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Abstract

Purpose – The purpose of this paper is to characterize the performance of online food delivery companies in Brazil and to analyze the content of the websites of these companies with a view to its use as a site for conducting business transactions.

Design/methodology/approach – This paper used a qualitative and exploratory approach through the collection and analysis of data from a sample of 30 companies operating in the online delivery sector in Brazil. Reviews of their websites have also been conducted through parameters involving aspects of content, usability and functionality.

Findings – The Brazilian main platforms received large foreign investment, growing with the acquisition of companies, making them market leaders. There was a greater presence of these companies on social networks, publicizing and interacting with their customers, increasing business visibility and attracting new prospects. The results of the sites analysis showed that the dimension “content” was the one with the highest incidence of attendance, followed by the dimension “functionality” and then the dimension “usability.” The downside was the access security parameter since only 54 percent of websites showed the use of encryption capabilities and secure site.

Originality/value – The online delivery service is growing rapidly, bringing together innovation and convenience to their customers, coupled with ease of access to mobile phones and internet, that contributed toward the emergence of a large number of platforms that offer this service in Brazil; despite being a relatively new service, its growth was accompanied by a strong sector consolidation process and by the creation of large groups supported by international capital.

Keywords Internet, Service delivery, APP, Service marketing, Mobile application, Food delivery

Paper type Research paper

1. Introduction

In the mid-2000s, the first online food delivery companies in Brazil emerged. This occurred simultaneously with the growth of internet use and the emergence of similar services in other parts of the world. These companies can be characterized as business platforms that offer order services, payment and monitoring of the process and are not responsible for the preparation and order delivery operations. Thereby, a division of tasks between these platforms and commercial establishments began to emerge.

So far the food delivery service was offered usually by their own establishments by telephone, most of the time, or requests by e-mail. Such establishments worked with a complete structure of delivery services to their customers, i.e., from the requests, through food preparation and payment receipt until the final product delivery. With the arrival of digital platforms, commercial establishments have gained the option, and opportunity, to focus only on process operation steps, i.e., in their core business.

The increased purchasing power of C and D classes associated with the need for fast food as a result of the lack of time, extra convenience, improvement in telecommunication infrastructure and the low cost of smartphones, among other factors, allowed the rapid growth and exponential of this new business model (Bezerra *et al.*, 2013; Machado and Pigatto, 2015). At the end of 2015, it was possible to identify at least 30 companies offering the online delivery service.



In various regions of Brazil, the development of this market attracted the interest of numerous businesses that have switched over to offer this type of service. Some of these companies have excelled enough to attract the interest of external stakeholders, including international investments. Another important factor that increased the interest of international investors in companies of this sector was the increasing number of Brazilians who use smartphones and who, consequently, began to consume more products and services of a kind (O Estado de São Paulo, 2015). As a result of these investments, between 2014 and 2015, the two largest companies – iFood and HelloFood[1] – captained by international groups, acquired nine Brazilian companies that provided such services in different regions of Brazil.

In principle, it is possible to suppose that this new business has brought benefits to all involved. The emergence of specialized companies in providing online delivery services enabled the consumer to choose the product/service (in this case the type of food and the restaurant) quickly and easily compare between the options available. For commercial food establishments, it was possible to reduce tasks and investments in non-core activities. Meanwhile, for these companies, the increasing use of the service by a growing number of consumers has generated the highest number of accesses, a factor that serves as an indicator to attract new restaurants to its website and also investors for business expansion to other regions.

However, for the consolidation of this business model, as with other business models based on the internet, it is necessary that this model offered the delivery service with an easy interaction platform to the final consumers.

Thus, this paper aims to characterize the performance of online food delivery companies in Brazil and to analyze the content of the websites of these companies with a view to its use as a site for conducting business transactions.

This paper was divided into five parts, including the introduction. Next, the theoretical reference discusses the concepts of services and e-commerce, especially the use of mobile internet. The following topic presents the methodology used for research development. In the fourth part, the results are presented. Finally, we present the conclusions and findings of the study.

2. Theoretical references

2.1 Services

Several authors seek to conceptualize services and distinguish them from goods. However, there is no exact conception for services and the central idea that contextualizes services in the economic scenario has changed according to changes in industrial processes and the demand of new consumers. According to Kon (2004), the sector consists of economic activities that are producers units related to site, form, time and psychological benefits, as well as facilitates the production and distribution of goods. In order to boost the production and distribution of goods, Vargo and Lusch (2008) focused on the creation of value as the central role of services, stimulating exchanges in the markets. Similarly, Grönroos and Gummerus (2014) stated that creating value is a process that includes the action of several actors – service provider, client and others – and that ends up creating value for the customer.

Among various existing concepts, Hoffman *et al.* (2010) described goods as objects, devices or things, and services as actions, efforts or performances. Zeithaml *et al.* (2014) defined services as acts, processes and actions offered or co-produced by an entity or a person to another entity or person. In both cases, the authors start from the assumption that services are intangible actions that have a general impact in the economy.

Some features traditionally define the services, such as intangibility, heterogeneity, inseparability and perishability. Of these, the intangibility has been questioned by several authors such as Lovelock (1983), Gummesson (2000), Vargo and Lusch (2008) and Moeller (2010).

These questionings and criticisms of the classification and categorization of services are well used to illustrate the interdependence and convergence between goods and services. It is possible to find companies that only offer services, such as a consulting company; companies that offer bundled services to the goods that they sell, such as maintenance offered by car dealers; and companies who deliver goods as a result of the services provided, such as a dish eaten in a restaurant.

This convergence between goods and services grew strongly from the 1970s, when there was significant growth of services as a result of the restructuring process and technological change that brought down barriers between industries and reinforced the interdependence between sectors.

Besides facilitating economic transactions with other sectors, the expansion of services has allowed the expansion of industrial production by providing fundamental inputs to this sector and, consequently, the distribution of goods (Leon *et al.*, 2010). According to Chen *et al.* (2009), the creative use of delivery methods has increasingly become a new source of differentiation and innovation for companies that seek to offer services and products profitably, providing greater value for customers and enhancing the delivery methods in an effort to increase profitability and reduce costs.

As a result of the structural changes in the service sector, it is increasingly essential to know, meet and satisfy the consumer's needs, especially in the service sector, where the consumer has not the product possession for a second evaluation. The consumer, according to Grönroos and Gummerus (2014), will add the resources acquired from suppliers (services) with other resources (needs) and knowledge seeking to create value for himself. Thus, satisfying the consumer properly in the first transaction is essential.

In addition, the innovations in the services sector have been providing changes in the national and international economic environment. Despite having a lesser technological profile than the innovation in industry, it is possible to identify innovations in services affecting products, processes, organizations and the market itself.

The evolution of self-service technology, for example, promoted a deep change in the way customers interact with companies in service purchasing, where face-to-face has been gradually replaced by the "do yourself" with the use of machinery and electronic assistance anywhere, anytime (Fitzsimmons, 2003; Ding *et al.*, 2007).

According to Cai and Jun (2003), in online retail sales, face-to-face interaction is being replaced by interaction through internet-based communication tools such as e-mail, chat and SMS or the websites of companies, where customers can search, retrieve and place orders.

2.2 *E-commerce, mobile internet and the use of smartphones*

Changes in the context of consumption associated with facilities resulting from the adoption of technology allowed the incorporation of different services on mobile platforms based on the internet; this occurred that the information could be instantly exchanged, which attracted the interest of companies from various industries, including the food sector. In the evolution of self-service, presented by Fitzsimmons (2003), among the examples of electronic services are the online order/delivery, pay-for-view, online shopping and print boarding pass.

The services offered on mobile internet have different classifications. According to Kim *et al.* (2007), services are divided into the following categories: trade, which covers everything from the purchase of physical products to the mobile banking; communication, whose services include chats and e-mails management; and content, including the consumption of news and downloads. But for Reuver *et al.* (2013), mobile internet services are classified as follows: basic, such as surfing the web, search engines and e-mails; entertainment, including the use of mobile TV and download of games and music; and transactions, such as buying flight tickets, booking rooms and check-in at hotels.

According to Strauss and Frost (2012), the majority of e-business models consist of variations of existing marketing concepts, but the use of technology may make them more efficient. For some digital products such as software or music, the distribution channel can be all internet-based. Thus, when someone buys online software, the supplier already sends over the internet to the buyer's computer. On the other hand, non-digital products such as flowers or wine, for example, can be purchased online, but they are delivered by the carrier. In this case, the buyer can take advantage of the information distribution function to monitor the exact location of the expedition using the web.

According to the Yang and Fang (2004), Organisation for Economic Co-Operation and Development (OECD) (2013) and Chan *et al.* (2016), technological improvements that facilitate trade can bring benefits such as reduction of transaction costs and possibility of more information to participants, increasing access to a wide range of products, efficiency gains as well as result in welfare improvements for the entire economy.

Progress of the use of mobile internet took place in parallel to the emergence of new technologies that allow user interaction with information. In December 2015, the number of mobile phones in Brazil exceeded 257 million units. There were 149.1 million devices capable of receiving 3G internet signals and 25.4 million with access to the 4G internet (Agência Nacional de Telecomunicações, 2016; Teleco, 2016). Linked with this, in 2014, the mobile phone exceeded microcomputer numbers and has become the main mean of internet access in Brazil, reaching 29.6 million homes (Instituto Brasileiro de Geografia e Estatística, 2016).

These devices, known as smartphones, along with the most diverse mobile applications, provide a new and powerful platform for e-commerce growth, especially for business to consumer (B2C) operations. These new applications also allow users to scan product codes, compare prices and buy products online (OECD, 2013).

As a result of this expansion an innovative business model called m-business (mobile commerce) has emerged. It only requires the use of a smartphone connected to an internet network in which the consumer begins to use more, the search for goods and services than the calling mechanism originally proposed by mobile devices (Kalakota and Robinson, 2002).

The use of the internet as an information and transaction exchange mechanism between enterprises and individuals has evolved significantly since the 1970s, when transactions were restricted to relations between large companies from private networks business to business operations (B2B). E-commerce is defined by Clarke (1999), Boyd *et al.* (2003) and Organisation for Economic Co-Operation and Development (OECD) (2011) as the commercialization and distribution of goods and services through telecommunication tools specifically designed for the purpose of receiving or making requests. Thus, inserted into e-commerce, B2B transactions evolved to B2C involving also the final customers and consequently for m-commerce.

According to Coursaris and Hassanein (2002), m-commerce is a natural extension of e-commerce, where both share fundamental business principles. But the m-commerce acts as a new channel, which adds value to e-business processes and as a new way to meet customers' evolving needs.

The e-commerce improves operational and economic efficiency for businesses by expanding the reach of the market (geographical distance and number of consumers) and reducing operational barriers and costs (marketing campaigns and information exchange) (Boyd *et al.*, 2003; OECD, 2011; Dan, 2014).

For consumers, e-commerce provides benefits by providing information on products and services, helping in locating vendors, facilitating price comparisons, offering convenient delivery and allowing them to easily purchase through a computer or a mobile device wherever they are.

According to Boyd *et al.* (2003) the ease to request and pay for products online and receive them at the door is a major convenience of e-commerce use identified by the final consumers.

The growth and strengthening of m-commerce is a result of the dissemination of portable devices (smartphones, tablets, laptops) that support mobile electronic transactions associated with the consolidation of high-speed internet networks, which allowed more stability and connection speed of electronic devices (Coursaris and Hassanein, 2002; Wang *et al.*, 2006; OECD, 2013).

According to Persaud and Azhar (2012), although mobile phones have enabled consumers to improve their private and social lives, companies used it as a new marketing channel. According to Roach (2009), the use of the mobile phones allows to obtain personalized information to promote goods, services and ideas to consumers in a specific time and location. According to Wang *et al.* (2006), interactivity, location-based services and delivery added value to customers have become increasingly important to gain a competitive advantage in the mobile market (mobile marketplace), making the strengthening of relationships with key customers necessary.

Similarly, Zomerdijk and Voss (2011) and Santos and Spring (2013) stated that new ideas of services often emerge from the joints of the suppliers on how existing services can be delivered differently by changing the experiences of customers and leading improvements in processes (development of new services).

In this respect, Chen *et al.* (2009) proposed two main types of innovation in delivering services: the introduction of new service channels for services and clients existing when the company offers a service through the internet and is now offering by smartphone and the introduction of new service channels for new services and customers when a physical store now offers internet services not related to the product of the physical store.

Thus, some changes in the characteristics of services, especially with respect to innovation, can interfere in the way in which people use the technologies, although this is not an isolated factor. When dealing with consumer behavior these changes have the same potential, especially in relation to the eating habits of the population.

The possibility of buying food online while remaining more time at home or at work, for example, has become an option for many people. Thus, changes in the lifestyle, along with the use of smartphones in the daily routine, allowed the emergence of the online delivery model, which could be viewed as a business opportunity.

2.3 Consumer behavior

The presence of women in the workforce, growing urbanization and the increase in family income have made the habit of eating out more frequent (Bezerra *et al.*, 2013). In the period 2008-2009, expenses with eating out home represented 31 percent of the population's income, 7 percent higher than that observed in the period 2002-2003 (Instituto Brasileiro de Geografia e Estatística, 2004, 2010).

For Bezerra *et al.* (2013), the habit of eating out has grown among young males with higher incomes and who live in urban areas. The authors noted further that foods with higher calorie content are some of the food products that are preferred by the public in general.

The habit of eating out is one of the pillars of the concept of online delivery applications, helping to determine the consumer behavior and classify it. According to Machado and Pigatto (2015), until the early 1990s, the habit of eating out was a secondary activity and therefore unnecessary. They also claim that it was not a priority in everyday decisions and that people chose a la carte restaurants, which took time and were costly; thus, people preferred to cook at home.

For Souza (2005), changes in the lifestyle, culture and eating habits are a result of so-called globalization, caused by the development of new technologies and by political and cultural changes, which modified the daily routines and also led to a shortage of time. According to Ding *et al.* (2007), the time savings is the most important factor for customers among the motivations for the use of technology-based self-service.

According to Strauss and Frost (2012), besides social and cultural trends, individuals vary in their online behavior, based partly on individual differences, such as age, income, education, ethnicity and sex; a positive attitude toward technology, in the belief that technology helps make their lives easier and better; and the ability and online experience, which plays an important role in the exchange process, making consumers more adept that new users to find information and products quickly, resulting in less frustration and less shopping cart abandonment. Behavior change is also based on the features of customers during the exchange process, represented by the monetary cost, which, in the case of electronic transactions, goes beyond owning a device with internet access, including the method of payment; the cost of time because with reduced time, users wish to find well-organized and easy to navigate websites so that they can find what they want quickly; and the cost of energy spent and the psychological costs, both related to time, where the cost of energy includes the time to turn on the computer and access the internet, then navigate, whereas with the smartphone, the user can surf the web or send e-mails at any place, at any time, and psychological costs when the websites are difficult to navigate or are faulty.

The growth and development of the service sector has allowed consumers to prefer fast food; add to this scenario the ease and convenience generated by the technology, which created the conditions that allowed customers to choose their meals through delivery and fast foods, although some choose the delivery service for consumption at home and without getting around (Machado and Pigatto, 2015).

Mobile users can perform global searches to obtain information on products, to compare prices and to complete an order at any time and from anywhere (Grunert and Ramus, 2005; OECD, 2013). For traders, the widespread adoption of mobile phones is a huge marketing opportunity to reach and serve customers anytime, anywhere (Grunert and Ramus, 2005; Persaud and Azhar, 2012).

Thus emerges a new type of customer, who, according to Strauss and Frost (2012, p.104), "is multifaceted, while taking into account several different electronic media. He is hard to be identified online and does not remain on a website for a long time." In this way, the digital marketers need to understand the personal motivations for the purchase of goods and services in the short and long term, developing strategies to brand loyalty. Individuals have their own characteristics and personal resources that are applied in the exchange process, which in turn takes place in a technological, social/cultural and legal context, being also driven by marketing motivation. In the social and cultural contexts, this new client does not hold himself/herself to traditional media, and increasingly uses the internet for information, products and everything he/she wants when and where he/she wants. With this, companies need to engage them with relevant content to attract online consumers on the basis of reputation, relevance and engagement.

In Brazil, it is possible to identify several companies operating in the online delivery market, with national, regional or only local presence (Machado and Pigatto, 2015).

3. Methodologies

For this research, the qualitative and exploratory approach was used through the collection and analysis of data from online delivery companies. Reviews of their websites have also been conducted through parameters proposed by Vilella (2003) involving aspects such as content, usability and functionality.

For the definition of the sample, web searches were conducted using terms such as "delivery online," "delivery," "app," "application," "ordered by cell phone," "food service" and "food outside the home." A group of companies has been listed, using information available in magazines, newspapers and news portals and the websites of companies offering online food delivery services in Brazil. The sample was selected by convenience from a list of companies, considering the survey period between 2014 and 2015.

Subsequently, the sites were visited to identify their main purpose, the availability of information, ease of ordering, access to social networks and company history, among others. The analysis was limited to online food delivery sites. Although the survey was conducted between 2014 and 2015, all sites were revisited in 2016. During this period, 40 companies were identified nationwide, of which 10 were eliminated from the sample because they had been acquired by competitors during the two years of analysis (five were bought by Ifood, four by Hellofood and one by EntregaWeb). Thus, the analysis carried out on a sample of 30 companies operating in the online delivery sector in Brazil.

The analysis of the organizational behavior toward the market was based on information such as foundation year, type of capital, geographic presence, services offered, number of attended restaurants, payment and use of social media for communications with customers. This information was obtained through secondary analysis of data collected in consulting reports, news sites and online platforms of the selected delivery companies.

An analysis of the websites of the sample was also carried out from an adaptation of the dimensions and parameters proposed by Vilella (2003), including the content, usability and functionality, and analysis variables and criteria reported by Daim *et al.* (2013) because it was a search in the food sector (Table I).

The analysis of the websites of the companies surveyed focused on the observation of the existence or otherwise of each of the parameters that make up the dimensions “content,” “usability” and “functionality” analyzed. The parameters used represent the criteria of Vilella (2003) adapted by Daim *et al.* (2013). Thus, when the existence of a criteria for a represented parameter was observed, “yes” was used, and when it was observed its absence, “no” was used.

With respect to the size of the content, the parameters of “scope, coverage and purpose” were assessed using the criteria corresponding to the identification of other links and social media in order to obtain additional information on the service provided or news from the company in other media. In the parameter “objectivity,” the criteria of clear and understandable language were analyzed, such as a step-by-step explanation of how to perform the order, payment, monitoring and until the product was delivered at the residence. In the analysis of the parameter “authority,” it was tried to identify the responsibility for the websites and the legitimacy of these ones by the existence of copyright.

In terms of the usability dimension with respect to the “operation,” it was necessary to access the portal via a mobile device in order to identify whether the layout of the websites fitted the mobile device format without the need to zoom. For the parameter “learnability,” the search tools, accuracy of information, availability of chat, e-mail and phone were analyzed in order to identify the company’s readiness to support, if necessary. As for the “intelligibility” parameter, the presence of easily accessible links on the same page was identified without the need to open a new page in the search for information on the application.

As for the dimension functionality, the “security” parameter was analyzed from the information on the present privacy policies in portals, such as encryption capabilities and secures website, visible, usually at the bottom of the websites. The parameters “interoperability” and “accuracy” were analyzed from simulated ordered in online delivery, in order to identify information on a method of payment, delivery rate values, time for accomplishment of the request and evaluation of the quality of service provided by other users. As for the “adequacy” parameter, the communication and interaction of companies with customers was analyzed through comments, questions, compliments and/or suggestions answered by companies through social networks such as Facebook, Twitter, Instagram or blogs.

The percentage of the presence of dimensions and parameters was obtained using descriptive statistics among the 30 websites analyzed. This method was chosen because of the impossibility of assigning different weights to certain parameters without a more refined analysis of the websites and is not part of the objectives of the paper. Therefore, it is

Dimension proposed by Vilella (2003)	Variable of analysis proposed by Daim <i>et al.</i> (2013)	Parameters proposed by Vilella (2003)	Criteria adapted from Vilella (2003) and Daim <i>et al.</i> (2013)
Content	Different channels for communication with the customer	Scope, coverage and purpose	Check for links to other information sources and social media
	Website compatibility with the lifestyle of the target audience	Objectivity	Content suited to the target audience needs Content is written in clear and consistent language style that is in line with the target audience
	Website reliability	Authority	There is a means to verify the legitimacy of the website, such as the presence of copyright The party responsible for the website is clearly identified
Usability	Easiness of use	Operability	Layout allows adjustment of the homepages size to several screen resolutions, such as mobile devices
	Rapid information search, responsiveness and effective offer in problem solving	Learnability	Analysis of whether the resources for easy navigation are available and are easily identifiable, such as site maps, new information indicators available and search tools for more precise information
Functionality	Ease of use, contain accurate information, clear and quick solutions	Intelligibility	Analysis of the presence of a human interface available to support the use, if necessary Clearly differentiated links in order to enable easy understanding of its contents
	Transmitted security	Access security	Website specifies a privacy policy and data security provided by users Website uses encryption capabilities and a secure website
	Additional information provided by the website	Interoperability	Payment information, evaluation of the restaurants by the user, delivery fee
	Information related to the delivery time of the request for the customer	Accuracy	Website enables access to delivery time information
	The interaction that website enables	Adequacy	Promoting communication environment in two ways. That is, if there is real dialogue between the company and customers, with real participation, such as forums, pages and/or communities in social media

Table I.
Dimensions for website analysis

Sources: Adapted from Vilella (2003) and Daim *et al.* (2013)

possibile that the results of the averages for the three dimensions could be a result of distortions between some parameters. When there is a distortion in the results, it will be indicated in the descriptive analysis.

4. Results

The delivery service in the food sector (fast food companies, restaurants or street food vendors) is traditional in the economy of many countries, including Brazil. Changes in the economy created growing urban classes and outlined new ways of feeding, contributing to changes in food consumption and promoted an urban lifestyle that approached people's eating places from their workplace and enabling new alternatives to family reunions.

The information that characterizes the performance of the online food delivery companies in Brazil and the description of the companies that currently operate in the country are presented in Table II.

One of the first electronic service requests for fast food emerged in 2001 in Auckland, New Zealand (Foodrunner, 2016). The online food delivery market can be considered a growth sector in Brazil and worldwide. Among the companies operating in the Brazilian market, almost all were created and started their operations after 2010, including the two largest operations: iFood and HelloFood. The iFood emerged in 2011, from the expansion of DiskCook, which was founded in 1997 with the purpose of making deliveries to restaurants as an alternative to traditional delivery services available for snack bars and pizzerias. Already, HelloFood had been founded in 2012 in Malaysia and in the same year began offering their services in Brazil.

Most companies, even those who were absorbed by competition in recent years, were emerged from local operations in one or a few nearby cities and expanded on the basis of the interest of consumers and owners of commercial establishments. With the growth of some of these companies, the entry of specialized investors (domestic and foreign) and the acquisition of smaller operations, some platforms began to operate nationally.

The companies analyzed have, mainly, national capital (71 percent), but some of them have received foreign capital investments or have arisen in other countries and migrated to Brazil in search of investments in a market with favorable characteristics for this business model, such as mobile technology, enthusiasm for technological innovations, a large consumer base and a growing market.

The main platforms received large foreign investment from groups that also operated in this sector or from investment funds and, with this investment, they grew, and currently operate with greater geographic reach and greater structure, which makes them market leaders.

The major networks have chosen to grow from the acquisition of emerging companies, controlling, thus, the market and moving to serve locations where they did not have a presence. The option for the acquisition of established companies instead of investment to set up a new company allows some immediate gains to the purchasing companies; access to the acquired company database; knowledge of the market; elimination of a competitor; and lower investment in marketing. From the 30 companies surveyed, 40 percent work nationally, whereas 60 percent still have local or regional operations.

Although they are classified as companies with national presence, some of these companies have an international presence, not only because they are a part of international groups but also because they used the same brand in other countries, such as the HelloFood and PedidosJá, among others.

Of the total companies that have local and regional geographic presence, 17 percent started their activities until the year 2011. In 2012 the number of companies established in this segment grew by 33 percent. The arrival of international capital, through the companies with national presence, began in 2005. However, it was between 2010 and 2011 that there was the highest concentration of foreign capital investments, totaling about 62 percent compared with 12 percent between 2005 and 2007, as shown in Figure 1.

Figure 1 also shows that the years 2011 and 2012 had the largest number of new companies, reaching 47 percent of the total. More than half of these companies have local operations and national capital, which may indicate reduced capital contributions and activities through reduced structures. Usually, these companies begin operations in mid-sized cities and later expand their operations to neighboring cities of similar to or smaller in size.

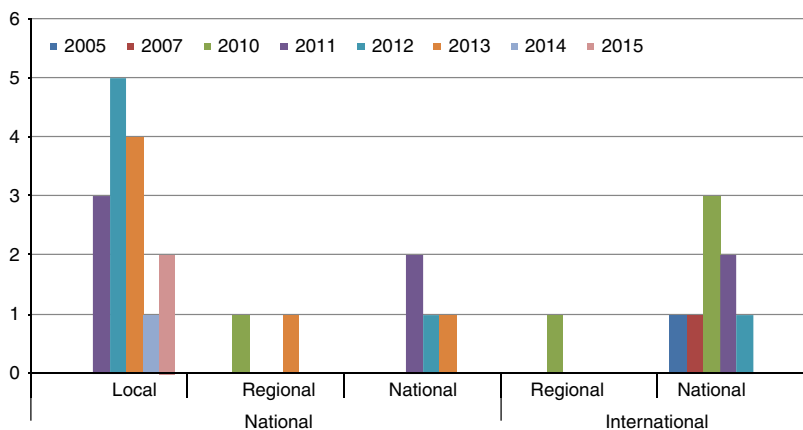
The concentration of new businesses in these two years highlights to the expanding market in this segment. Due to the necessity of scale and financial contributions, companies are going through a merger procedure, which means that they are being acquired by larger

Table II.
Characterization of
online food delivery
companies in Brazil

Company	Foundation year	Capital type	Geographic presence	Service type		Social media											
				Website	APP	Facebook	Twitter	Instagram	WhatsApp	G+	Blog	YouTube	Google				
Ifood	2011	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
HelloFood ^a	2012	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Delivey S.A.	2010	National	Regional	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Web Sabores	2013	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Comer na Web	2011	National	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Devorando	2013	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Vale Restaurantes	2011	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Restaurante Web	2005	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
EntregaWeb	2013	Foreign	Regional	X	X	X	X	X	X	X	X	X	X	X	X	X	X
EntregaWeb	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Topedindo	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Foome	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Ei Garçon	2011	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Rei da Entrega	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Delivey Much	2013	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Restorando	2010	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
EntregaDelivery	2011	National	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Pedidos Já	2010	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
E só pedir	2014	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Delivery São Paulo	2011	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Gourmex	2010	Foreign	Regional	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Hora da Fome	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Mix Cardapio	2013	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Aiqfome	2007	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
PapaRango	2011	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Go Delivery	2013	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Pedir Comida	2015	National	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
SuperRango	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
DiskOnline	2012	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Entrega 10	2010	Foreign	National	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Guia Tudo Delivery	2015	National	Local	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Notes: X, corresponds to existing services and social media in companies analyzed. ^aDespite the acquisition of HelloFood by Ifood in Brazil data of HelloFood and Ifood will be analyzed separately; datas to have been collected before the acquisition and the companies will operate separately

Figure 1.
Geographic
performance in Brazil
and origin of the
capital invested in
online delivery
companies



groups or are joining together and forming new competitors in the market, thereby reducing barriers to expansion.

In terms of the way in which companies offer their services and the dissemination channels used, it has been observed that smaller companies act differently from larger companies, which tend to invest more in social media, whereas small businesses do not act expressively on the network. It was observed that during a certain period of time, smaller companies had invested in social networks, but there was no continuity over time. This behavior can be considered contradictory since these companies operate on a business model based on technology and should make maximum use of these resources to expand the target market and disseminate the quality of their services.

The size of the companies also seems to be influenced by factors beyond the activities and integration in social media because it was found that larger companies offer their services through multi-platforms, including, in addition to the website, the availability of a mobile application, media not used by companies with a limited geographical presence and smaller in size. In this case, orders can only be made through the website of these companies. The financial costs and time invested in the development and management of a mobile application may be the reasons for the low demand for smaller companies. In larger cities, the demand for applications is highlighted because the available telecommunications infrastructure is higher. Added to this is the more agitated routine of its inhabitants.

In terms of investment in social media such as Facebook, Instagram and Twitter, for example, once again, we observed a higher performance of larger companies with wider geographic presence using social networks as a way of dissemination and direct contact with their customers. This increases business visibility and attract new potential customers. However, the smaller sized companies had used social networks for a certain period but stopped their posts.

This finding is important because according to Persaud *et al.* (2012), the use of social media by small businesses has advantages such as acquisition of new customers, strengthening of the brand image and achievement/disclosure of marketing promotions, among others.

These authors studied the adoption of social media in small service companies, and found the absence of five factors that influence the implementation of these channels: a clear understanding of the requirements of social media; understanding of the social media ecosystem; clear objective and prior planning; integration between social and traditional media; and training of employees. These factors combine into factors such as organizational

readiness, technology readiness, perceived benefits and financial resources as key inhibitors to the adoption of social media in small business.

Only 57 percent of companies provide apps, whereas Facebook and Twitter are the most used social media, corresponding respectively to 100 and 67 percent of preferences. On the other hand, social media such as Instagram, Google Plus (G+), YouTube and Blog are used by less than 50 percent of companies that offer online delivery services as shown in Figure 2.

Based on the information available on the websites of the companies surveyed, an analysis of content, usability and functionality of the same was carried out as shown in Table III.

From the 30 websites analyzed, three presented an “unavailable page,” making it impossible to access and consequently to analyze. These were Web Sabores, Mix Cardápio and Guia Tudo Delivery. The other companies did not show divergences and could be analyzed.

For the dimension “content” the analysis parameters were scope, coverage and purpose; objectivity; and authority. It was found that 88 percent of the analyzed online delivery companies present appropriate content.

In terms of the coverage parameter, 81 percent of companies featured links and easy access to social media available on the websites, such as the logo of social networking (Facebook, YouTube, Google+). Logos are easily identifiable by the consumer, understanding that the company provides additional information through social networks. The fact that the companies used social media does not mean that media are constantly updated or they have clear strategies in order to attract consumers to their platforms. In this respect, Strauss and Frost (2012) stated that in order to succeed in social media, communication strategies must be aligned with the organization’s objectives.

The parameters objectivity and authority were found in 92 percent of websites. That is, it is possible to identify clearly the content through a coherent language with the audience. Easily understandable words are used and there is also a step-by-step explanation on how to make an online order.

Since the objective of these platforms is to offer an intermediary service between commercial establishments and final consumers, clarity of communication and adaptation to the target audience’s needs are essential for maintaining the business. Product prices, payment method, the commercial establishment menu and whether it is open or closed at the time of access are standardized information on these platforms.

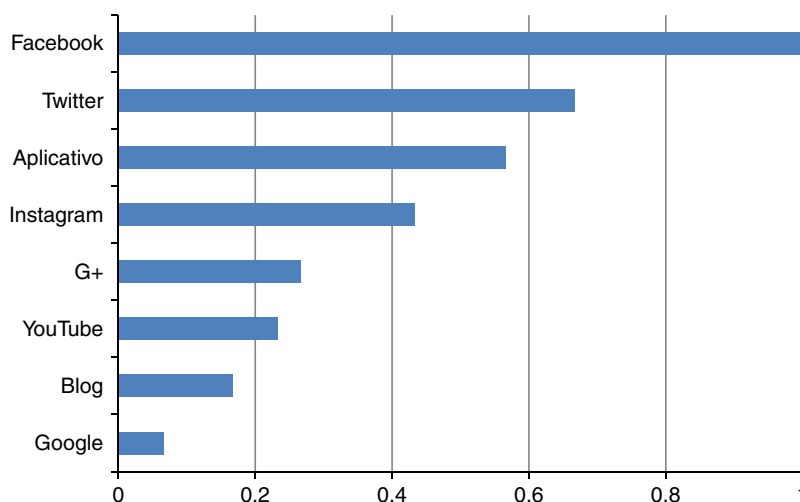


Figure 2.
Main divulgation means used by companies that offer online delivery services

Websites	Content Scope, coverage, purpose	Usability			Functionality Access					
		Objectivity	Authority	Operability	Learnability	Intelligibility	security	Interoperability	Accuracy	Adequacy
Ifood	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
HelloFood	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Delivey S.A.	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Comer na Web	Yes	Yes	No	No	No	Yes	No	Yes	No	Yes
Devorando	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Vale Restaurantes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes
Restaurante Web	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
EntregaWeb	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Topedindo	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes
Foome	No	No	Yes	Yes	Yes	Yes	No	Yes	No	Yes
Ei Garçon	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes
Rei da Entrega	No	Yes	No	Yes	No	Yes	No	No	No	Yes
Delivey Much	No	No	Yes	Yes	No	Yes	Yes	No	No	Yes
Restorando	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes
EntregaDelivery	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes
Pedidos Já	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
E só pedir	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes
Delivery São Paulo	Yes	Yes	No	No	No	Yes	No	No	No	Yes
Gourmex	Yes	Yes	Yes	Yes	No	Yes	No	Yes	No	No
Hora da Fome	Yes	Yes	No	No	No	Yes	No	Yes	No	Yes
Aiqfome	Yes	Yes	No	No	No	Yes	No	Yes	Yes	Yes
PapaRango	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes
Go Delivery	No	No	Yes	No	No	Yes	No	Yes	Yes	Yes
Pedir Comida	Yes	Yes	No	No	Yes	Yes	No	Yes	Yes	No
SuperRango	No	Yes	No	No	No	No	No	No	No	No
DiskOnline	No	Yes	Yes	Yes	No	Yes	Yes	Home page with error of the selected cities	Yes	No
Entrega 10	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes

Have you
chosen your
request?

Table III.
Analysis of
dimensions of online
delivery websites

In 92 percent of cases, the authority parameter indicated an easy identification of the responsible for the website, such as the presence of copyright, which allows the legitimacy of the content. Although present in almost all websites analyzed, consumers ignore this information.

The dimension “usability” includes the analysis parameters operability; learnability; and intelligibility. The operability parameter was observed in only 58 percent of companies in which the page layout was properly adjusted to the resolution of other media, such as mobile phones.

This feature is important because there are increasingly more smartphone users who prefer to browse the internet instead of installing the app of the online delivery company, by choice, afraid (online security) or equipment’s memory capacity.

The intelligibility parameter corresponds to the existence of clearly differentiated links that facilitate the understanding of the content. This parameter showed the best results in this dimension and was observed in 96 percent of websites. According to Daim *et al.* (2013), customers who choose to order online food believe that it is important that there is ease of use of websites that have accurate and clear information with different links by making it easy and quick to understand.

The learnability parameter concerning of resources for easy navigation (site map, searching tools and human interface) was found in only 42 percent of the companies analyzed. These online platforms use the location of the zip code where the consumer is or smartphone (GPS) location, showing restaurants that are close to him/her, which may explain the low presence of observed search engines. However, the absence of this mechanism increases the difficulty of consumers in finding restaurants that offer differentiated products, new products or those that have been recently added to the platform.

Thus, 65 percent of companies achieved a positive result in relation to the dimension “usability.” The high level of intelligibility parameter causes an increase in the rate of this dimension, despite the problems of the two other parameters: operability and learnability.

The dimension “functionality” includes the parameters: access security; interoperability; accuracy; and adequacy. This dimension was observed in 74 percent of the analyzed websites. Positive emphasis for the adequacy parameter, which corresponds to the communication and dialogue of companies with clients (and vice versa) through social media. This parameter had 88 percent attendance. According to Torres (2010) companies aim to access the social network to connect with various social groups, including their customers, in order to create relationships among them. This relationship provides an exchange of information that identifies the real needs and desires of consumers for the development of new products/services.

The interoperability parameter refers to information provided on the websites on payment methods (credit card, checks, etc.), evaluation of the restaurants by the users (opinions and notes) and delivery charges (based on the location of the customer and the cost for the company to deliver). The attendance index of this parameter was 85 percent.

The accuracy parameter showed a 69 percent rate. This parameter includes the information of the estimated time of order delivery to the customer. This means that the companies inform customers about the estimated delivery time based on the time taken by the restaurant to prepare the food and also according to the location, i.e., the distance between the address of the establishment and the location of the customer. Information on the estimated delivery time of the request is a determinant in the confirmation of purchase. If there is information of delay in delivery, the customer may choose another restaurant available on the online menu, without spending your time in this process.

The downside was the access security parameter since only 54 percent of websites showed the use of encryption capabilities and secure site. In the event of a financial transaction, the lack of access security will be a problem to increase the number of clients and keep those who

use the site. Security differs from privacy. Daim *et al.* (2013) argue that the first aim is to protect users' personal information, in the absence of which there may be a fraud. The lack of privacy occurs when customer's data are likely to be passed onto other websites. Therefore, the negative result of this parameter becomes alarming due to the fact that information such as delivery address and customer's personal data is necessary to complete the order.

5. Conclusions

The introduction of a new way to make food orders through online platforms attended to a demand created by changes in behavior and lifestyle, where consumers search for ease and convenience. These platforms allow consumers a wider range of simultaneous options in order to optimize time. The results showed that the online delivery service is growing rapidly. The sector includes innovation and convenience to their customers, leading to increasingly new users of this platform.

The growing consumer interest in convenience coupled with ease of access to mobile phones (smartphones) and the internet network have contributed toward the emergence of a large number of platforms that offer delivery services in Brazil, mainly from 2010, which demonstrates that this is a service that is still evolving. Despite being a relatively new service, the growth in the number of companies offering online delivery services was accompanied by a strong sector consolidation process and by the creation of large groups supported by international capital that operate throughout the national territory.

In terms of the way in which companies offer their services and the dissemination channels used, The "content" dimension presented the highest occurrence of the parameters analyzed in the websites, followed by the "functionality" and the "usability".

Regarding the "usability" dimension, about 35 percent of websites did not meet all parameters, and 58 percent even hadn't information search tools. According to Vilella (2003), it is through usability that users gain the advantage of speed in obtaining the results searched. If customers access online delivery platforms in search of agility in ordering the meal, and find it difficult to obtain information, they will probably no longer use the appliance or the service will be poorly evaluated.

Although the dimension "content" yielded a good result in the analyzed websites (88 percent), it is necessary to keep in mind that it is the customer who completes the entire process through self-service, i.e., choosing the establishment, making the order, choosing the payment method and, finally, monitoring the order until its delivery. Therefore, the online delivery companies should be focused on the clarity and objectivity of the website, always seeking to make it easily understandable. For Fitzsimmons and Fitzsimmons (2011), technology holds the meeting between services and consumers. This enables self-service and results in the benefits of low cost, workforce reduction, customization, convenience and control. Thus, the objectivity and understanding of the operation of the website, allowing self-service, is fundamental to obtain the expected results.

The results of this study will be used by the companies providing online delivery services to develop or improve their major strategies, particularly in respect to interactions with customers. Changes in consumer behavior and the increasing use of technology will lead to the intensive use of online markets, including other sectors such as clothing, books and beverages. The success of this business model depends on the greater availability of mobile applications (APP) given the greater connectivity of consumers, intensive use of social media, increased interaction and loyalty of consumers.

Thus the paper presents parameters that can be used by companies that operate in this business model to enhance their strategies and parameters that need to be monitored more closely by the companies. The results also suggest that, despite the significant growth of this new business model, there are still gaps that need to be corrected such as the shortcomings in the creation and operation of sites, which may have consequences such as

fewer customers. This will lead to loss of interest in the use of these sites, which, along with decreased reduction of business revenues, could affect the continuity of the business model.

Given the exploratory nature of the research and the fact that managers of these companies were not interviewed, thus resulting in certain limitations in the study, it is suggested that further studies be carried out including the companies in this sector and their managers for a greater understanding. In addition, new research on consumer behavior and consumption habits on the use of these services would be particularly important, given the limited knowledge of this new business model.

Note

1. In February 2016, the German group called Rocket Internet sold its food delivery operations for the English group called Just Eat. Through this operation, controlled by the Just Eat group, the iFood took control of the Brazilian HelloFood operations that belonged to the German group (Just Eat, 2016; Rocket Internet, 2016).

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