies are the most common answers, adding up 46.2 % and 41.8%, respectively. Additionally, the majority of the restaurants are located in Oporto (59.5%), the remaining in Lisbon. Furthermore, people were inquired about their position in the company, being that “owner” is the most frequent observation (53.8%). With regard to the companies’ main type of client, it is reflected that the majority of businesses aim for “residents” (26.2%), “families” (22.5%), and “workers” (18.2%), which is in accordance with the sample’s type of restaurants.

## 4.2. Delivery Service and Platforms

Moving on to the next block, it can be seen that 60.4% of restaurants already worked with at least one online food delivery company, before the covid-19 pandemic. Consequently, it was asked for them to write the platforms that they were already working, to understand which players were on top of mind before the complete change in the sector. In the bar chart below, it can be realized that this aspect didn't change much. Uber appears as the primary chosen company they partnered with, counting a total of 36%, right after is Glovo, with 32%, in third appears Bolt (16%), and lastly, Takeaway.com, which is currently out of the Portuguese market, with 6%.

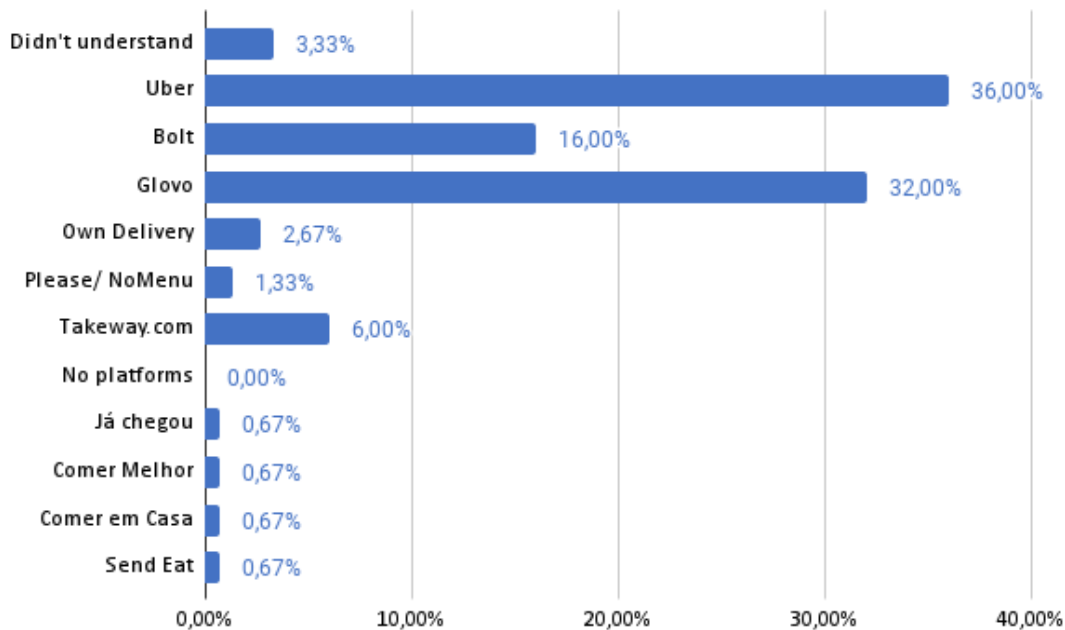


Figure 4.3: Platforms before covid-19

After the pandemic, 67.3% surely affirm that are going to continue working with the online platforms, choosing 7 on a Likert scale from 1 to 7. About the present day, the majority of the sample (25.3%) asserts that, on a scale from 1 to 10, have a satisfaction level of 7, therefore representing “very satisfied”, being that 8 is the following most seen answer, with 20.9%.

Then, representatives responded on to how significant the delivery fraction was to their business, having the study revealed that very, with a most repeated value of 7 (18.7%), afterward 5 (15.4%) and also significant, 8 (14.3%). Being 5 the neutral value on the scale, respondents

situated the importance level mostly from this value, up to “essential”. However, despite being relevant, food delivery apps mainly (61.5%) only represent from 0 to 20% of the invoice value of the company as a whole. The opposite side of the scale, from 75-100%, which is usually represented by restaurants with a delivery-only model, just shows a frequency of 7.7%. Moreover, the invoicing note is a pertinent aspect to investigate when working in this field, which is confirmed by 73.6% of the sample, contesting that the online sales reports are analysed. The statement’s final value is the greatest investigated aspect (77.6%), soon after is “number of orders” (68.7%) and then “new/frequent customer” (64.2%).

Regarding which platforms the restaurants mostly work with, Glovo is the leader, with 97.8%, soon afterwards is Uber Eats (84.6%), and in third is Bolt Food (60.4%). Which means that from Glovo partners, 84.6% also work with Uber, and 60.4% as well work with Bolt; being that the missing percentage of Glovo’s statistic can be churn (no longer operating with Glovo).

Partners were later asked to describe, in an open text question, what is the usual volume of business with each of the online delivery companies they work with, for instance: “Uber-20, Glovo-20, Bolt-20”. Here, every single one of the valid 52 answers, was analysed in a sense to understand the proportional difference between the number of orders and ultimately market space occupied by players. In the graph below, it is noticeable that the blue colour, representing Uber Eats, is the predominant one, dominating about half of the space in the market. Then, orange is the following perceptible shade, symbolizing Glovo, which shows some level of competitiveness between the two, but with Uber Eats emerging as the leader, as predicted by the market ranking mentioned in the literature review. Next, it is seen Bolt, in grey. These are the three major performers in the sample, which displays a high level of agreement with the reality of the delivery scenery in Portugal.

## Business Volume Distribution

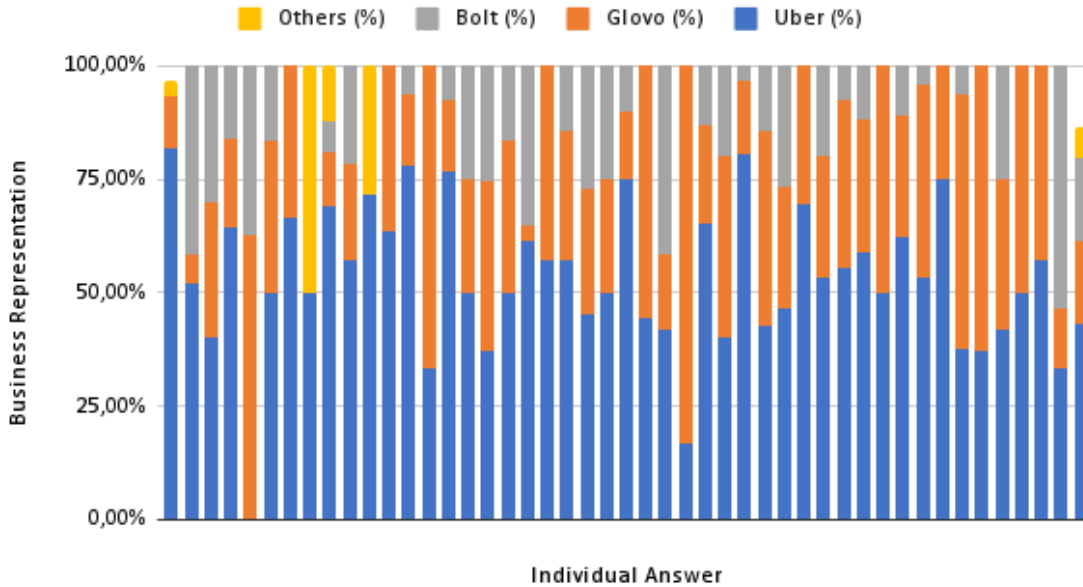


Figure 4.4: Business Volume Distribution

In order to recognize the actual percentages that partners attributed to the current volume of business, an analysis was made, considering each response in numeric value, transforming it to a percentage, and finally having the chance to perform an average of responses per player mentioned. Results are disclosed in figure 4, below, indicating that Uber Eats is the market leader, counting with 50.10% of the orders generated, soon afterwards Glovo, having a total of 29.05%, and Bolt Food with 19.23%. The rest of the companies are also present in the chart but have an insignificant value. This graph is indicative that the customer still mostly chooses Uber Eats as the preferred application to order, and that Bolt Food has some relevance in the market.

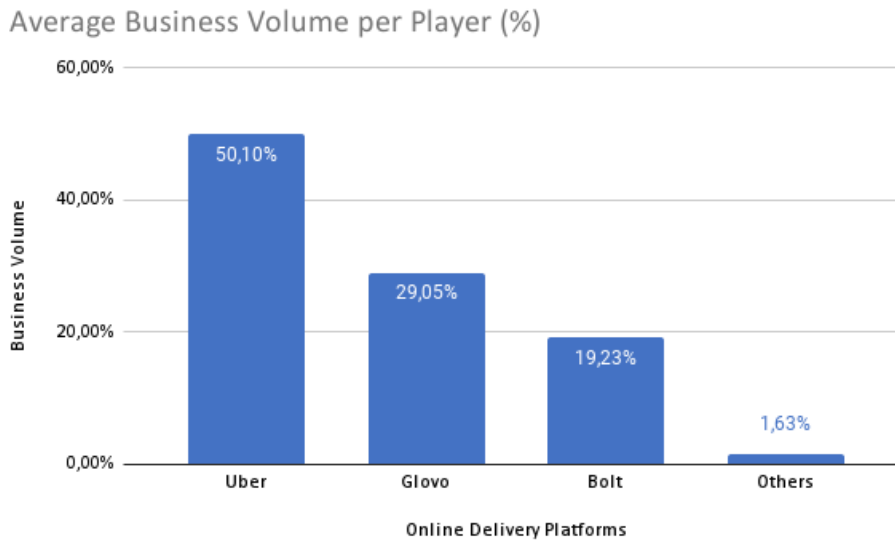


Figure 4.5: Average Business Volume per Player (%)

For Glovo Concepts and taking into consideration only the previously mentioned alternative companies, this means that there is at least 69.33% of the market left to explore since it is only operated through Glovo. Ultimately, this could mean a proportional augment in the volume of orders sold, which would impact the visibility, trust and loyalty of the brand(s), level of happiness and satisfaction of operators (partners operating the franchise brands), due to more rotativity of business, and at a fundamental level, revenue.

A determinant factor of good results when working the online business is the strategy used in terms of menu display and organization, pricing, promotional campaigns, and so on, being that the widely held answer, when asked if similar strategies are utilized across platforms, “yes”, given by 81.3%. From the people answering “no”, 5 out of 12 (41.7%), recognize a different value in each company, whether in terms of clients within the platform, ability to co-finance promotions (which involves fewer costs for the partner), or even its importance in the market. Related to this, is the average order value, which is the amount of money the client usually uses when consuming the brand. 79.1% of polled affirm having an analogous sum across platforms, which is in agreement with most restaurants using similar strategies in all of them.

Respondents that answered “no” to the former question were indicated to a following one, requesting an indicative average order value for each of the companies they mentioned working



with. There were two partners claiming that Glovo incentivizes a higher order value, ten non-valid answers, and seven deemed acceptable. The seven later cited, are scrutinised in figure 5.

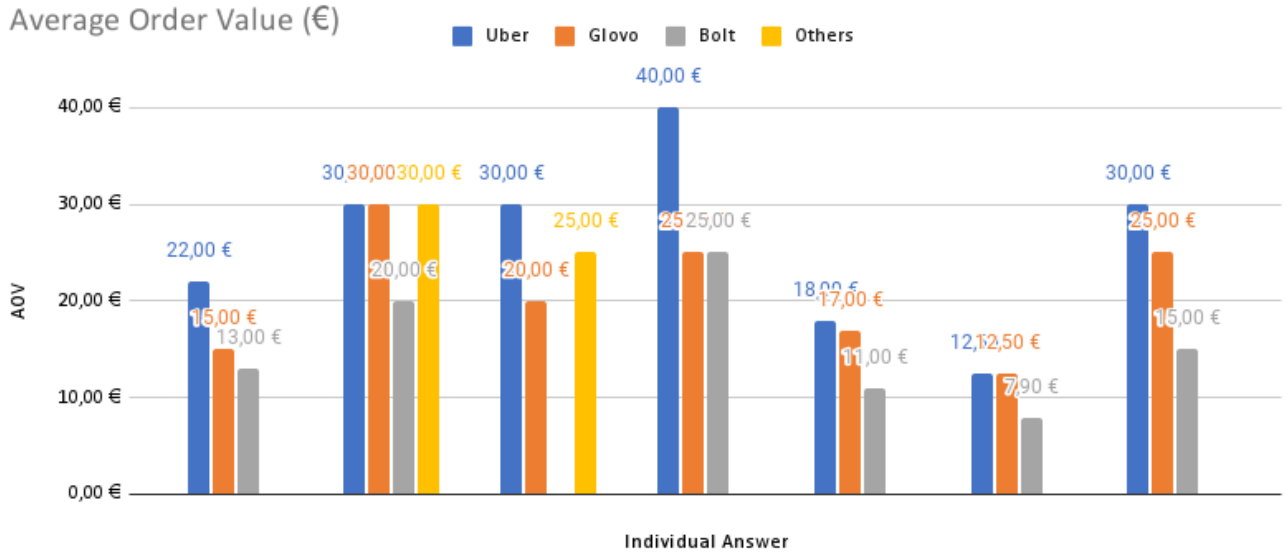


Figure 4.6: Average Order Value (AOV) (€)

Once again, Uber Eats, portrayed in blue, is the one that stands out, always being situated at the same level or above the rest. This means that the Uber Eats’ client usually spends more when ordering food, than with the rest of the applications, exposing consequently, a pattern of a higher purchasing power. Glovo is generally in the middle, closest to Uber, and Bolt Food appears as with a lower expenditure number. A practice much used now to drive higher spending from the client is the minimum order value, typically situated around the six euros mark, not only with the intent to increase AOV, but also to justify the courier making such a trip and still generating a significant contribution margin for the company. Sometimes, with a small order, profitability doesn’t cover the cost of paying for the service of the courier. If this price is not reached, a fee is employed, positioned between 1 and 3€. However, of the three firms, Uber is the only one that doesn’t apply this strategy. They instead have a service fee that symbolizes 10% of the total order value, no matter its total, and can go from 0,99€ to 2,99€, which in the end, means the same or higher payment for the client, but in a different form.

Therefore, analysing these results, we can see that Uber, as the first company to enter the market, has loyal and repeat customers, that doesn’t leave the app in search of a lower price, since

the minimum order value is not a strategy verified in this app. Additionally, the reality checks out with the fact that Bolt portrays a low AOV. It is a relatively new name in the sector, hence needs to capture other platforms' clients, and the major tactic they use is through promotions and low delivery fees, so in the end, less cost for the customer. This has been triggering a promotional war between the main players in the market for the last year, which is making the apps think outside of the box in searching for new ways to gain loyal customers, like signing exclusive and strategic partnerships with important places, displaying advertising through commercials, billboards, social media, and others.

Nevertheless, this higher purchasing power from the Uber Eats' clientele, can mean an increase in AOV for Glovo Concepts sales, and in the long run, in revenue and profitability. With the intention of realizing its potential numeric increase, an exercise was conducted calculating the difference between the individual answers that mentioned Uber Eats and Glovo. In the end, Uber Eats represents a higher average order value of about 5,43€ when compared with Glovo. Other than that, Glovo Concepts is passing through a pricing issue. It is being hard to maintain a competitive price when compared with the main contenders in the countries it is present in, due to a supply chain block. By working with Havi Logistics, a big corporation, working with volumes of business, contrary to this one, Glovo holds little flexibility to negotiate costs of orders, minimum quantities demanded, etc. Hence, since Uber has a higher AOV, a higher price like the ones practiced by the concepts of Glovo would hold and sell the same.

The same task was done to assess what would be the consequences, in terms of invoicing, if Glovo Concepts expands for Bolt Food, which showed a lower AOV. Curiously, once calculated, Bolt Food represents a negative difference of 5,43€ to the average of Glovo's, the same sum of money increased by working with Uber Eats. This can partially be explained by the fact that Bolt Food pertains the smallest fee when not reaching a certain amount. Bolt uses 6€, Glovo usually 8€, and Uber Eats the earlier mentioned service fee.

When considering the benefits that Glovo would generate by going multi-app, it is considered the 5% royalties calculated over the sales made in the other platforms, and the rapps generated through a more intense ordering of raw materials by the partners operating the brands, since more sales channels, mean inherently more sales, so more product use. Therefore, exploring the Uber market, could easily mean an increase in revenue. From everything scrutinized until now,

we assessed that Uber possesses the biggest market space, and loyal customers with high purchasing power, so all that is left to find is if the partners actually have a good relationship with the company.

That is why respondents were inquired about their favourite company to work with and why. Firstly, it is observed, in figure 11, that Uber Eats is the obvious leader when it comes to partners' preferences, followed by Glovo with 22.6%, and Bolt adding 5.4%. The 12.9% are represented by non-valid responses, no preference between players, and mentioning of other platforms.

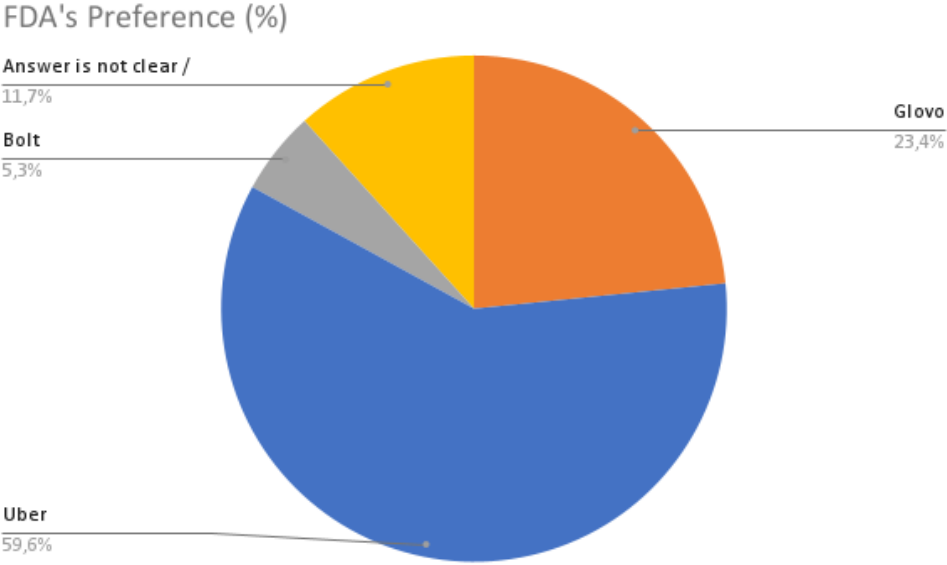


Figure 4.72: FDA's Preference (%)

In an attempt to examine every open-text answer, replies were grouped into seven categories: Invoicing Management/ Costs; Support (Customer and Partner) / Autonomy; Interface / Software (Intuitive); Radius Range/ Fast Delivery; First-player Advantage; Business Volume; Other. The first addresses topics like the commissions paid to corporations to enjoy the service, spacing of dates on which payment is made (weekly, bi-weekly...) and to which level are they sure to receive them (brand trust), the almost mandatory necessity to invest in marketing (promotions, positioning) or the possibility of the company co-finance campaigns. The "Support" category means the assistance that either the partner or the customer receives. This in a sense of it

being easy, accessible (resolution of problems), fair, helpful in understanding how the brand should perform in the app (menu design, campaigns suggestion), and also in it not being needed, so the partner having the autonomy to perform changes to the working schedule, menu, prices, etc. “Interface/Software (Intuitive)” groups people that think the application is easy to work with and intuitive. Next, “Radius Range/ Fast Delivery” means the reach the partner can have in terms of geographical area (usually synonymous with more potential orders), and fast delivery, associated with a better-quality product when reaching the final destiny (generally if this is not the case, name and recognition of the restaurant are affected). Furthermore, “First-player Advantage” comes as an answer inadvertently related to Uber Eats, the initial business to enter the Portuguese market. Second to last, “Business Volume” indicates the volume of orders. And finally, “Other” contains only four reactions, in the form of three reasons, which are “more dynamic”, “more attractive”, and “more content options”.

It is seen in figure 12 that the most prominent answer was “support”, with a total of 29.82% of the sample mentioning it, subsequently comes “Invoicing Management/ Costs”, adding up to 22.81%, then “Interface/Software (Intuitive)”, with 19.3%, later is “Business Volume” (15.52%), and “Radius Range / Fast Delivery” (12.28%). These were the greatest remarkable classifications, but the remaining are also displayed below.

FDA's Preference Reasons

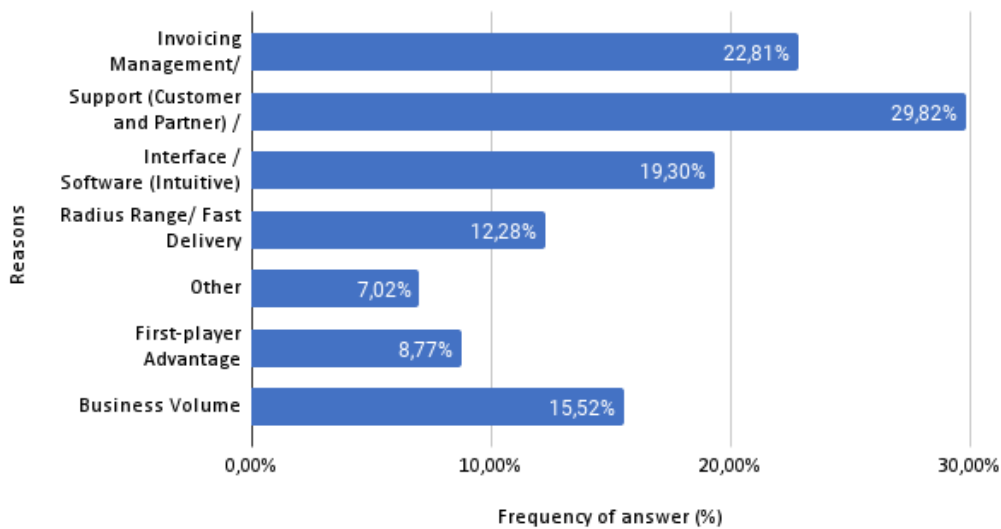


Figure 4.8: FDA's Preference Reasons

Interpreting these results, partners' needs have to do firstly and mainly, with the facility to access information, reach people within the company to solve problems, fair treatment when dealing with the client, and autonomy in managing their brand in the app (preparation time, working hours...). A second and somewhat urgent matter is lowering the costs of working with the delivery platforms. Partners feel the usual commission, 30%, is very high, which compromises their profit in the end. It also impacts the customers' perception of the product price and accustoms them to only buy when a promotional campaign is in order, thus damaging the volume of orders and invoicing value.

Moreover, it is important for the interface to be intuitive to work with, hence relevant for companies to invest in technology that allows the application to be constantly updated and reinvented. Additionally, of course "Business Volume" is one of the prevailing key performance indicators, and a crucial move here is to offer the service of an account manager, that understands the business and the necessities of the partner and has the function of increasing its number of orders through a various number of marketing strategies like menu design, positioning in the app, participation in certain promotional campaigns, among others. Last of all, "Radius Range / Fast Delivery" can be worked through devoting efforts towards a great operations team, in charge of having the smallest average delivery time and managing the radius each partner can reach, according to its categorization.

Since Uber Eats has been proven to be Glovo's main competitor, it is pertinent to study what is the opinion of partners about it and why are they preferring to work with them, in order to see the motives as points of improvement. Consequently, a more detailed assessment of the prior question was done, considering only comments mentioning "Uber" and reasoning. In the graph below, it is salient that "Support (customer and partner) /Autonomy", with 31.11%, is the primary argument; before long is "Business Volume", embodied by 22.22% of the sample; after that "Interface/ Software (Intuitive)" (15.56%), and "Invoicing management/ Costs" (13.33%).

## Uber Eats' Preference Reasons

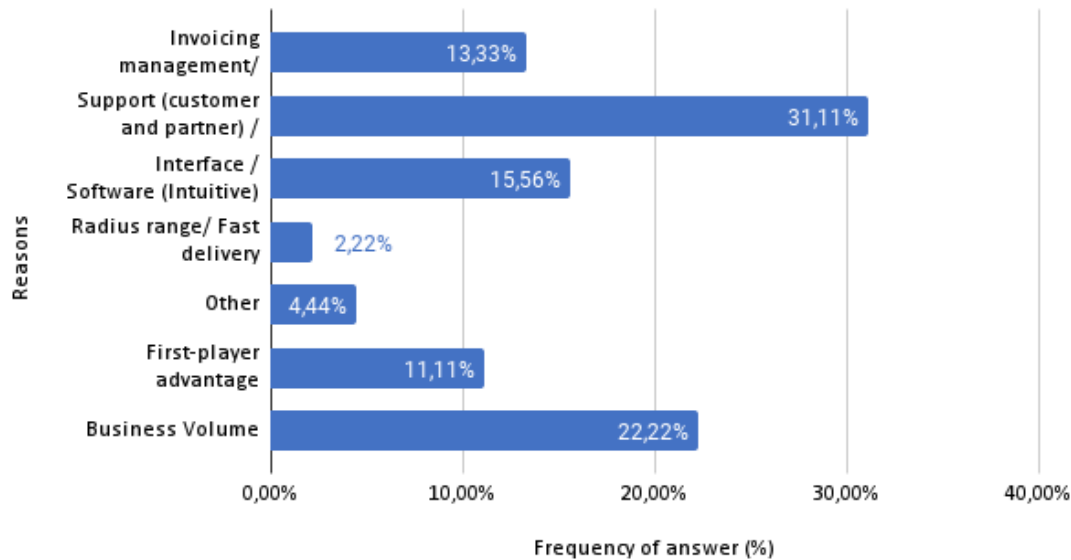


Figure 4.93: Uber Eats' Preference Reasons

Ergo, Glovo should mainly work on improving the customer and partners' support, as well as the autonomy the partner has in managing its own account. It was mentioned that Glovo sometimes reimburses the client when there is a complaint, disregarding the restaurant. Additionally, Uber was a pioneer in giving the business manager, responsible for the account, full access to make changes to every detail surrounding the restaurant's page and way of functioning, which to this day is on top of mind. Glovo has only done this very recently with the tool of the manager portal. And finally, they claim Uber is easy to reach, so problem-solving works smoothly, data which Glovo should also take into account. It ought to enhance partner support, by having a dedicated department for each category of restaurants, thus expanding it likewise to long-tail.

Similarly, "Business Volume" is related to a number of different aspects, such as marketing and pricing strategy, which can be a service supplied by the company, being a top-of-mind brand, Uber's case, among others. Here Glovo can work its diffusion of awareness to create a higher sense of brand recognition, trust, and others, which can be done through promotional advertising, influencer marketing, outdoor billboards, and so on. Combined with an enrichment of its partner support in understanding the delivery business management. Afterwards, the interface is something that requires a good IT department, aligned with an understanding of the client's needs.

So, together with the marketing department, through a survey, for instance, they can realize what is missing in its software, what can be bettered, and make it more intuitive. At last, the payment dates are something relevant for the restaurant since they are providing a service and not receiving the money for it right away. In Glovo, the payment is every fifteen days, though, payment methods also include cash, which the partner will receive from the courier, in the instant it delivers the food. Whereas Uber does a weekly payment. However, the partner's perception of a weekly payment is usually that it is easier for their revenue management, results analysis, and accounting. So, this could be something that Glovo considers changing.

Moreover, after knowing what the main advantages of working with platforms are and what restaurants look for in this type of partnership, it is time to discover the major challenges. After gathering all responses into seven categories, frequencies were performed to understand the most common. Polled largely focused on: Costs (commission); Support/ Communication; Competition/ More orders; Management (platforms, within own restaurant, pricing/ marketing strategy); Couriers; Other and the rest are Not valid/ None.

The category of costs usually mentions the high fees they pay to platforms, about 30%, even higher with the taxes (can go up to 37%, which some partners are not aware that it can be deducted, so signifies a greater cost than it should be), and the promotions they have to make to attract clients, which subtract from their profit, or the challenging manner it is to get companies to co-finance these promotions. "Support/ Communication" is all about the difficulty to reach people inside the company for problem-solving, and the lack of autonomy for brand management. This then leads to difficulties in altering menus, preparation times, etc, because there's no easy connection with the account managers and partner support, allied with a small portion of people revealing complications with the contact between them and clients and couriers. The classification of "Competition/ More Orders" has to do with the existing content competition inside of a delivery application, which makes the visibility of the restaurant hard, and the knowledge of strategies in order to capture more orders and generate more business.

Next, "Management" includes several aspects like overseeing all the work in the kitchen, that includes not only various platforms, but also the in-person service (there are times platforms must be shut down to hold a good service in the room), and the guarantee that all products are sent correctly, to avoid complaints, in time for the courier to not wait, which also poses a challenge.

Besides marketing and pricing strategies are a necessity to survive in the delivery environment, which requires knowledge. Additionally, couriers are a liability for the service of the restaurant, including the uncertainty of what happens from the moment the order leaves the restaurant until it reaches the client; the time they must wait for them, leaving the product in different conditions than the ideal; and the tough communication channel they hold with them. Then, “Other” includes answers that didn’t fit in the priorly stated categories, such as the delivery service being of little importance to the business, so only having it as an extra, or getting used to the system. Finally, “Not valid/ None” are dismissed replies and people that don’t see any challenges in working with companies like this.

So as to study the distribution of these variables, a bar chart was designed to read the results, which can be observed below. The most relevant problem that partners have with working with platforms is clearly the commissions paid (33.3%). This has consequences in the retail selling price, affecting the customer's perception of the price of the product, having the possibility to impact sales. Also, as they have to increase the costs of sales to the customer by about 30% (to compensate for the commission paid), promotions are a frequent strategy used in all platforms, which are mostly paid by the partner. This makes the client "addicted" to buying only products with promotions and a challenge to the partner in terms of sacrificing their own revenue since most platforms don't finance these types of initiatives.

Another topic heavily mentioned is couriers. About 16.1% of partners reveal to struggle when communicating with them since some are not Portuguese, so don't speak the language, and sometimes don't even understand English, the universal language. Additionally, the waiting time, for them to arrive, can be long, compromising the quality of the food, and consequently, the review/ perception of the restaurant itself. Furthermore, the management of some aspects is mentioned by 14.9% of the sample, namely the handling of orders within the restaurant, and with other platforms; as well as managing which strategy to use in each platform (since they all have different clientele and ways of working). A final and still relevant point to consider is the support and communication between all parts of the business (restaurant, client, courier and company), that shows 11.5% of mentions.



### FDA's Partners' Main Challenges

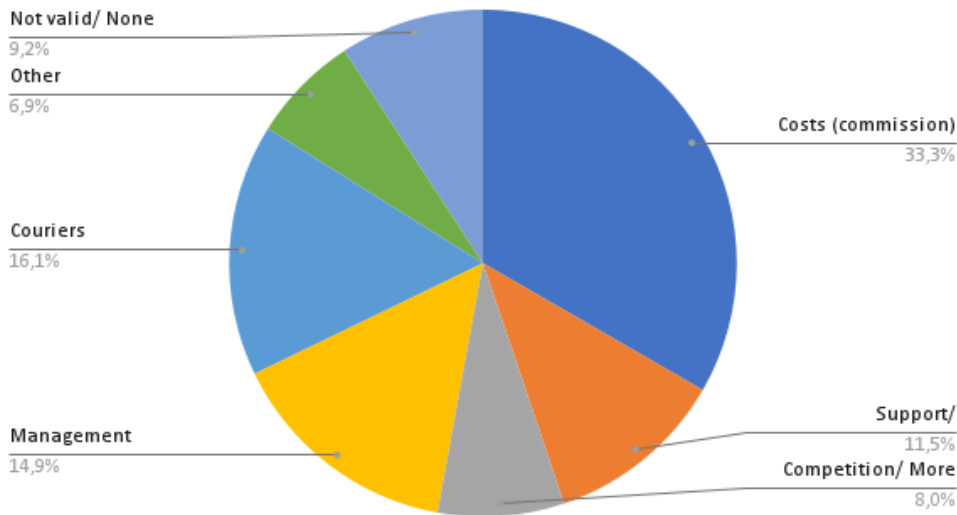


Figure 4.10: Partners Main Challenges in working with FDA's

Taking into consideration these main four explanations, online platforms should consider offering a different scheme of commissioning, a better communication channel and assurance of trustworthiness in the couriers, a playbook sharing some know-how on managing at least their own brand in the application, and a better and clearer working line of partner support. In Spain, a rider law was developed, obliging online platforms to employ couriers, which in turn offers a different sense of trustworthiness to the partner allied with the online delivery company.

For Glovo Concepts, this is relevant to see in which characteristics it should differentiate its service. Since it is a franchisee type of business and includes a royalty fee, the service charge should be lesser than the regular Glovo one, to incentivize partners to join. Therefore, the sum between service fee and royalties should be lesser than 30%. Here it should be suggested a commission of 23%, plus the 5% franchisee emolument, summing a total of 27%. Furthermore, it should provide an operations management that tracked every own brand order, in order to make sure everything goes accordingly with the courier delivery; or even consider having its own couriers, exclusive for the Concepts' partners. For the management issue, several facilities should be provided, namely, the training chefs should recommend a stock management sheet, to ease day-to-day product planning and timings to make new orders to the supplier. Besides, on the training day (the day that the chef goes physically to the partner's location to teach their staff to work and

conserve the product) should be left a clear assembly line for the final product to be ready in the least amount of time possible, for it to be distributed in pristine conditions and do not mess with the service of their own restaurant (making the management between orders easier). Lastly, support should be given through the form of the account manager and the training chef, by making every operation step easy and understandable for the partner, supplying thus, in an implicit manner, the expertise for managing their own restaurant, in the same way, improving results and performance in the online delivery scene.

Regarding the final comment section, it received a total of twelve remarks, being that they are all different, thus they will not be analysed as to not have enough expression to make any conclusions.

Additionally, there are two other tests that would be beneficial for this study, but data does not show a lot of partners working with Uber Eats, and not with Glovo (two), and the contrary case, working with Glovo, and not with Uber (although more significative, counting a total of fourteen). It would be beneficial to understand if the main challenges differ among these two platforms, to notice points of improvement for Glovo, and also the representativity that partners attribute to the delivery part of the business, to give more importance to those partners. However, there is no manner to compare the two companies with only two answers being from just working with Uber. Nevertheless, when assessing which companies represent between 50 and 100% (both the 50-74%, and 75-100% categories) to the whole business, Uber Eats and Glovo are present in all the replies.

## 5. Project Implementation

Summarising the main goal of this project, is to turn Glovo Concepts into a multi-app model, instead of it functioning only through Glovo, so the following objectives must be fulfilled:

- Inform the current Glovo Concepts' partners that the strategy will be focused on expanding to other online food delivery platforms;
- The current partners will reach the other platforms in order to establish new partnerships, signing and activating, what will be claimed as, their own virtual brands;
- The team will assist with menu designs, photos, descriptions and prices;
- The new leads contacted will already be aware of this possibility from the start, in the sales pitch, so as to, on the activation date, be ready to be present in all desired platforms;
- Accompany the partner throughout every stage, and track every growth metric (e.g. number of orders, GMV, etc.).

For the implementation of this project, several parties must be involved, namely:

- Local Team:
  - **Account Management:** the prior form of contact for the partners is responsible for offering them the chance of going multi-app, giving all the guidance and guidelines to follow, and providing every material needed (e.g., menu items, photos, price, etc.). Besides, later, when the project is implemented, it will ask for sales reports from other platforms.
  - **Operations Excellence:** the training chefs will be in charge of guaranteeing the partner has enough space and ability to receive and well perform the extra service it will be obtaining, coordinating new and adapted stock management practices, and timings to order materials from the supplier.
  - **Sales:** seeing that this new model will be added as a possibility to the initial contract, the sales team will be responsible for communicating this effectively to the partner and making sure the contract is sent accordingly to the partners' desires. As well, it should develop a sales pitch, not only for new contacts, but as well for current partners, providing it to the account management team as an efficient tool to follow.

- **Finance Department** (headquarters): since orders will not come directly to Glovo, finance will have to adapt the invoicing based on the partners' sales reports, given to the account manager (to charge the royalty fee).
- **Legal Department** (headquarters): Given that the original contract, signed by Glovo Concepts partners, has a statement claiming the franchisee brands' exclusivity for Glovo, an addendum must be written to render an exception to this clause.
- **Operations Department** (headquarters): This division will be the one coordinating every action of all departments, making sure everyone is in synch, thereby later expanding it as a similar model for all countries operating Glovo Concepts.

In terms of risk assessment, there are some concerns to look out for. This process will be mostly based on the relationship of trust between Glovo and the partner. Due to law restrictions, namely the anti-trust law, Glovo cannot speak directly to other companies, so all the negotiation process will be led by the partner. The anti-trust law is defined as unlawful business practices in general terms, where each company needs to act independently from the other, and so promoting that fair competition occurs, in favour of consumers, in an open-market environment (European Commission, 2022). Moreover, this negation will only occur, if the partner is willing to expand the business to other platforms, which can be prevented by a good sales pitch and argumentative speech.

Furthermore, the sales process is not free of faults, therefore, does not guarantee to find the right and faithful partnership for the franchise brands. Therefore, a trial period operating only in Glovo is advised. From the researcher experience as a professional in the department, 3 to 6 months are enough to extrapolate if the partnership is healthy and profitable for all parts. Ultimately, an experimental period of 3 to 4 months, analysed through each case, is recommended.

Additionally, the sales reports will be provided by the partners, which means they can or not be accurate. However, as Glovo has access to the ordering of raw materials to Havi Logistics, it can develop a model to predict, based on the stored product, how many sales are viable to be made. Another thing is that Glovo will not be able to access some metrics it usually analyses within the company, such as bad ratings (bad classifications of the product or service, harming the brand reputation), delivery times, and cancellations, among others. However, a measure that can minimize this shortage of information is the text mining technique, in this case, of the other

platforms' reviews. This is, to turn unstructured text into a structured format, by analysing certain patterns, through an automatic process, in order to tell some points of improvement.

With regard to the resources needed, there will be no investment. So, all the extra sales made will revert into revenue, either through the royalties charged as a result of the increased orders in other platforms, or the rappels, collected by the extra product bought by the partner to Havi Logistics. The only materials that Glovo will need to provide, besides the already supplied support by the local team, is the adapted format of the menu, with the pictures fitting the other companies' requirements and measurements, and descriptions of the products.

Considering all the points stated above, I propose that this project starts its implementation in January, so as to not interfere with the holidays (Christmas, New Year, etc.), which is always one of the busiest seasons for restaurants, impacting thus the importance given to the delivery side of the business. However, because of unforeseen events, like team vacations during the holidays, and the inability to talk with partners due to the busiest time of the year, along with others, this model rollout may suffer some delays, displaying the beginning of operations, the latest, during the month of March. Nevertheless, the opposite case of it being anticipated is likely probable. Since the company lives through the "gas" value, which values fastness over perfection, all teams will work towards attaining the final goal, of starting operations with other platforms, in the short amount of time feasible. Hence, the following chronogram is suggested:

Table 5.1: Implementation Chronogram

<i>Month</i>	<b>December</b>				<b>January</b>				<b>February</b>			
<i>Week</i>	W49	W50	W51	W52	W1	W2	W3	W4	W5	W6	W7	W8
<b>Task</b>												
Inform all teams about the model rollout												
The Sales and Account Management team align in a coherent pitch												
Operations Excellence calculate new space necessities and other requirements												
Design of contract addendum												
Contrive the sales/ number of orders reporting sheets												
Creation of a standardized invoice system												
Meeting between the local team to gather all info												
Inform current partners												
New contacted leads reached by using the updated sales pitch												
Sending menu pieces of information to partners												
Negotiations with other platforms												
Beginning of operations												
Support and monitoring												
Results Analysis												
Improvement examination												

This implementation suggestion was verified and approved together with Alex Puig, Senior Business Analyst and trusted advisor of Quentin Vanbever (Associate Director), and Carlota Eserverri, Operations Senior Lead, both based in Glovo’s headquarters, and in charge of new projects in Glovo Concepts.

## **6. Conclusions**

The present chapter will present the main conclusions of this study, identify the most important contributions for the company, as well as the limitations and respective suggestions to overcome them.

### **6.1. Conclusions and Implications**

These days, and especially after the covid-19 pandemic, online retail brings the consumer a fast and convenient option to shop, making the industry one of the most fast-growing. Therefore, the habit of ordering food through an application is here to stay. In the sense of understanding the future of this type of m-commerce, a study was performed within the Glovoapp company, in the context of their food innovation project entitled Glovo Concepts.

Glovo Concepts entails a franchisee brand-type model, with its own brand portfolio, comprising the respective supply-chain logistics, and marketing and branding materials. Its main purpose is to leverage all Glovo's existing partners' capacity in terms of production (pieces of equipment, space, employees, etc.), and proposing them a shared-revenue collaboration through the selling of Glovo's own virtual brands, prepared in their restaurant, and delivered to the Glovo client. As benefits, they will receive all the know-how through two main points of contact. These are the account manager, in charge of problem-solving, and brand management in the app (marketing strategies to boost sales), and the operations excellent, a training chef responsible for teaching every product preparation, assembly, and storage steps. Both are responsible for mediating the relationship between the partner and the logistic supplier, in this case, Havi Logistics. In return for the opportunity to operate these simple and quick-to-make virtual brands, the restaurant is accountable for the acquiring, adequate storage, and preparation of the final product, receiving therefore a margin over the sales made.

So, as stated above, Glovo Concepts only operates through the Glovo app, therefore simply possessing one sales channel. This study proposes this to no longer be the case, expanding the business to other online food delivery platforms. And with this, the main question of this study is to understand if going multi-app is beneficial for Glovo Concepts, considering mostly the extra revenue and gross merchandising value that would arise from that. The results formerly revealed, permit us to answer the main questions of the study.

The first question intends to know what the extra volume of business is, in the form of orders, that going multi-app would bring for the project. As seen in the results analysis chapter, Uber Eats represents 50.10% of the business for Glovo's partners, whereas Bolt Food signifies 19.23%, and others 1.63%. Being that, nowadays, Glovo Concepts has an average of 500 orders a week, with the current partners open, this could represent an increase of 1221 weekly orders (Uber would bring an increase in the amount of 862 orders, Bolt 331, and others 28). Since the project is still in a growing stage, where weekly orders increase every week, this could be a lower number than the one to be expected by the time of the implementation of the project, where we anticipate seeing more partners operating, therefore a higher number of sales.

Secondly, we intend to know if there would be a gross merchandising value increase by the building of partnerships with other online food delivery applications. From the first question, we can assume that there will be a greater GMV since more sales generally equal a higher invoicing value. To further this question, we can look at the differences between the average order value in each platform, as stated in the prior chapter. It is assessed that Uber Eats has the highest purchasing power client, displaying a greater expenditure value per order in the amount of 5,43€, with loyal and repeat customers that do not look for promotions, since this is the most familiar brand to the market, revealing the first-move advantage. Whilst Bolt Food denotes the opposite case, showing a 5,43€ decrease in AOV, demonstrative of its target market, that is the client in search of the cheapest price. Bolt bets on attracting the customer through aggressive promotions such as 40-50% discounts on products and/or free delivery fees. Since the brand is relatively new to the Portuguese scenery, only having entered in October 2020, the main strategy used is the lower price in the marketplace, thus failing to build loyalty amongst clients.

In this sense, being that the Glovo Concepts brands' AOV is situated between 15-20€, by adhering to Uber it should be situated between 20-25€, and Bolt's among 10-15€. Hence, one order done through Uber Eats would bring more GMV than one of Glovo's. Of course, in terms of actual revenue, this would not necessarily represent a proportional raise in the final income, since Uber's sales would return the 5% royalties and the additional 5% rappel made from additional ordering of raw materials to the supplier, failing to collect the 28% commission fee.

Next, we want to uncover the advantages multi-app can bring for the partners, perhaps covering some of Glovo's pain points. It is clear that partners elect Uber as their favourite company



to work with, presenting a 36,2% difference to Glovo. So, there is a chance that some of Uber Eats' practices cover Glovo's difficulties. The primary advantages stated when asked the reason why they prefer a certain company, that showed a larger meaning were support (to the customer directly in the app, or to the partner), invoicing management and costs, business volume, and the intuitiveness of the app's interface. These were also the major preferences mentioned along Uber, which can mean these must be Glovo's improvement efforts.

Consequently, the support given to the long-tail partner in Glovo is always through the web app, connecting them to a line of support, for more day-to-day issues, and via e-mail for major problems, whereas Uber possesses an account manager assigned to these partners also. This facilitates communication, improves response time, and therefore overall satisfaction, which represents a major advantage for Glovo Concepts' partners in the form of constant support on all fronts. Additionally, invoice management is an important factor as well. While reimbursements done by Glovo are bi-weekly, other platforms usually pay every week. For the partner, this is a key plus in terms of managing the accounting and having liquidity for other purposes, namely the acquisition of raw materials from Havi Logistics. In the latter category still, costs are included, namely the service fee for working with the online delivery platforms. Since the partners will request the entering of new brands into other platforms, there is a capability of negotiating the said fee, possibly making it lesser than Glovo's, turning a bigger profit for operators. Then, business volume is already a subject addressed in the first question, concluding that it can bring extra. And finally, interface intuitiveness is essential for the perception of the ease of operating the app on a daily basis. Uber is the most mentioned app for having easy-to-work software, which represents a factor of satisfaction for the partner.

Ultimately, we wanted to realize the central challenges of implementing this project, so as to run strategies to overpass said difficulties. The major one will be the relationship of trust between the partner and Glovo since all the negotiation will be performed amongst the operator and the ulterior firms, and reports provided by the partners through a POS system. Here Glovo needs to first understand the partner's availability to expand to other platforms, through good communication, and determine every term explicitly, intending to assure the livelihood and continuance of the collaboration in Glovo also, not damaging it. Furthermore, a model must be developed to predict the number of orders, based on purchases made to the supplier, which Glovo

has access to, as a means to verify the accuracy of the report received. A second matter to consider should be the inability of analysing some metrics related to the sales in other platforms, such as bad ratings, cancellations, delivery times, etc., which can be mitigated using the technique of text mining, examining thus other platforms' reviews.

So, in the end, as a contribution to the company, we conclude that joining Uber Eats, in addition to Glovo, will be beneficial for the project. Uber is the number-one company in Portugal, hence displaying a greater number of customers, who are loyal and have a higher purchasing power. This will not only bring an extra number of sales, but also a different recognition, familiarity, and awareness of the brands. This, in turn, can also represent an increase in sales in the Glovo app as well, as there are some customers that look for a better price in a determined restaurant. We realise this can be the case because there is a superior probability that the brands will have discounts in Glovo, as the costs are shared between the partner and the company, whereas in Uber, they will be fully supported by the operator. This will ultimately bring more users to Glovo as a service as well, therefore benefiting the business as a whole.

As they have good support with Uber, issues with the menu, and preparation time, among others, can be easily solved, diminishing possible complications for Glovo's account manager. Besides, as partners will have an added channel to sell, more orders will be made, increasing the raw materials necessities, thus augmenting their ordering to Havi Logistics. This will improve not only the revenue made through rappels but also the relationship between Havi and Glovo. By having a further volume of purchases, the significance of Glovo in the business of Havi, grows, also boosting the flexibility of negotiation for better terms, which is nowadays one of the biggest issues of the project (supply chain). Some terms to be adjusted can be the price of products, lowering of the minimum order quantity, and payment conditions, resulting in an improved relationship with the partner as well.

## **6.2.Limitations and Recommendations**

In the present study, some limitations were found and given that they influence and conditionate the development, they will be explored. The first one holds itself to the use of non-probabilistic samples, due to the time restraint of the building of this investigation. This sample is not representative of the population and doesn't allow for a generalization. Furthermore, the drop-out

or non-completion of the survey, reflects another limitation, since it confines the sample to a smaller number. Moreover, being that only Glovo partners were reached to answer the questionnaire, causes the results to be biased. Additionally, the study was done through a quantitative method only, whereas the qualitative method could have brought a more in-depth perspective since it would have obtained more detailed information in the course of the interview approach. Likewise, the use of the text-mining technique in the clients' reviews of other platforms could expose some specific improvement points for Glovo Concepts. Finally, online food delivery platforms are a relatively recent subject of the researchers' investigations, so there is not extensive literature on the matter.

However, as this is a very relevant topic nowadays, and a constantly growing industry, it is interesting to understand its future. Therefore, a broader exploration into the delivery scene in Europe is advised, as is in Portugal, since Lisbon is considered to be one of the greatest start-up hub cities in Europe, either in number or potential. It is important to understand the customers' expectations and behaviours towards this online shopping form, as now the pandemic shifted said manners, in order to offer the best service to the targeted population.

Additionally, regarding the Glovo Concepts project, besides and similarly to the multi-app model, it would be interesting to discover the viability of an offline model or own tangible stores. This is the ability of franchisee partners to sell the brands in their own restaurant, in a separate menu, with all its branding materials, or the creation of physical shops displaying the brands for consumption. This would be a way to visually associate the virtual brand with a physical aspect, spreading furthermore the brand's recognition, awareness, and purchase behaviour. As well, would be an additional sales channel, permitting the partner to rotate stock in a faster manner and improve income and profitability, with less food waste, consequently moving more products across Havi Logistics, resulting in additional streams of revenue.

Furthermore, and lastly, as Glovo Portugal is betting on promoting the brand outside the app, in the form of television advertising, outdoors, and social media ads, Glovo Concepts' brands could enjoy this visibility as well. For the moment, its marketing strategies are focused within the app, with positioning the brands, promotions, and bubbles integration (specific categories), whereas it could also mix it with Instagram and YouTube ads, influencer marketing, and joining Glovo's promotional tools. These social media tools especially can be a good form of boosting

awareness since its main user's community is young people, and as mentioned in the literature review, young people of both genders are the most likely to adopt m-commerce. Not to mention that the majority of the brands portfolio are concepts of fast-food, usually directed also to younger people. However, a more insightful study into the personality of the consumers of Glovo Concepts' brands could help in understanding what are the best promotional tools to use.

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## **Appendix**

### **Appendix A- Survey**

#### **Plataformas de Delivery**

##### **Start of Block: Introduction**

Introdução O presente questionário, efetuado no âmbito de conclusão do Mestrado em Gestão, na ISCTE Business School, tem como principal intuito estudar o setor de delivery em Portugal, e suas respetivas adversidades e vantagens.

Peço a sua completa honestidade e abertura no preenchimento do mesmo, sendo que a sua identidade nunca será revelada.

Agradeço desde já o seu tempo e disponibilidade.

##### **End of Block: Introduction**

##### **Start of Block: Demographic Characteristics**

Q1 Assinale a sua idade.

- <21 (1)
- 21-30 (2)
- 31-40 (3)
- 41-50 (4)
- 51-60 (5)
- >60 (6)

Q2 Indique o seu género.

- Feminino (1)
- Masculino (2)

Outro (3)

Q3 Especifique o seu grau de escolaridade.

Ensino Primário (1)

Ensino Básico (2)

Ensino Secundário (3)

Licenciatura (4)

Mestrado (5)

Doutoramento (6)

**End of Block: Demographic Characteristics**

**Start of Block: Restaurant Characteristics**

Q4 Identifique a tipologia do seu restaurante

Café / Snack-bar (1)

Fast-Food (2)

Padaria / Pastelaria (3)

Fine dining (4)

Comida Tradicional Portuguesa (5)

Internacional (Italiano, Chinês, Indiano, Mexicano...) (6)

Cozinha de Fusão (7)

Restaurante de Hotel (8)

Conceito de Delivery (9)

Outro (10) \_\_\_\_\_

Q5 Selecione a categoria em que o seu restaurante se insere.

Micro-empresa (1)

Pequena empresa (2)

Média empresa (3)

Grande empresa (4)

Q30 Refira onde se localiza o seu espaço.

Lisboa (1)

Porto (2)

Q6 Defina a sua posição na empresa.

Gerente (1)

Proprietário (2)

Funcionário (3)

Chef principal (4)

Q7 Descreva o seu principal tipo de cliente (máx 2 opções)

Residentes (1)

Turistas (2)

Trabalhadores (3)

- Famílias (4)
- Jovens (5)
- >65 anos (6)
- Outro (7) \_\_\_\_\_

**End of Block: Restaurant Characteristics**

**Start of Block: Delivery Service**

Q8 Antes da pandemia do covid-19, trabalhava com alguma plataforma de delivery (entrega em casa)?

- Sim (1)
- Não (2)

*Display This Question:*

*If Antes da pandemia do covid-19, trabalhava com alguma plataforma de delivery (entrega em casa)? = Sim*

Q9 Se sim, quais?

---

*Display This Question:*

*If Antes da pandemia do covid-19, trabalhava com alguma plataforma de delivery (entrega em casa)? = Sim*

Q10 Numa escala de 0 a 7, indique se pretende continuar a utilizar as acima mencionadas aplicações.

0 1 2 3 4 5 6 7

Click to write Choice 1 ()



Q11 Assinale o quão satisfeito se encontra com as plataformas que trabalha atualmente.

- 0 (0)
- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 (10)

Q12 O quão significativas são as aplicações de delivery para o seu negócio?

- 0 (0)
- 1 (1)
- 2 (2)

- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 (10)

Q13 Geralmente, costuma analisar as suas vendas através deste canal?

- Sim (1)
- Não (2)

*Display This Question:*

*If Geralmente, costuma analisar as suas vendas através deste canal? = Sim*

Q14 Refira quais os aspetos mais relevantes para a sua análise (máx 3 opções).

- Número de pedidos (1)
- Valor de Faturação (2)
- Resultado de Campanhas Promocionais (comparativamente a períodos sem campanhas) (3)
- Novo cliente / Cliente Frequente (4)
- Outro (5) \_\_\_\_\_

Q15 Em termos de vendas/faturação, quanto representa o canal de delivery para o seu negócio?

- 0-20% (1)
- 21-49% (2)
- 50-74% (3)
- 75-100% (4)

**End of Block: Delivery Service**

**Start of Block: Delivery Platforms**

Q16 Selecione as empresas com que trabalha.

- Uber Eats (1)
- Glovo (2)
- Bolt Food (3)
- Volup (4)
- Please (5)
- Vincitables (6)
- Cookoo (7)
- Comer em Casa (8)
- Outra (9) \_\_\_\_\_

Q17 Das plataformas que apontou, diga-nos, por favor, qual o volume habitual de pedidos semanais em cada uma delas. (Exemplo: uber:20, bolt-20, glovo-20)

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Q18 Possui estratégias semelhantes em todas as aplicações em termos de menu, campanhas promocionais e preços?

Sim (1)

Não (2)

*Display This Question:*

*If Possui estratégias semelhantes em todas as aplicações em termos de menu, campanhas promocionais e... = Não*

Q19 Porque razão?

---

Q20 Tem um valor de pedido médio (valor que o cliente gasta, em média, por pedido) semelhante em todas as aplicações?

Sim (1)

Não (2)

*Display This Question:*

*If Tem um valor de pedido médio (valor que o cliente gasta, em média, por pedido) semelhante em toda... = Não*

Q21 Por favor, elabore sobre a questão anterior e exemplifique quais são as suas estatísticas de pedido médio em cada plataforma. (Exemplo: uber:20,5€, bolt-19,4€, glovo-21€)

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Q22 Denote, de acordo com a sua experiência, qual a sua plataforma preferencial e porquê.

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Q23 Evidencie quais os principais desafios da sua parceria com as plataformas.

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Q24 Se quiser deixar algum comentário, por favor faça-o aqui.

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**End of Block: Delivery Platforms**

Appendix B: Remaining Concepts' brands operating in Portugal



Figure B1: Milanesa House (Source: Glovo, 2022e)



Figure B2: Mila's Sandwiches (Source: Glovo, 2022e)



Figure B3: Meraki Pita (Source: Glovo, 2022f)



Figure B4: The Urban Kebab (Source: Glovo, 2022f)