



Usaria UXalliance

Delivery Apps in time of COVID-19

GLOBAL BENCHMARK

April - May 2020

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Translation

Esc Translate

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How delivery apps have adapted their service during the COVID-19 pandemic.



Prepared meals, groceries
and drugstore items

GLOBAL BENCHMARK

Research led by Usaria, in
association with other twelve
firms part of the UXAlliance.

April - May 2020

Context

This research was conceived on April 3rd, 2020, based on the following question: how can we contribute in times of global crisis? The voices and knowledge of thirteen firms associated with the UXAlliance joined this project, with scope of action in 17 countries from 5 continents.

Giving rise to this research in the midst of a difficult public health situation: the alarming outbreak of a new coronavirus, **SARS-CoV-2**, whose onset was identified in late 2019 and gave rise to what the **World Health Organization (WHO)** has **declared as the COVID-19 pandemic.**

Governments around the world were forced to ask their citizens to confine themselves to their homes in order to stop the rapid spread of the virus. During said process, digital channels and tools became increasingly relevant during the confinement. These were considered "essential", especially in urban areas, with the purpose of facilitating social distancing and the adaptation to the circumstances.

Justification

Although this report has a circumstantial nature, it also allows us to consider agile decisions in pressing times; examples for any future crisis that may require a revision of the different chain stages from ethical perspectives.

This research results essential to explain how these apps have become part of the everyday life -especially in urban communities- in a world that has been transformed. It is key to understand how they handle the pandemic and make people's lives easier (or not) under such circumstances.

Generating a comparative research makes us think about trends, innovations, and in general, good practices and opportunity areas for the apps and their corresponding environments.

This kind of project is also key to revise how a basic process such as acquiring food and essential items (in this case, through online orders) can play an important role in crucial issues in any society.

Health

Risks associated with contagion and pandemic spread.

Ethics

Shared responsibilities, both of the app in its ecosystem (businesses, shoppers, delivery people and end consumers) and between them.

Economy

Transformations in order to keep industries stable (affiliated businesses, supermarkets, restaurants and transporters).

Empathy

Decision-making taking into account the collective and the needs of the entire ecosystem.

Although this report has a circumstantial nature, in which a particular moment is studied, it also allows us to consider **agile decisions in pressing times**; examples for any future crisis that may require a revision of the different chain stages from ethical perspectives. It is about identifying and pointing towards proper or ideal attributes of **the general customer experience, the fulfilment of the service, the offered communication, as well as the strategies in terms of health and care of the business ecosystem**, even in adverse circumstances.

What is the *raison d'être* of this Benchmark?

Without a doubt, people. Analyzing delivery apps as support tools for an everyday life impacted by a pandemic, makes us debate about people under circumstances of crisis.

People making deliveries by motorcycle or bicycle; those running restaurants behind closed doors to dispatch orders from their kitchens; people who -gloves on- pick the products that are to be dispatched by the supermarket; those who anxiously wait for their dinner to arrive home and -of course- people who, from their offices, make sure the service promised by the app is satisfactorily fulfilled, are mentioned here.

Particularities of this research

Quick changes to applications

It is important to take into account that the transformations of the applications are very frequent at this time. The features mentioned and their corresponding images, may have been modified.

Website mobile versions

There were cases of apps in the United Kingdom that had to move all their user experience from the app to their website in order to continue, not only working, but also making decisions and generating quick actions due to the circumstances.

Limited operation

In countries such as South Africa, there are just a few food delivery services in operation and their apps are not available.

Cultural specificities

Notes correspondize decisions of the mentioned apps will be made explicit in the findings.

Who participated in this research?

This research is led by **Usaria** -a Latin-American research and strategic design consulting company based in Colombia and Mexico- in a joint work with thirteen (13) of the twenty-six (26) companies affiliated to the **UXAlliance** around the world.

Participating companies and countries:

AssistDigital, Italy

AyerViernes UX, Chile and Argentina

Bayfront UX, Australia

Ipsos UX, U.S.

Mantaray, South Africa, Kenya and Nigeria

PeepalDesign, India

PXD, South Korea

Somia CX, Indonesia

Sutherland Labs, United Kingdom

Symetria UX, Poland

Usaria, Colombia and Mexico

User Intelligence, Netherlands

UTRLAB, Turkey

assistdigital.com

ayerviernes.com

bayfrontux.com

ipsos.com/en-us

mantaray.co.za

peepaldesign.com

pxd.co.kr

somiacy.com

sutherlandlabs.com

symetria.pl

usaria.mx

userintelligence.com

utrlab.com

13

Participating
companies

17

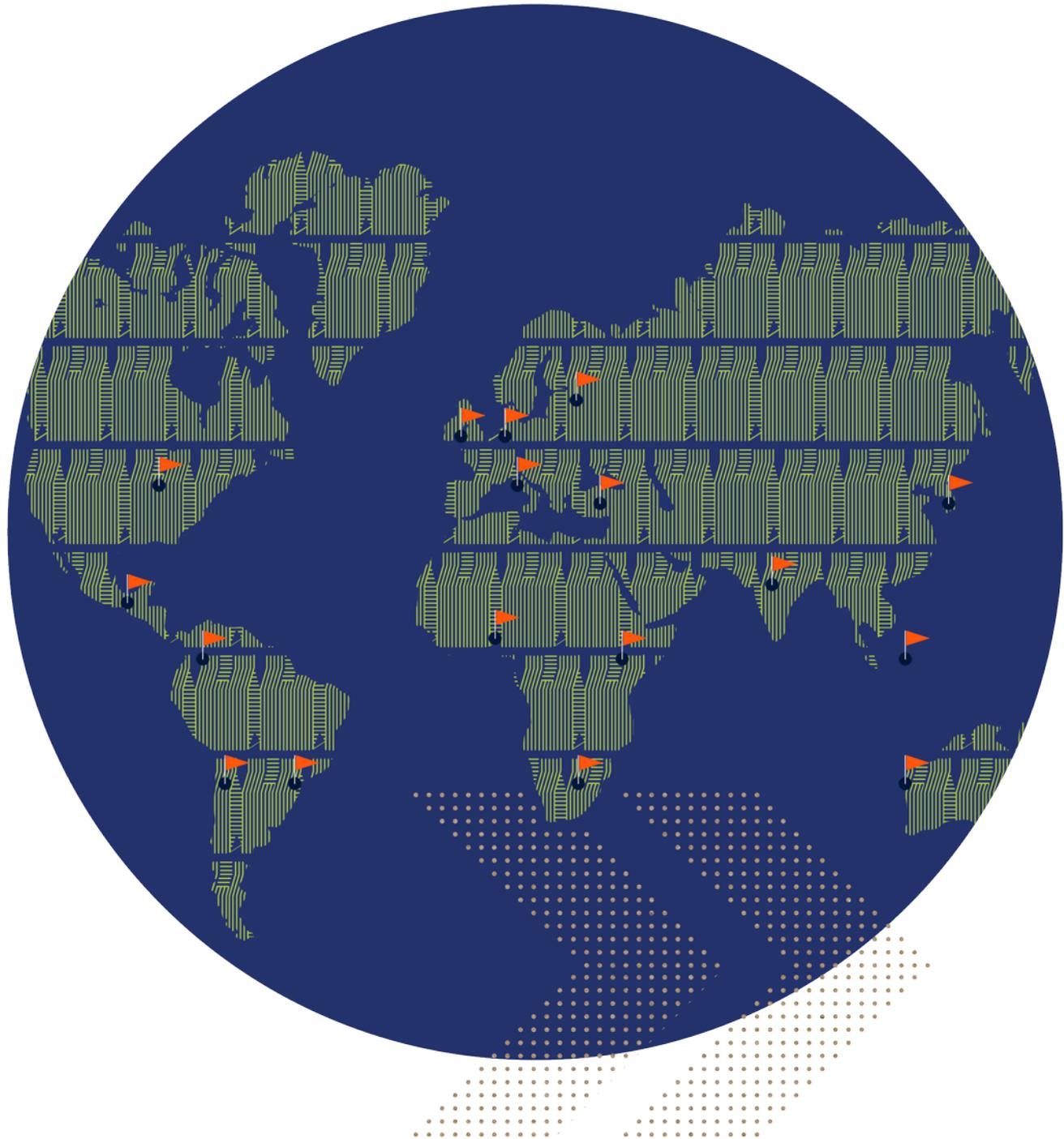
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General objective

The general objective of this research is to identify the **good practices of delivery applications around the world, regarding their management of the COVID-19 situation**, covering issues related to communication, user experience and strategies for the care of their business ecosystem.

Methodology

Benchmarking

This research model is defined as a comparative study based on reference points among similar products or organizations, in this case delivery applications.

What is the approach of this study?

This is a comparative and analytical study whose approach is the revision of features and functions of forty-seven (47) applications within the framework of the COVID-19 pandemic. Each section of findings highlights good practices and opportunity areas, novel trends and issues regarding the end consumer, when applicable. There were 30+ experts in 17 countries who analyzed both buying experience flows and their communicational practices.

It is complemented with a user survey and a mostly quantitative revision based on the scores granted in the UX and CX Score metrics.

Review on how an app handles the pandemic

Based on the questions segmented according to each section of the applications, the consultants were asked to identify new **features and functionality transformations of the apps** with regards to the pandemic. Additionally, they exposed which applications remained unchanged despite the circumstances.

Also, the usefulness that each inquired element may represent for the customer is assessed in a 1-5 scale:

Addressed sections and topics:

- Home
- Categories
- Affiliated businesses
- Products
- Cart and check-out
- Tracking
- Product arrival
- Innovations
- Support and General communication

Good, very good practices and opportunity areas were identified per topic.

Supplementary survey

331 people, ages 18 - 70, from 30 countries were inquired on their emotions, behaviors, changes and decisions at the time of shopping, during the COVID-19 pandemic. These were the addressed topics.

- Use of delivery apps.
- Grocery purchases.
- Prepared meals purchases.
- Drugstore purchases.

The survey was carried out in the following countries: Germany, Argentina, Australia, Belgium, Canada, Chile, China, Colombia, South Korea, Costa Rica, United Arab Emirates, El Salvador, Spain, The United States, The Netherlands, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, New Zealand, Peru, Puerto Rico, United Kingdom, Dominican Republic, South Africa, Switzerland and Turkey.

Note: Although it is not a statistically representative survey, its objective is to generate an approach to the transformations during this pandemic period in terms of product consumption -especially essential ones- through delivery apps. It sheds some light on people's reasoning regarding how, when and why shopping the way they do.

UX Score

*UXA Score: user experience measurement methodology according to the attributes established by the UXAlliance, for benchmarking studies.

The implementation of UX fundamental principles for a great user experience was measured, through the following product interaction attributes:

Learnability

Easiness to learn how an interactive system works.

Operability

The functions and features are accessible and easy to use.

Stimulation

The user is motivated to use the interactive system and encouraged to try new things with it.

Product fit

The system creates the perception of being ideal for the user.

Look and feel

The user is pleased with the look and feel of the system, as well as with the operational and/or signage sounds.

In order to make this measurement, the consultants of each country were asked to rate each attribute in a 1-5 scale, being 5 the highest score.

CX Score

Customer satisfaction analysis regarding the support area after a buying experience. In this point, the applications with the best quality in terms of customer service were identified, as well as those with opportunity areas to be intervened.

These were the addressed criteria:

Support effectiveness

Ability to effectively respond to questions, using the most appropriate channel. This attribute measures the user's satisfaction with regards to the customer service area.

Fulfilment effectiveness

Ability to properly provide delivery options in a transparent, appropriate and timely manner. This attribute measures the user satisfaction with regards to the delivery service.

Returns effectiveness

Ability to make returns and refunds in an effective, easy and convenient manner. This attribute measures the user's satisfaction with regards to the returns process.

In order to make this measurement, they were rated in a 1-5 scale, being 5 the highest score.

Reviewed apps

We asked consultants around the world to choose three delivery applications from their corresponding countries. The selection criteria are related to coverage, top-of-mind and innovative business models, among other aspects.

Forty-seven (47) apps were reviewed individually. Five (5) applications were selected by more than one country. These are: Uber Eats, Cornershop, Rappi, Glovo and Jumia. In total, thirty-eight (38) brands were assessed.

We worked with apps for the delivery of prepared meals, groceries, drugstore items or a mix of them.

Country	Application	Kind of application
Argentina	Glovo Pedidos ya! Rappi	Prepared meals, groceries and drugstore items. Prepared meals, groceries and drugstore items. Prepared meals, groceries and drugstore items.
Australia	Deliveroo Uber Eats Woolworths	Prepared meals. Prepared meals, groceries. Groceries.
Chile	Cornershop Rappi Uber Eats	Prepared meals, groceries and drugstore items. Groceries and drugstore items. Prepared meals, groceries and drugstore items.
Colombia	Merqueo Rappi Uber Eats	Groceries and drugstore items. Prepared meals, groceries and drugstore items. Prepared meals, groceries.
South Korea	11st Baemin Coupang Eats	Prepared meals, groceries and drugstore items. Prepared meals. Prepared meals.
United States	Doordash Instacart Postmates	Prepared meals. Groceries and prepared meals. Prepared meals, groceries and drugstore items.
Netherlands	Albert heijn Thuis bezorgd Uber Eats	Groceries and drugstore items. Prepared meals. Prepared meals, groceries.

Country	Application	Kind of application
India	<ul style="list-style-type: none"> Big Basket Swiggy Zomato 	<p>Groceries.</p> <p>Prepared meals.</p> <p>Prepared meals.</p>
Indonesia	<ul style="list-style-type: none"> Happy Fresh Halodoc Gojek (GoFood) 	<p>Groceries.</p> <p>Virtual medical consultations and drugstore items.</p> <p>Passenger transportation service, groceries and prepared meals. The assessment was based on the prepared meals service, GoFood.</p>
Italy	<ul style="list-style-type: none"> Amazon Prime Now Esselunga a casa The Food Assembly 	<p>Groceries.</p> <p>Groceries.</p> <p>Groceries.</p>
Kenya	<ul style="list-style-type: none"> Jumia 	<p>Prepared meals, groceries and drugstore items.</p>
Mexico	<ul style="list-style-type: none"> Cornershop Uber Eats Walmart 	<p>Groceries and drugstore items.</p> <p>Prepared meals.</p> <p>Groceries and drugstore items.</p>
Nigeria	<ul style="list-style-type: none"> Domino's Jumia Konga 	<p>Prepared meals.</p> <p>Prepared meals, groceries and drugstore items.</p> <p>Groceries and other.</p>
Poland	<ul style="list-style-type: none"> Glovo Pyszne Uber Eats 	<p>Prepared meals, groceries and drugstore items.</p> <p>Prepared meals.</p> <p>Prepared meals.</p>

Country	Application	Kind of application
United Kingdom	<p>Morrisons</p> <p>Sainsburys</p>	<p>Groceries.</p> <p>Groceries.</p>
South Africa	<p>Takealot</p> <p>Ucook</p>	<p>Groceries and drugstore items</p> <p>Prepared meals, food preparing kits.</p>
Turkey	<p>Banabi</p> <p>Istegelsin</p> <p>Getir</p>	<p>Groceries.</p> <p>Groceries.</p> <p>Groceries.</p>

Findings

Y O U R O R D E R
R E A D Y



What was found?

The decisions made and communicated in times of crisis show the strength or fragility of the ties between apps and their ecosystem

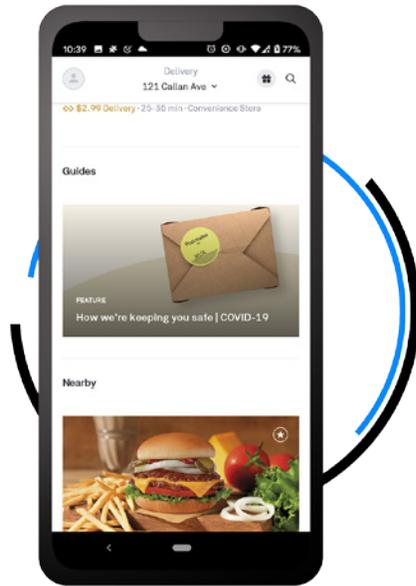
There are many parts to the system including the apps and their affiliated businesses, shops, suppliers, shoppers, delivery people, and users. As a result, a successful response to crisis is reflected in the ability to respond and their adaptive capacity in a unified way and not as independent entities.

When these decisions are made from **ethical, empathic, and responsible perspectives**, they also contribute to the user experience. Most of the assessed apps have fallen short in this respect.

However, there were examples of good practices with Indonesian, South Korean, American and Indian apps, highlighting, in an open manner, the efforts they make for a collective well-being during the COVID-19 situation.

Information on the pandemic turned out to be valuable as long as it is accessible and used in the right context

Some of the positive features we identified were the use of the app to mention health measures in place at their restaurants, to promote products that would have been sold at events canceled due to the pandemic, and -most commonly-to



Postmates, U.S.

offer a contactless delivery option allowing social distancing. However, only a few apps placed this information in the most relevant section of the app; most of them preferring to include this useful information in a special section or in the frequently asked questions.

Few apps identified particularities of their customers

The ones that did so, offered benefits perceived as positive. In countries like **Turkey and the United Kingdom**, it was common to find priority services for seniors, essential workers, vulnerable individuals, and health professionals.

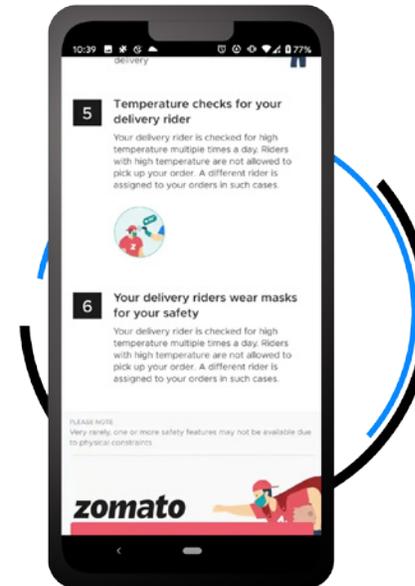
Information communicated through the platform was important for the end consumer

Providing certain information not only ensured a positive shopping experience but also impacted the perception towards the app as a responsible facilitator within a business ecosystem.

Similar trends for interface design and structure

There are some similarities in routes already known as effective. The apps are not far from the same selection path which includes categories, products, cart, scheduling, check-out, follow-up, and support.

Due to the crisis scenario, many of the reviewed applications may have made changes that are not shown in this research. It is important to place this study in the month of April, 2020.



Zomato, India

Practices to highlight

Clear priorities for customers with special needs.

Out of the 47 apps, just **seven (7)** offer discounts and easy service access for seniors, essential workers, health professionals and vulnerable individuals.

Communication regarding the health measures followed by delivery people and affiliate businesses.

Only **15%** of the apps communicate -and even integrate to the user experience flow- information on temperature screenings, cleaning and significant protocols in stores and restaurants. Likewise, just 15% mention similar measures with delivery people.

Few apps communicate initiatives to support people that are part of their ecosystem.

12% of the apps communicate strategies to look after their affiliate businesses, including actions to reduce subscription fees, marketing support, sales coupons to promote local restaurants, among others.

Out of 47 apps, only five (5) offer economic support for their delivery people, specifically due to COVID-19 affectations.

Top trends

1

Social distancing and personal protective equipment for delivery people: were most common.

93% of the applications recommend their delivery people to wear personal protective equipment. Face masks being the most frequent. Some apps admitted not being able to ensure the equipment is worn properly.

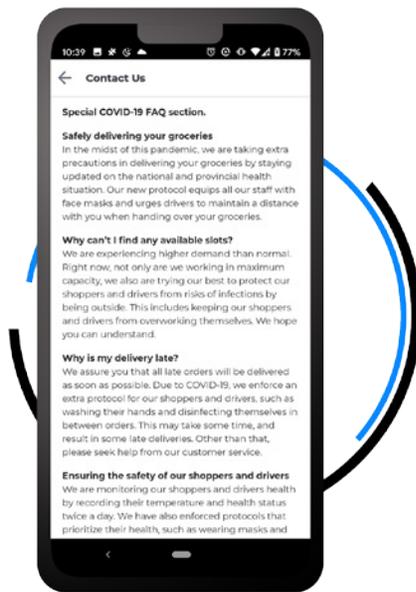
Also, most offered options to leave the package at the door or lobby. Out of the 47 applications reviewed, **twenty-six (26)** explicitly suggested contactless payment, i.e., **55.3%**.

2

Important information about health measures or Covid impact on the service was often hidden.

Although **67%** of the consulted apps had a key statement on the pandemic, **58%** keep it inside support, help, or the FAQ sections which are not always easy to access.

On the other hand, while **69%** of the apps had prominent Covid features on their home screen, not all of them allowed the user to explore the information further.



Happy Fresh, Indonesia

3

“Stay Home”: the pandemic is implicitly communicated.

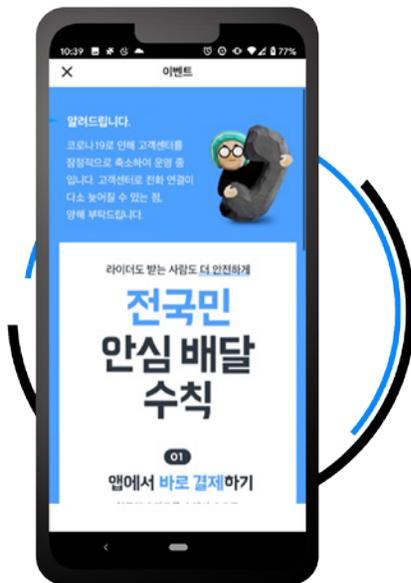
Words such as **COVID-19, pandemic** or **Coronavirus** are avoided. 89% refer to the situation without directly naming it.

4

Creation of new sections related to the pandemic.

Sixteen (16) apps draw the users' attention towards certain essential, cleaning, and hygiene products through new categories.

Detected opportunity areas



Baemin, South Korea

Limitation and shortage: out-of-stock products with no clear information

In most applications, it was not possible to know when there was a low stock. Only a few displayed this information.

Twelve (12) apps applied restrictions on the purchase amounts. Most did not notify the customer before, only at check-out, or when the user flow stopped.

Difficulty in scheduling orders and delivery delays

Only **36%** of the apps offered information on the changes caused by COVID-19 on their delivery times.

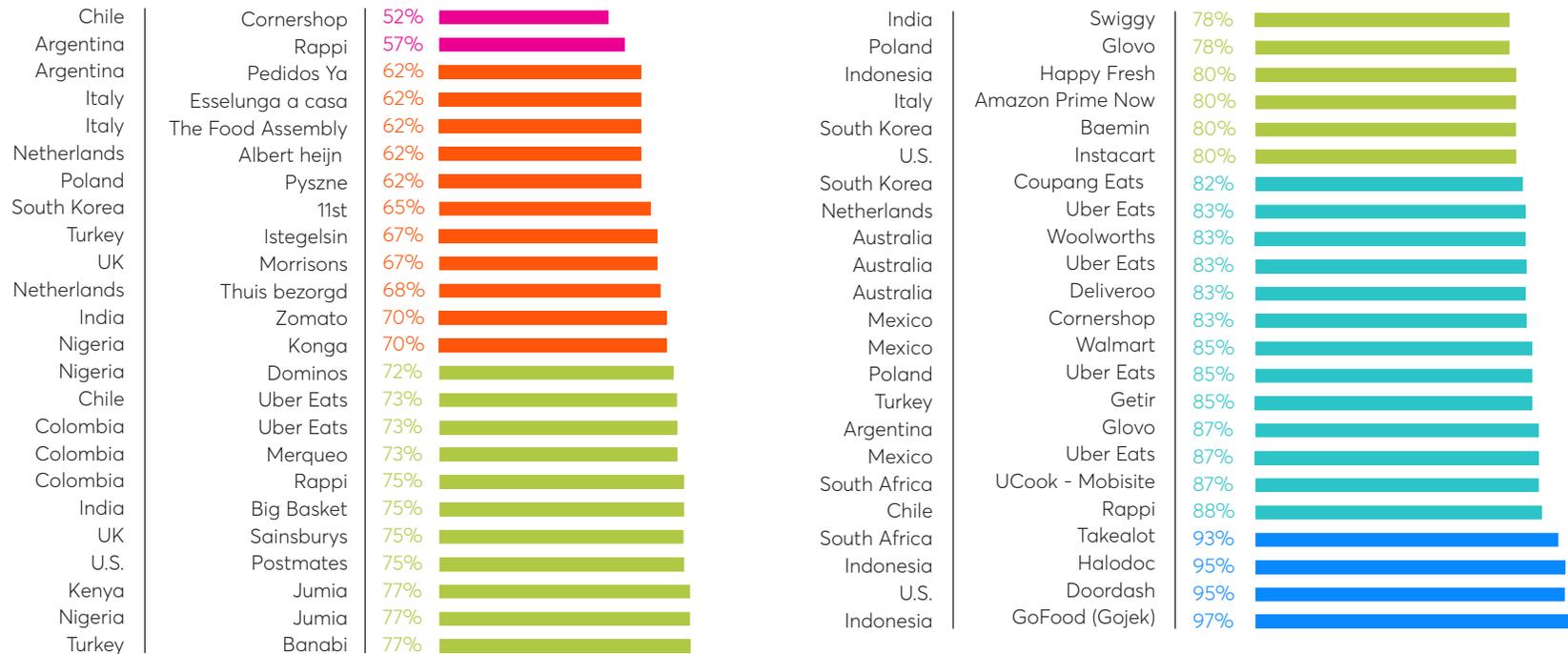
Eighteen (18) apps have issues scheduling delivery slots for groceries. These times may involve, 1-hour delays, or up to **fourteen (14)** days as the case of Konga in Nigeria, to deliver products that are considered basic and even essential.

Poor support and customer service: 30% of the apps do not establish how to be contacted

21% of the apps clearly offer customer service hotlines in the platform. **19%** offer to be contacted through emails, but users did not receive any response.

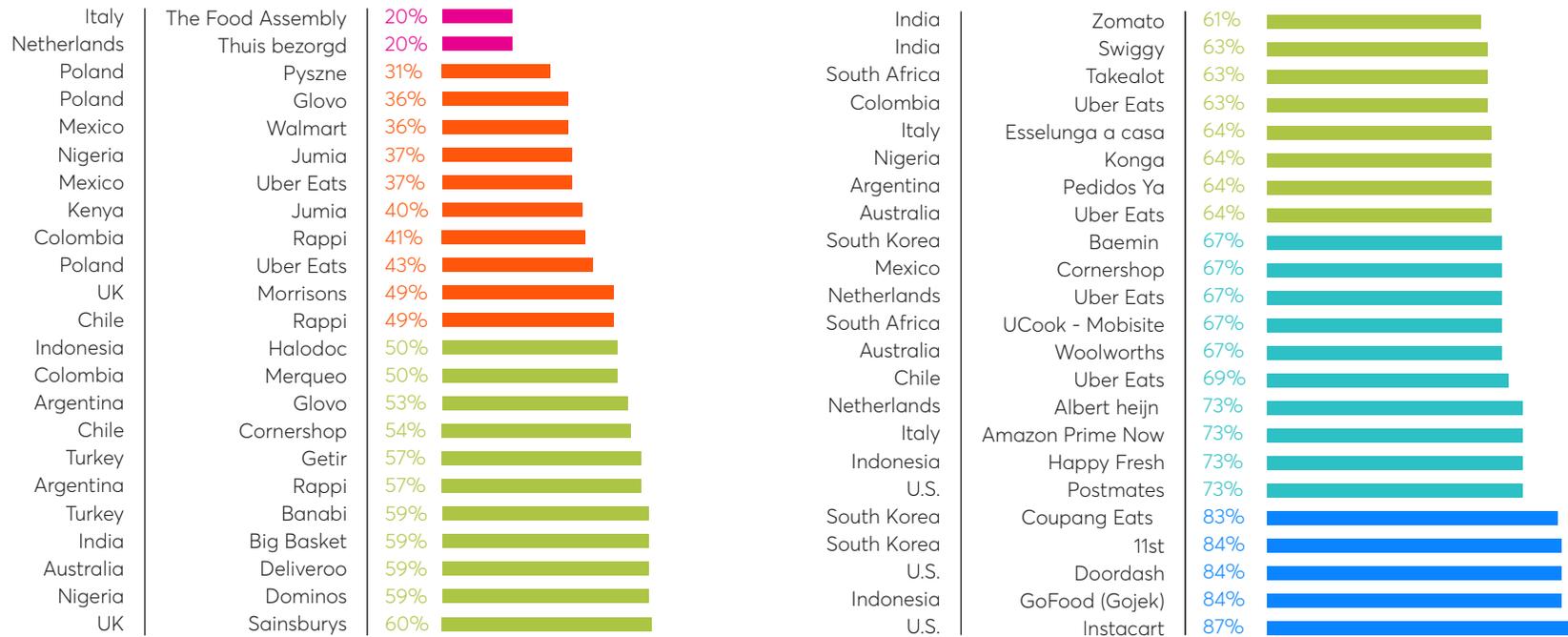
Highest UX Score

*For more information, check the Measurements section on page 164.



Highest CX Score

*For more information, check the Measurements section on page 117.



Gojek and its GoFood service, from Indonesia

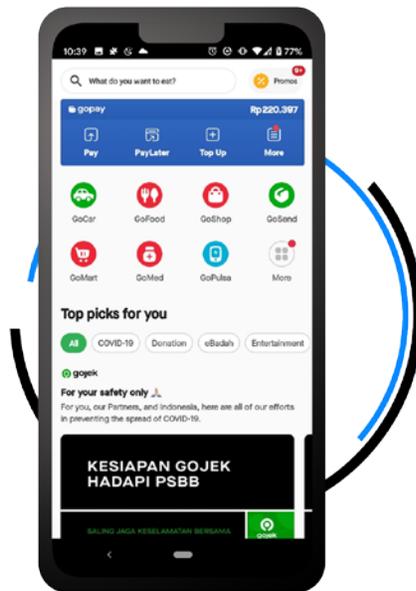
According to the ratings the application that provided an outstanding user experience is **Gojek, GoFood service** from Indonesia.

Gojek, GoFood service got the first place for the UX Score and the second for the CX Score. Both **11St (South Korea)** and **Doordash (U.S.)** obtained the same CX score as Gojek.

Gojek was outstanding for the following:

- Clear communication of protocols, for delivery people and affiliated businesses.
- Care for their stakeholders.
- Health information and recommendations for the end-user.
- Alliance with an application of telemedicine and drugstore items, enabling access to quick tests.
- Adhering to Government regulations regarding the pandemic.
- Efficient communication channels.

Who offered an outstanding global experience?



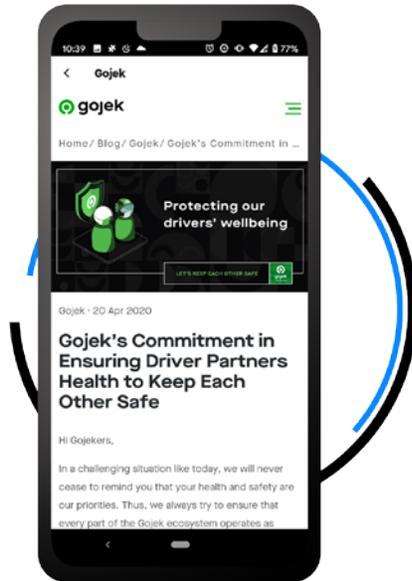
Gojek, Indonesia

Gojek (GoFood) was the highest-ranked in the COVID-19 context

Gojek (Go Food) (Indonesia) is one of the few apps in this research that has an open approach to the pandemic. Over and above to meeting the customer's expectations in terms of service. They took additional steps to fulfill their role as part of an ecosystem in a responsible, empathic, and proactive manner.

What measures have they taken in relation to the pandemic?

Although many of their initiatives happen outside the platform, they leverage every opportunity to let their customers know how they have adapted, through the application.



Gojek, Indonesia

Some of their initiatives are based on protocols and others on information for their users:

Implementation of protocols

For delivery people:

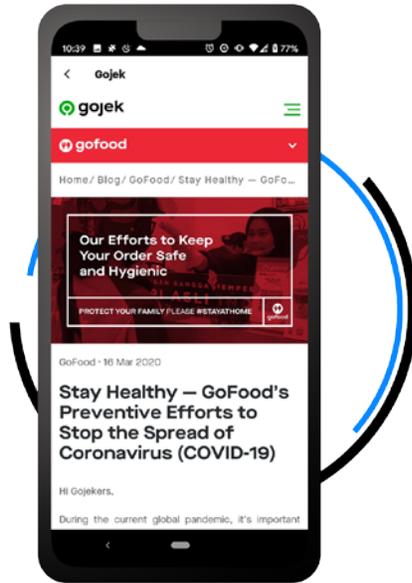
- Vehicle disinfection.
- Supply of disinfection and protection products and accessories.
- Temperature screening points in different areas of the city.
- A new protocol for contactless product delivery.
- Support fund.

For affiliated businesses:

- Kitchen cleaning protocols.
- Protection accessories for all cooks.
- Constant hand-washing protocol.
- Temperature screenings.
- Support fund.

Information for users

- Specific section with COVID19-related articles.
- Change in biosafety protocols.
- Health information.
- What to do at home tips.
- Campaigns relating to Government initiatives. (#dirumahaja which means "Just at Home").
- Donations fund for delivery people.



Gojek, Indonesia

In addition, **Gojek** created an alliance with **Halodoc** (Indonesia), An application for medical consultations and pharmaceutical products, which allows them to give **better-supported prevention and medical information, as well as access to COVID-19 quick tests.**

Gojek focused on the well-being of its entire ecosystem

The emphasis that **Gojek** (Indonesia) makes on protection and prevention was not only oriented to end-users, as in most applications. They look after the well-being of all their stakeholders.

They mainly focused on the delivery people, supplying protective equipment, disinfection products, and implementing constant temperature screenings in different meeting points of the city. These protocols, which may be found in other applications, are located in specific sections of the app such as the home screen or in the "help" and "articles" sections.

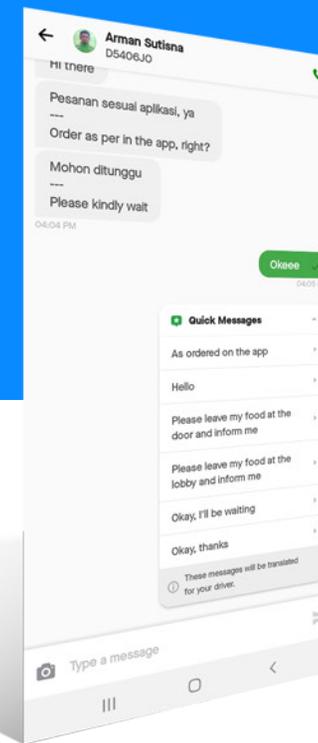
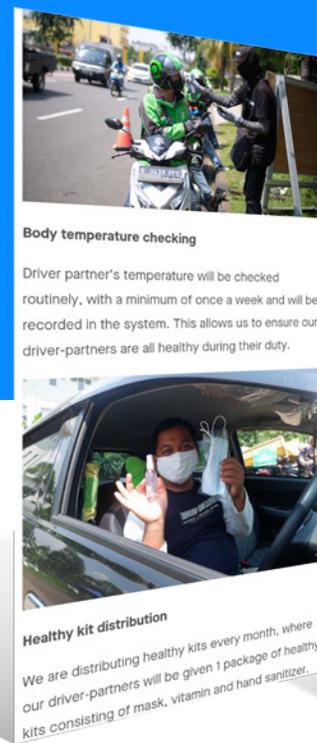
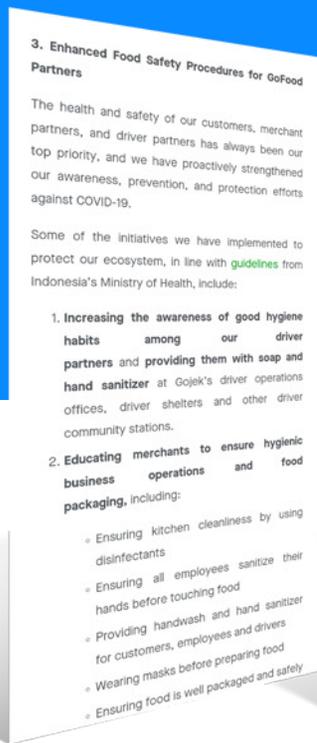
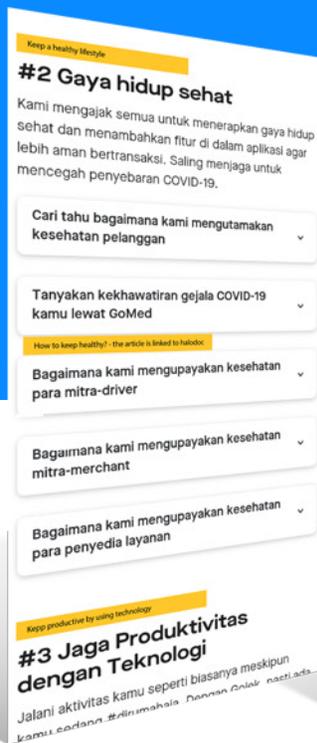
It was made public that founders decided to reduce management salaries in order to create a relief fund to support their businesses, partners, affiliates, and delivery people/drivers during the pandemic.

Multiple communication channels

In order to create a transparent communication strategy within the application during the pandemic, **Gojek** (Indonesia) implemented the following new communication tools:

- Essential products section.
- Chats with direct messages to the delivery person, with predefined messages indicating how customers want their package delivered at their door.

Additionally, they introduced tip-like information within the Home screen.



Lastly, regarding changes to their business, due to a government regulation that limited the number of passengers, **Gojek** decided to suspend the motorcycle passenger transportation service. This decision,

therefore, allowed the **GoFood** service to be strengthened by adding these drivers to the food delivery service in order to cover the high demand and avoid affecting the economic situation of its associates.

Scores

CX: 59/70

UX: 58/60

Usefulness rank: 5/5

Key points

1

Information on protocols and measures against COVID-19 within the application.

2

Focus on the well-being of all its ecosystem (users, delivery people, affiliated businesses, and vulnerable individuals).

3

Multiple communication channels.

4

Business changes in order to prioritize prevention and keep delivery times.

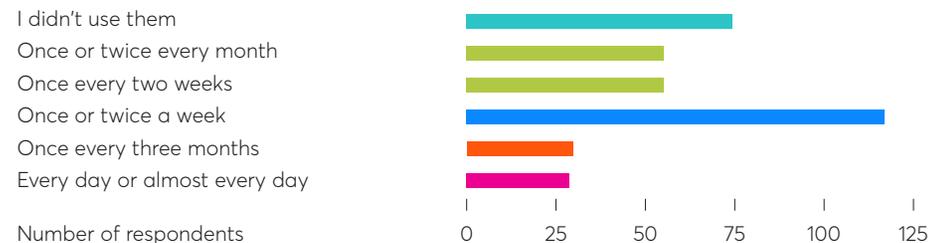
Relationship of survey respondents with delivery apps

The survey showed that **41%** of the respondents who did not use this kind of apps, started using them.

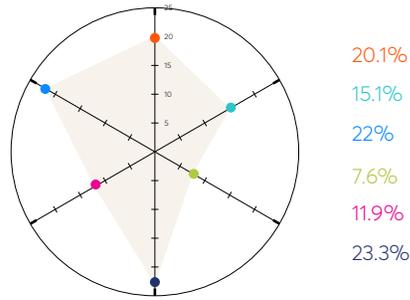
The survey showed that respondents who are still not using delivery apps, stated the following reasons: (in order of priority)

- Prefer choosing items personally in the store, supermarket, or restaurant.
- Are not sure whether their order will arrive properly.
- Do not trust digital payment methods.

How often do you use delivery apps **DURING** the COVID-19 pandemic?



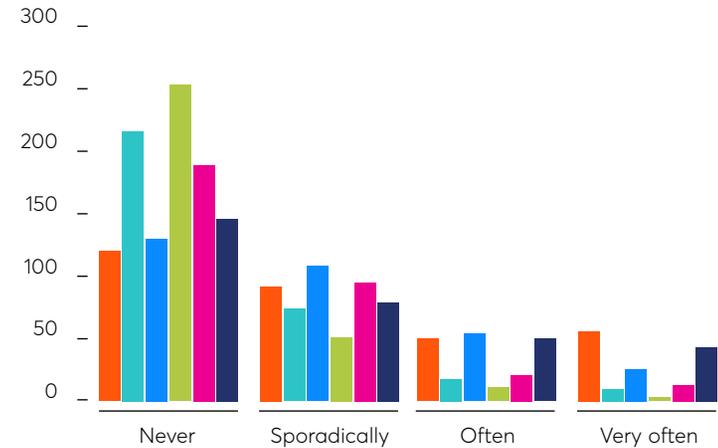
- Groceries
- Drugstore items
- Fast food
- Liqueur
- Desserts
- Meals



What was purchased through delivery apps?

During the pandemic, purchases through delivery apps have been more sporadic than constant.

What is bought through delivery apps? The survey shows that respondents who use these platforms have purchased the following: prepared meals (23.2%) for breakfast, lunch and



If you use delivery apps, what are your most frequent purchases?

dinner; fast food (22%); groceries (20.1%).

Respondents who stated shopping "very often" have a preference for prepared meals for lunch, dinner, and breakfast, followed by groceries and fast food options.

Summary of findings

YOUR WORD

ENVIRONMENT



Pandemic: What do delivery apps communicate on the subject?

What we analyzed:

Are apps explicit when mentioning the COVID-19 situation?

How do they communicate information on the pandemic?

Which are the key topics the apps want to communicate to their users?

How accessible is this information?

How much do they delve into information relevant to the user?

What is the tone and language they use to refer to the situation?

Which were the good practices and opportunity areas regarding the user?

What is the service experience like for the user during the COVID-19 situation?

Note: Due to the crisis scenario, many of the reviewed applications may have made changes that are not shown in this research. It is important to place this study in the month of April, 2020.

What we analyzed:

Do apps take advantage of the purchase flow to notify changes due to the pandemic?

How can the health standards of affiliated -or own- businesses/restaurants be ensured?

Is it clear for the user how to get access to products/food and to information regarding price changes (if any) in the application?

Which tools allow the user to clearly understand delivery times and slots?

What opportunities do applications offer in terms of health and health standards at the time of delivery?

What business opportunities have arisen from the apps?

How does the app interact with its ecosystem and take care of it during the pandemic?

Which are the good practices and opportunity areas in that regard?

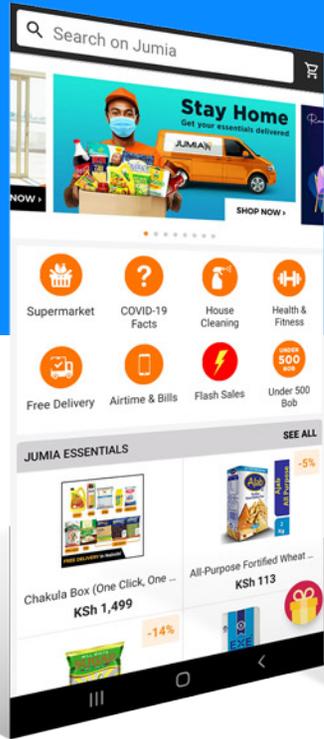
First impressions



N A M A P E D R E S S S
P A Y M E N T T

What we found:

Home screens with diverse priorities.



Jumia

Kenya

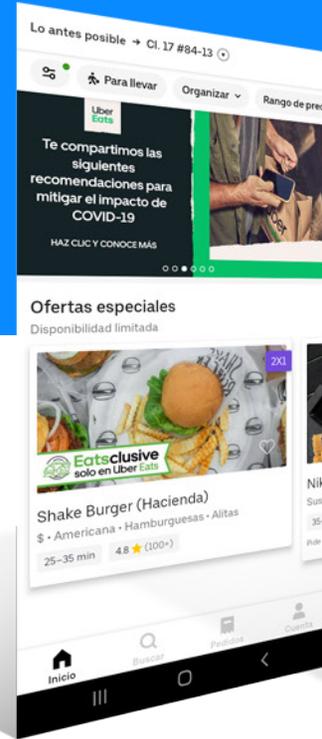
COVID-19 information relevance.



Walmart

Mexico

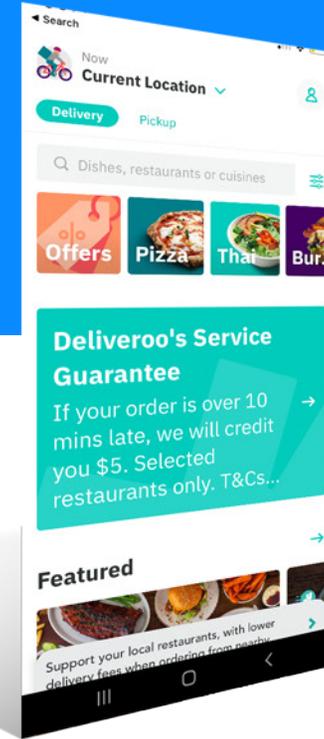
Some of the used phrases were "Live better at home" or "We do the shopping for you".



Uber Eats

Colombia

The rotating banner allowed informing about measures taken.



Deliveroo

Australia

Some Home screens did not mention the pandemic.



Zomato

India

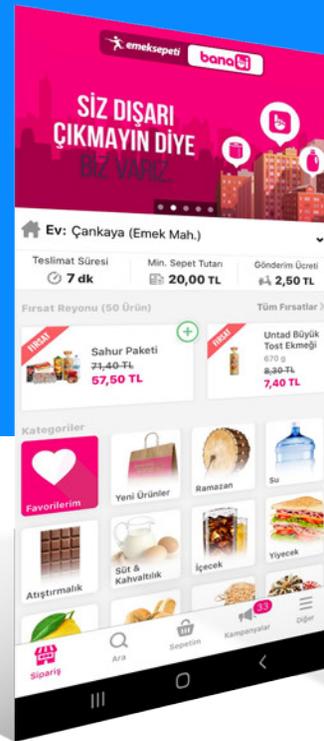
Mentioned hygiene measures for restaurant and social distance at delivery.



11St.

South Korea

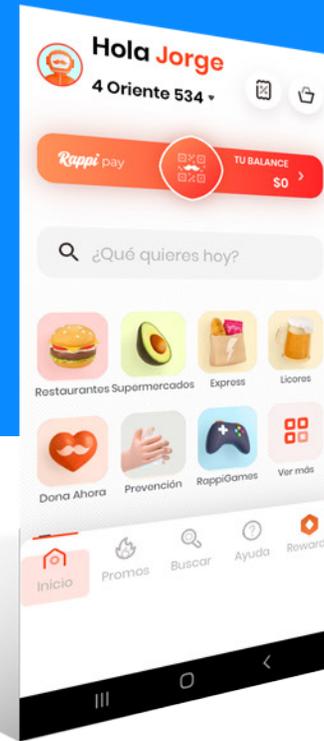
Included encouragement sentences related to COVID-19 "Let's get through it".



Banabi

Turkey

Its Home screen reads "We are here so that you don't go out".



Rappi

Chile

"Prevention" icon to find more information on COVID-19.

Home screens with diverse priorities.

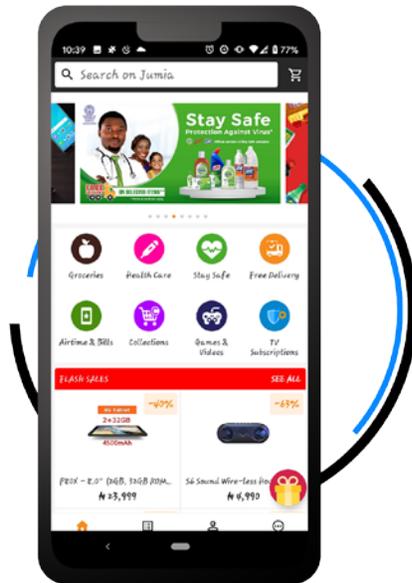
69% of the reviewed apps have featured elements in their home screens related to the COVID-19 pandemic.

Applications use different alternatives in order to call the attention of the user regarding the situation, service changes and decisions made by the app..

- Explicit banners with information on customer and community care.
- "Stay at Home" related messages.
- Discounts on specific products due to the pandemic.
- Discounts on delivery fee.
- Social campaigns.
- Image carousels with a combination of the above.

Overall, most apps appear to be interested in communicating news or sending notifications regarding COVID-19 through this section; **Zomato** (India) is **high-ranked for the usefulness of what is displayed on its home screen.**

Very good practices



Jumia, Nigeria

Zomato India

Offered clear information in its opening messages regarding the strict safety measures, contactless delivery and the promotion of the #StaySafe hashtag in a rotating banner containing general information. In addition, featured food images promoted exploring restaurants according to their hygiene measures.

Jumia Nigeria

On its home screen, displayed a “Stay home, stay safe” message in a rotating banner where cleaning and essential products were promoted. Also, prepared meals with the text “Stay Safe”. **Jumia** in Kenya, for its part, had more explicit icons on its home screen such as “COVID-19 Facts”, essential products delivery and a “Stay Home” message.

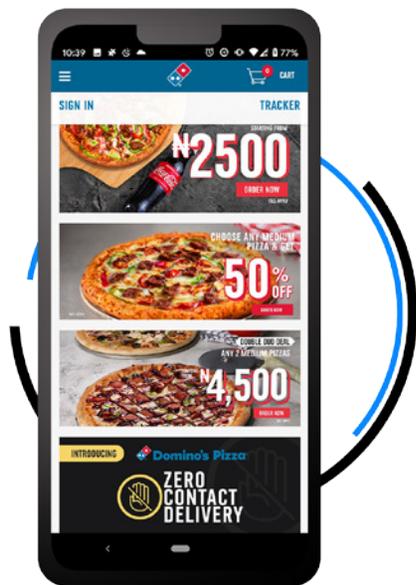
Doordash U.S.

Doordash, in the U.S., had a “free delivery” advertisement in a rotating banner which also displayed information on changes with regards to the pandemic and mentioned how the app was helping local businesses.

Uber Eats Colombia

In the case of Uber Eats (Colombia) there was information on recommendations to mitigate the impacts of COVID-19 in a rotating banner located on the home screen. However, in **Uber Eats** (Australia) there is no evident information regarding the pandemic. Only when going to the “Help” section there is a link with information on that regard that leads to the website.

Good practices



Domino's, Nigeria

11St South Korea

11St app from South Korea had a visible element in the banner area with information on COVID-19. However, it could be seen as an advertisement.

Banabi Turkey

"We are here so that you stay home", was the first message the user saw when entering **Bababi** (Turkey).

Baemin South Korea

On **Baemin's** (South Korea) home screen, there was a "free delivery" advertisement on the main banner.

Getir Turkey

Messages regarding social distancing or contactless delivery protocols were displayed on the home screen of **Getir** (Turkey), **Cornershop** (Chile), **Thisis bezorgd** (Netherlands), **Domino's** (Nigeria) and many other. Nevertheless, the need for greater interaction with said messages was evident in several cases.

Cornershop Chile

Glovo Argentina

Thisis bezorgd Netherlands

Domino's Nigeria

Rappi
Chile / Argentina

Rappi (Chile, Argentina) opted for an icon named "Prevention", with a handwashing image. In the case of Chile and Argentina, the icon took the user to a National Government informative website. Although this information existed, it is important to note that it had no predominance and it was not clearly visible for the user.

Rappi
Colombia

The icon mentioned above is "hidden" outside the home screen in **Rappi** (Colombia).

Rappi (Colombia) had promotional banners with restaurants and supermarkets inviting users to "stay home"; however, the links took the users to stores and products that did not provide additional information of any kind and they were not necessarily related to the pandemic or to essential goods.

Amazon Prime Now
Italy

In the case of Italy, **Amazon Prime Now**, had a pop-up notification that allowed reading the details on the impacts that COVID-19 had had on the service.

Glovo
Argentina

In Argentina, the app **Glovo** added messages for the users during the onboarding process on the home screen "three things to take into account: contactless delivery, avoid queues, avoid cash".

Opportunity areas

Merqueo

Colombia

A rotating banner in **Merqueo** (Colombia) promotes industrial face masks (not suitable for the situation) with poor information.

Takealot

South Africa

Although every South African app and website is obliged to promote information on COVID-19 and a link to a government portal is required, in the case of **Takealot**, an app from this country, the banner can be omitted by the user due to its size and because it is located at the bottom of the screen.

Konga

Nigeria

Another application that opts for displaying a "Stay safe" message is **Konga** (Nigeria); however, it is very small and easy to omit.

Walmart

México

Walmart (Méx) informed the users about the actions to look after their well-being and about changes on delivery times through the use of banners. However, these are not clickable to see more details on the information. The word COVID-19 is not used.

Rappi

LATAM

Although **Rappi** (LATAM) has made efforts, mentioned above as "good practices", to inform about COVID-19, the location of this information changed constantly.

What we found:

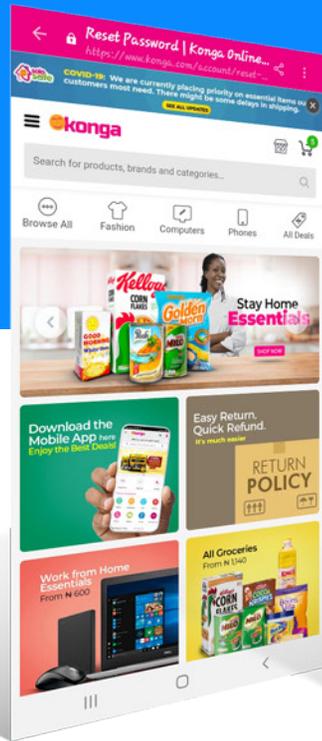
New sections with products considered important or essential, as well as experiences to stay at home.



Baemin

South Korea

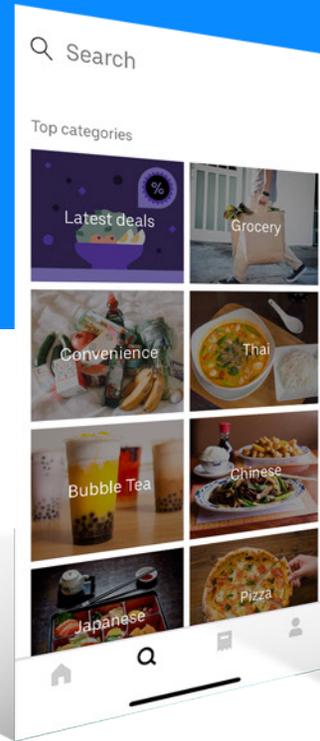
Category that allows ordering small food quantities, thinking about times of crisis.



Konga

Nigeria

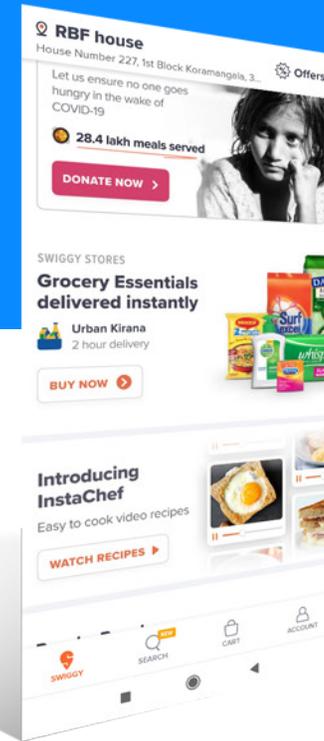
New sections: 'Essentials', 'stay home' and 'Work at home'.



Uber Eats

Australia

New section: Convenience

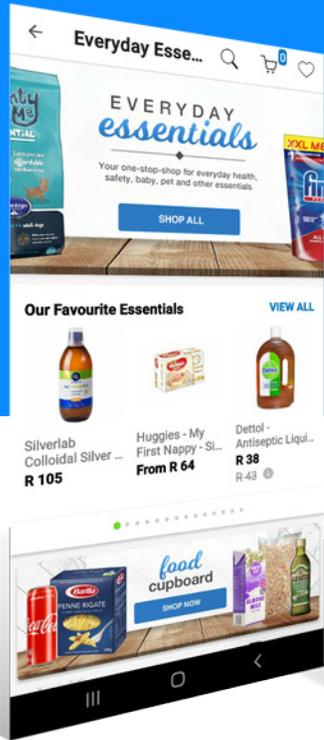


Swiggy

India

New section: essential items

New sections or categories result of the COVID-19 pandemic.



Takealo
South Africa

New section: Essentials. Includes products ranging from food to health items.



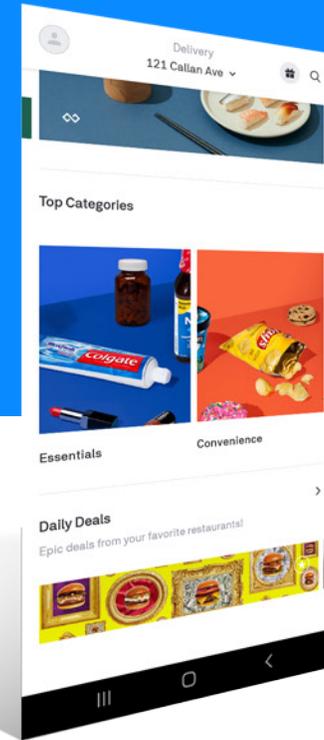
Happy Fresh
Indonesia

New section: "Best thing to do when #stayathome?"



Jumia
Kenya

New section: Stay Safe. Including protective and disinfection products.



Postmates
U.S.

New section: Essentials.

New sections with products considered important or essential to stay at home.

16

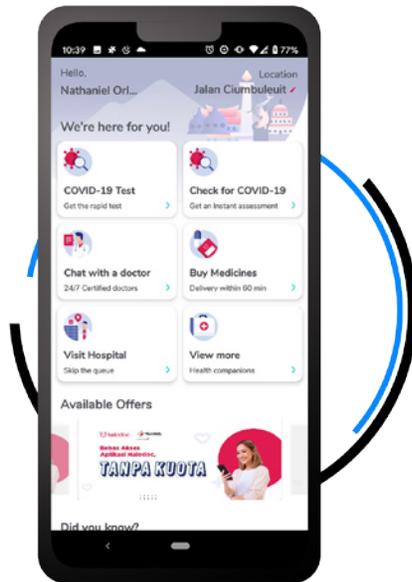
(Sixteen) applications have created new sections or categories to attract the attention of the users towards certain products during the pandemic including essential edible, cleaning and personal hygiene products but are not limited to them; such is the case of [Konga](#) (Nigeria) and [Morrisons](#) (United Kingdom).

The highest-ranked apps in the usefulness attribute were: [Uber Eats](#) (Australia), [Swiggy](#) (India), [Halodoc](#) (Indonesia), [Jumia](#) (Kenya), [Konga](#) (Nigeria) and [Takealot](#) (South Africa).

Very good practices

More than creating a new section, the bet of **Baemin** (South Korea) was the modification of their food and home categories in order to personalize portions or small orders for one person. It had a high usefulness score for a situation in which wasting food is avoided and many people cannot gather to eat.

Good practices



Halodoc, Indonesia

Jumia Kenya / Nigeria

Jumia (Kenia y Nigeria) had a new essentials category, divided into two. The first one includes supplies such as cereals, fruits, cooking oil and even liquors. The "Stay Safe" category included hand soaps, disinfectants, antibacterial gel, face masks, thermometers, tissues and other.

Swiggy India Takealot South Africa

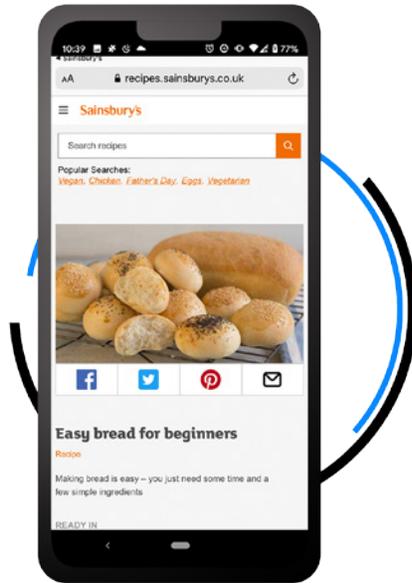
These are similar cases; although the latter had issues with the availability of the offered products. Swiggy displayed new categories as top options.

Gojek Indonesia

Gojek (Indonesia) interfaced with **Haladoc**, an app that offers drugstore items and teleconsultation. In **Gojek**, users can also access to these services in order to have independent health screenings, get medicines and schedule quick COVID-19 tests if necessary.

Uber Eats Australia / Colombia

Uber Eats (Australia, Colombia) incorporated grocery stores under the "Convenience" category, it is not limited to prepared meals anymore.



Sainsbury's, UK

Sainsbury's United Kingdom

It's a supermarket application in the United Kingdom, created new sections in order to generate experiences during home confinement: selling ingredients to prepare specific recipes.

Happy Fresh Indonesia Rappi Colombia

Some applications have similar categories. In the case of **Happy Fresh** (Indonesia), it is called "the best things to stay home" and **Rappi** (Colombia) called it "to prepare home", and it can be found in its "restaurants" section. Additionally they have an "I stay home" section, which includes cleaning and personal care products (face masks and disinfectant products). It is evident that the products are limited.

Morrisons United Kingdom

For its part, **Morrisons** (United Kingdom) created a new section for its new "Food boxes". In such section, it presents five groups of product options for fast delivery preference.

Haladoc Indonesia

The Indonesian application **Haladoc**, that offered drugstore products and telemedicine, had COVID-19-related sections at the time of the research: chats to make quick tests (surveys to assess health, activity and interaction), a section to request a quick test kit and, in addition, an informative segment in that regard. On the other hand, it had a new product sales category called "Prevent Corona" where they offered face masks, medicines and vitamins for the immune system.

Opportunity areas

Uber Eats

Colombia

With regards to the new category called "Convenience" in **Uber Eats** (Colombia), its title in Spanish feels like a literal English translation which does not sound natural. Additionally, in Colombia, there are cities where this section only features snacks and not a suitable variety of supermarket products.

Beamin

South Korea

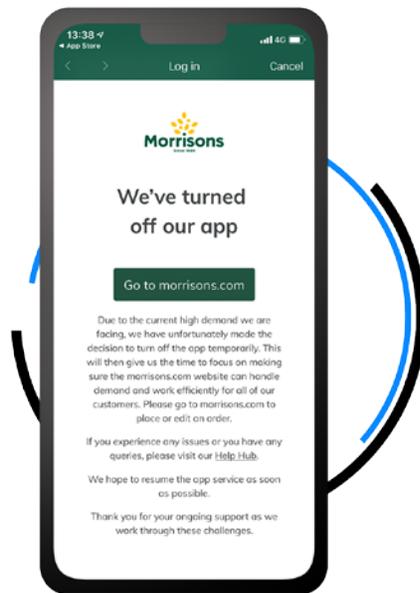
Beamin (South Korea) has a new product category related to antibacterial gel and cleaning supplies. However, this section is located in the menu, at the end of the list; which does not make it accessible.

Postmates

U.S.

In the U.S., the **Postmates** app displayed its new essentials categories in a rotating banner on the home screen. Nevertheless, some products expected to be found in the essentials search, were not there. It did not specify if they were out-of-stock.

What we found:



Morrisons, UK

Modifications regarding the operation of the app.

In the United Kingdom, the **Morrisons** supermarket app had to close. When accessing **Morrisons** (United Kingdom), the user was taken directly to the mobile version of their website, in which there were changes related to the pandemic situation.

It partnered with **Deliveroo**, another delivery app to make fast deliveries. Deliveroo is also working only from the mobile version of its website due to the COVID-19 situation.

Gojek (Indonesia) also had to make modifications to its operation. As mentioned above, the application normally offers transportation services (car, motorcycle); due to the pandemic the service is now suspended and the motorcyclists are now delivery people for their fast food delivery service Gojek (GoFood).



Communication

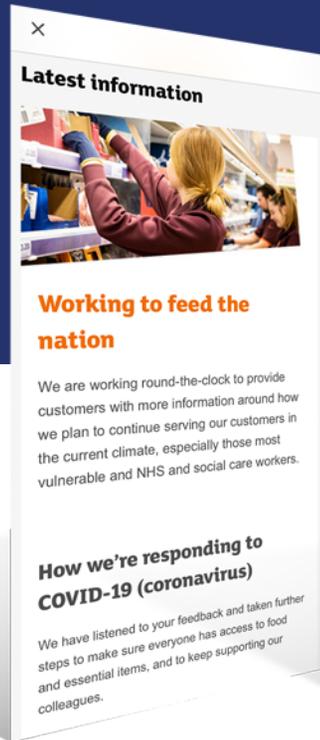
What we found:

"All-in-one" statements and articles.



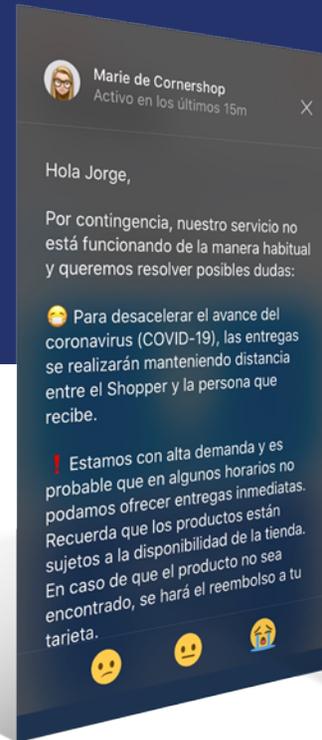
Gojek Indonesia

Mentions focus areas in response to COVID-19. Incorporates a hashtag used by the Government.



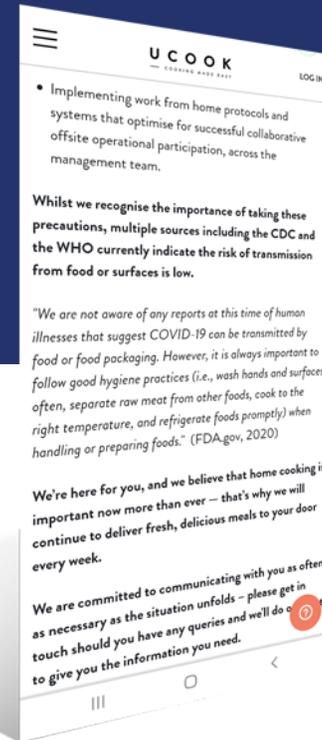
Sainsbury's United Kingdom

The apps announce their commitment with phrases such as "Working to feed the nation".



Cornershop Chile

This statement appears as a notification when accessing the app.



Ucook South Africa

A good practice is citing national or international expert public health bodies.

Examples of statements and articles as a result of the COVID-19 pandemic



11St
South Korea

Provides general recommendations. In the case of masks, redirects to purchase the product.



Instacart
U.S.

Many apps opt for clean texts with no distractions.



Jumia
Kenya

The article gives preference to knowledge about the virus and the health of the user.



Big basket
India

This article is complemented by the FAQ section.

“All-in-one” statements and articles.

67% of the consulted apps have a general statement or article explaining the changes on their service and the decisions made due to the situation.

The extension and coverage of the articles or statements related to the situation vary.

There are 6 essential topics that most apps incorporate into their statements. **Only fourteen (14) apps, 29% of the total**, include other topics that are important to highlight, since they involve more actors of the business ecosystem.

Key topics in statements

- Contactless deliveries.
- Actions to take care of delivery people when making a delivery.
- Supply of health elements for delivery people.
- Delivery delays or difficulties when assigning delivery slots.
- Negative impact on the availability of items.
- What is COVID-19?

Topics that go the extra mile

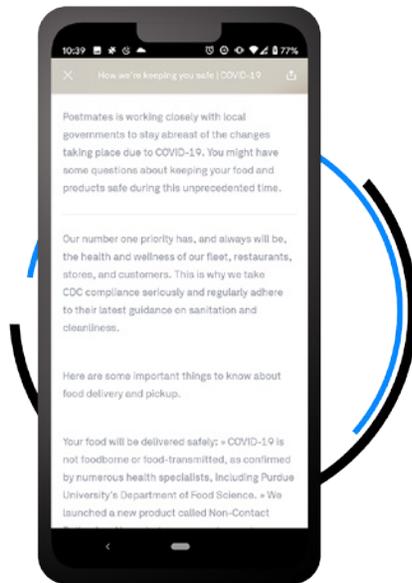
- Health and cleaning cares in affiliated businesses or own warehouses.
- Hygiene measures in food preparation.
- Service priorities for vulnerable individuals and essential workers (state officials, transportation personnel, police, cleaning and security employees among many others).
- Recommendations and information on food deliveries from the World Health Organization and other entities.
- Individual health care. What to do if feeling sick?
- Additional aids offered by the app to delivery people, local businesses, community.

Some apps warn through their statements there will be constant updates

This is the case of **Woolworths** (Australia) or **Big Basket** (India).

Apps like **Gojek** (GoFood) (Indonesia), **Haladoc** (Indonesia), **Jumia** (Nigeria), **Cornershop** (Chile), **11St** (South Korea), **Sainsbury's** (United Kingdom), **Instacart** (U.S.) and **Doordash** (U.S.) were rated with the highest scores in terms of usefulness when communicating the pandemic.

Very good practices



Postmates, U.S.

Swiggy

India

It had a section with Safety Standards to be followed by affiliated restaurants and suggested protocols for consumers, as well as information on contactless deliveries and measures taken for their delivery people. The text covers different topics, however the information tends to be repeated.

11St

South Korea

The application **11St** from South Korea may be the most complete in terms of user recommendations. This application provided information on the use of face masks, food to strengthen the immune system, preventive measures for the public transportation system and the use of disinfecting wipes. **The elements mentioned in the recommendations redirected the user to the product selection screen for its subsequent purchase.**

Morrisons

United Kingdom

It had an extensive FAQ text, which included information on aid to seniors and vulnerable individuals. Likewise, it indicates the user what to do if self-confined. In addition, it mentioned solutions for delivery delays.

Gojek

Indonesia

Gojek (GoFood) in Indonesia, talked about health, protocol changes and even made recommendations on what to do at home.

Ucook

South Africa

Postmates

U.S.

In South Africa, **Ucook** included quotes from the World Health Organization about the low COVID-19 transmission risk through food. In the same way, **Postmates** (U.S.) mentioned the CDC (Center for Disease Control and Prevention) guidelines and their work with local governments. Additionally, it tried to mention all of its ecosystem, letting them know they care for their delivery people, restaurants, stores and customers.

Instacart

U.S.

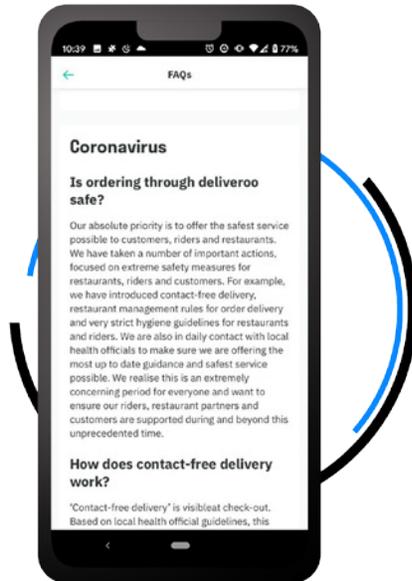
Instacart (U.S.) statement included information on the delivery of groceries, an option to leave the package at the door, inventory impact, purchase limit and availability of products such as antibacterial gel. This information was not explicitly connected to the pandemic.

Deliveroo

Australia

It offered information only through the FAQ section. They mentioned contactless deliveries, new rules for restaurants management and hygiene measures, as well as contact with competent authorities.

Good practices



Deliveroo, Australia

Cornershop Chile

It mentioned COVID-19 from the moment the user accessed the app, through a pop-up where they announced the use of face masks by personnel, highlighted social distancing, high demand of orders, delivery delays and possibly unavailable products.

Amazon Prime Now Italy

Glovo Poland

Also in the shape of pop-ups, **Amazon Prime Now** (Italy) and **Glovo** (Poland) gave information on how the impacts of COVID-19 were being handled. In the case of **Glovo**, such information was brief and communicated with a casual language.

Jumia Kenya

On its general text, it explained what COVID-19 is and how to prevent it. It talked about safety measures and described the population prone to getting infected. It even mentioned ambulance or emergency hotlines for the community. In the facts about COVID-19 section, they explained the low risks of buying through deliveries.

Pyszne Poland

Pyszne (Poland) integrated information regarding safety instructions given to delivery people into their frequently asked questions section. However, since it is such a long section, it was difficult to reach the information related to the pandemic, which is located at the bottom.

Opportunity areas

Some apps such as **Pedidos Ya!** (Argentina), **Uber Eats** (Australia), **The Food Assembly** (Italy) and **Coupang Eats** (South Korea); did not show specific communication related to the pandemic in terms of prevention, care or service changes. **These apps received low scores in terms of usefulness when communicating the context of the pandemic.**

The Food Assembly Italy

With regards to **The Food Assembly** (Italy) the only notification related to the impact of COVID-19 on the delivery of food is sent via e-mail.

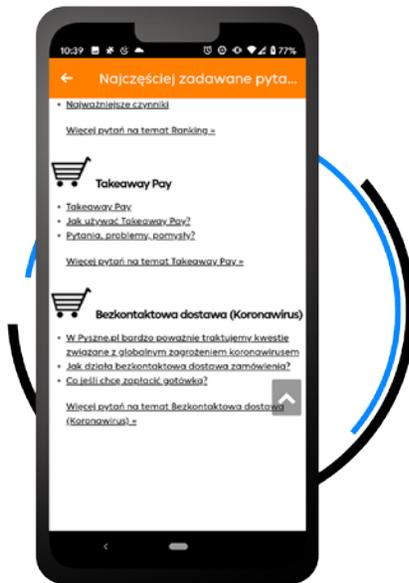
PedidosYa! Argentina

Apps such as **Pedidos Ya!** (Argentina) which did not have a statement or article related to the situation, may be functional, but are far from being at the level of global major apps, in terms of providing peace of mind to users during a crisis.

Rappi Colombia

It was found that **Rappi** (Colombia) had two new dedicated categories where users could buy airline and for massive events tickets, despite the fact that there were restrictions announced by the government, in terms of prohibition of concerts and flights.

Complete but hidden statements



Pyszne, Poland

58% of the reviewed apps keep their statements in the FAQ section, Support section, Resources Center, new sections and articles.

Certain applications, **nine (9)** in total, relied on their websites, social networks and blogs to offer or broaden information that would be looked for inside the application. In South Africa, **Takealot** offered more information on social distancing and health in other web channels, but not inside the app, which is focused on “Stay Home” messages. It is the same case of **Esslunga a Casa** (Italy), which had comprehensive information on the COVID-19 situation in its website.

Most apps, did not attract the attention of the user in the purchase flow in order to take them to statements with relevant information on the situation. For the user, the existence of this information is not evident in all apps.

Good practices

Swiggy (India) had a welcome message to highlight the main measures taken during this situation (Swiggy's key measures to ensure safety), followed by a rotating banner in which they listed protocols in restaurants, contactless purchases among others.

We will later delve deeper into other applications with good practices in terms of the use of their home screen.

Opportunity areas

The following applications lack of instructions so that the user can access such information, without having to navigate and investigate on their own out of the service flow.

Having information to communicate and not integrating it into the app -or the purchase flow, as it will be shown later- and in turn delegating it to other channels such as social networks, websites and mass media is a setback. Information is necessary and it must be accessible for users that go to the application for a particular need. Such is the case of [Rappi](#) (Colombia) since the information regarding disinfection points for delivery people, contactless delivery robots or measures for restaurants does not always reach the end consumer.

Thuisbezorgd

Netherlands

Throughout the navigation there was no information on COVID-19 or on the measures taken. In order to obtain more information in this regard, the user had to go to the "I need help" section. Likewise, Doordash (U.S.) although having robust information on its actions against COVID-19, limited its visibility to users that go to the "Help" section.

Happy Fresh

Indonesia

Had information in a section of difficult access for the user (FAQ).

Uber Eats

Colombia

There was no similar information at the time of this project's review. A month later, it integrated information on COVID-19: A Safety Center that offers more information in a blog, outside the app. The Uber Eats versions in Mexico and Australia were not very accessible either for the user in this regard.

Rappi

Colombia

Had an article with information on COVID-19 prevention in its FAQ section. This information could only be accessed through the "Help" and "Frequently Asked Questions" sections, or through an external link that led to a Government website.

What we found:

Mentioning the pandemic implicitly and with closeness.



Amazon Prime Now

Italy

Without using words such as COVID-19 or Pandemic, they talked about health as a priority.



Glovo

Argentina

Positive messages are used: "Count on Glovo now more than ever" It mentions social distancing measures in stores.



Glovo

Poland

"We keep working". They mention a change on sealed packages.

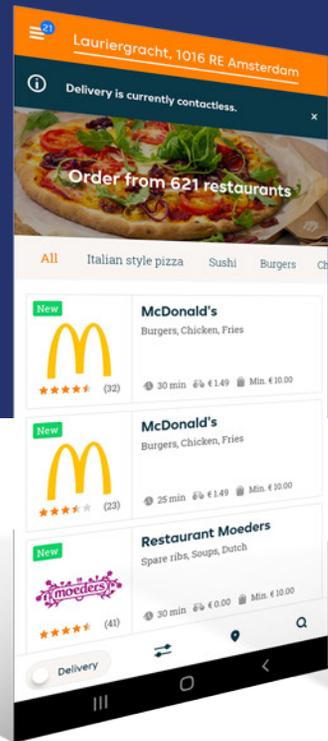


Woolworths

Australia

Messages such as "Helping those who need it most" are used in this case.

Texts and images that relate the pandemic without mentioning it.



Thuisbezorgd

Netherlands

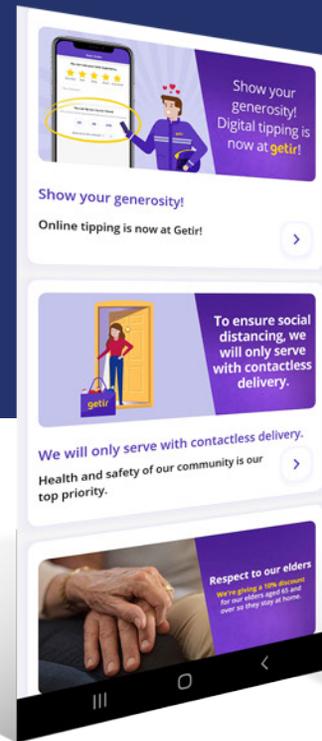
Many apps just offer contactless deliveries referring to the context.



Uber Eats

Poland

Chosen messages: "This is how we protect you and the community".



Getir

Turkey

Refers to social distancing, care for seniors and generous tips.



The Food Assembly

Italy

Uses the term "Emergency Situation" to refer to the circumstances.

Mentioning the pandemic implicitly and with closeness.

In general, most applications avoided a tone of alarm or worry. The use of questions and answers is common in order to provide closeness, as well as phrases inviting users to stay home.

The use of phrases, hashtags, easy references for customers. Out of 47 reviewed apps, 89% referred to the pandemic without directly mentioning it. They opted for related messages, avoiding words such as Coronavirus, COVID-19 or similar from their home screens.

Common places: most used phrases

'Stay Home'

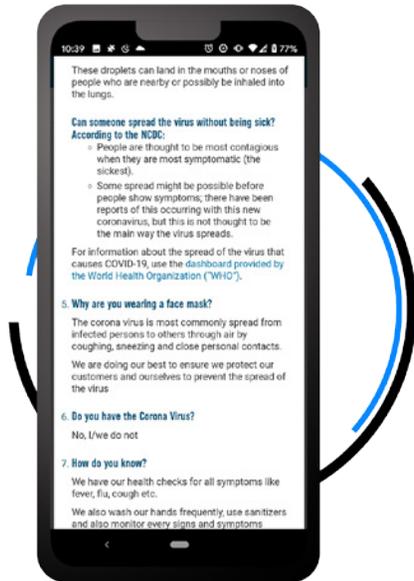
'Our main concern is your safety'

'Emergency Situation'

"Contactless deliveries"

Most applications tended to use a close and warm speech, focused on their interest in supporting the situation.

Good practices



Domino's, Nigeria

Postmates U.S.

Opted for using blunt statements in order to give piece of mind to their users: "How we're keeping you safe", "Your food will be delivered safely".

The app used certain tone of exclusivity in phrases like: "We launched a new product called Non Contact-Deliveries" even though it is a popular service among most applications.

Domino's Nigeria

In the case of Domino's (Nigeria) the tone of the questions and answers changed notoriously to talk with ease and openly about the topic.

- "Do you have the Coronavirus?"
- "No, we don't"
- "How do you know?"
- [Answer about screenings]
- "Are you saying that I have Coronavirus?"

The result is a text, at times funny, that went straight to the point.

Gojek Indonesia

The Indonesian application **Gojek** (GoFood) used the hashtag #DirumahAja (JustAtHome) which was popularized by the Government and integrated it to its home screen communication.

Opportunity areas

In the case of **Cornershop** (Mexico and Chile) the welcome message talked about the impact of the pandemic and the decisions made by the app. The user was able to react with emojis; however, all of them are sad. Although the text's goal is to give peace of mind to the user, the emojis to be picked change the tone of the reading.



C R A S A U B E B I D A
5 0 E M L .

Product selection



What we found:

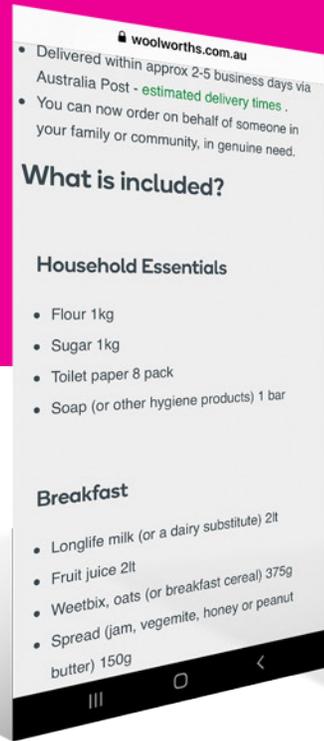
Discounts in times of crisis



11St.

South Korea

Announces selling articles that were not sold at a low cost.



Woolworths

Australia

Packages with goods at a lower cost.



Big Basket

India

10% discount on essential products.

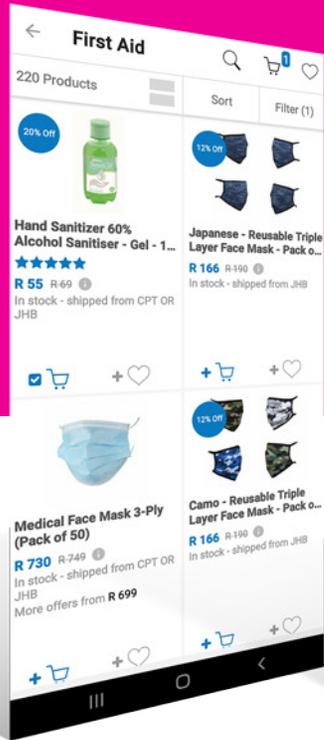


Merqueo

Colombia

Discount on antibacterial gel.

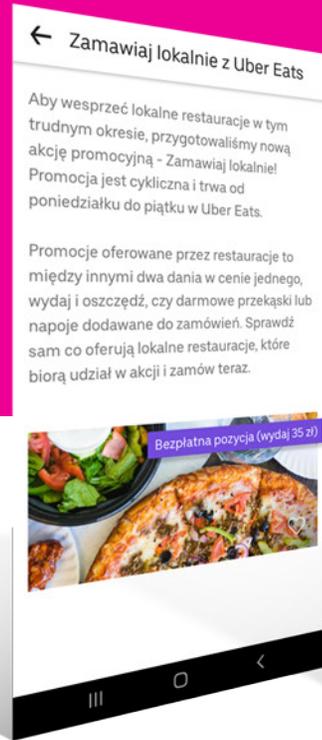
Some product list examples



Takealot

South Africa

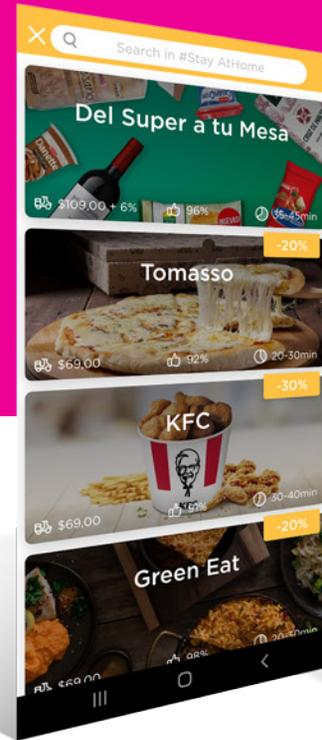
Discounts on face masks.



Uber Eats

Poland

Promotes orders from local restaurants.



Glovo

Argentina

20%-30% discounts on the #StayAtHome section.



Konga

Nigeria

Special promo code during the pandemic.

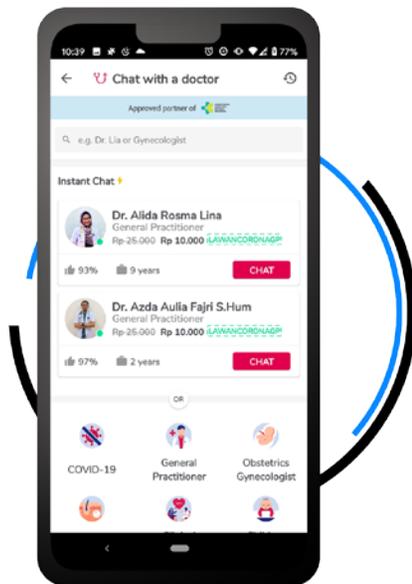
Discounts in times of crisis

Ten (10) applications were concerned about reducing their prices for the users.

In addition to the frequent discounts promoted by the apps, the ones linked to the Coronavirus were very specific and ranged from health protection products to the possibility to get free access to an application.

The only application that has had a price increase is **The Food Assembly**, from Italy.

Very good practices



Halodoc, Indonesia

The internet access to use the Indonesian app **Haladoc** was free.

There were discounts in drugstore products and teleconsultation.

In the case of **11St** from South Korea, they offered discounts in special sales of small local business through discount coupons. It promoted the purchase of **items that were not sold due to cancelled events or that could not be sent to other destinations.**

Good practices

Woolworths

Australia

Woolworths (Australia) offered boxes with supplies at a lower price. Likewise, **Big Basket** (India) did so with a 10% discount on essential products.

Big Basket

India

Merqueo

Colombia

Merqueo (Colombia) offered discounts on antibacterial gel, while the South African application, **Takealot**, had discounts on face masks.

Takealot

South Africa

Uber Eats

Poland

In Poland, **Uber Eats** promoted orders from local restaurants with BOGO (Buy One Get One Free) discounts, free snacks or beverages with the orders.

Glovo

Argentina

Glovo (Argentina) announces 20% and 30% discounts on their Stay at home section.

Konga

Nigeria

Provided a promo code for purchases. However, it failed at being used.

Amazon Prime Now

Italy

Although not explicit in the application, **Amazon Prime Now** (Italy) informed users on its website that it "would fight against the price increase, as it has always done it in the past".

Opportunity areas

Despite being in the good practices segment, **Glovo** (Argentina) did not apply the same discounts to products considered essential.

What we found:

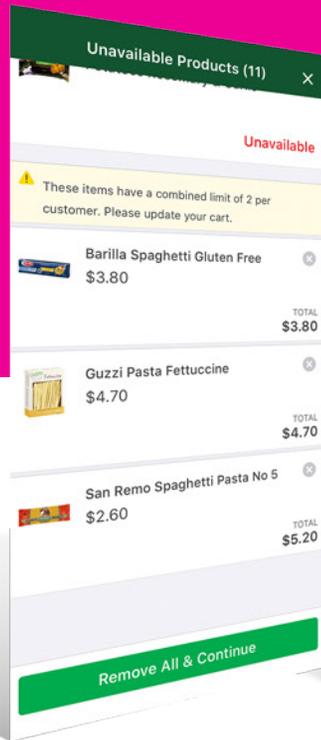
Out-of-stock products, most of them with no clear information



Coupang Eats

South Korea

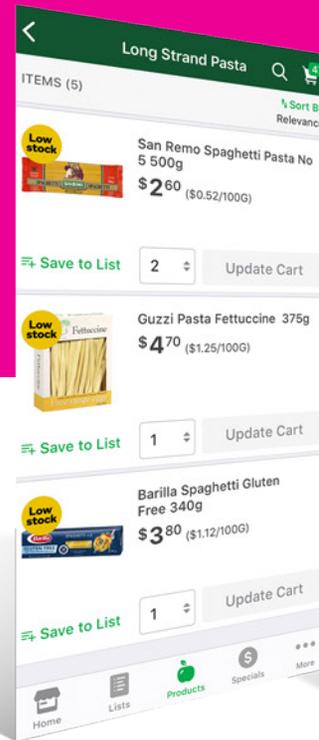
Announces that, at the moment, there is a product out of stock.



Woolworths

Australia

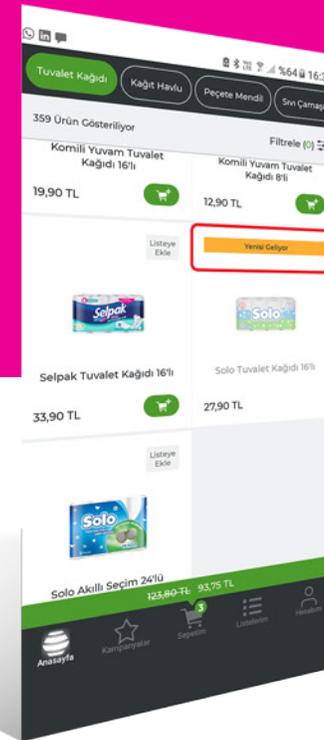
Announces the number of items that can be purchased per customer.



Woolworths

Australia

Displays low-stock products when making the product selection.



Istegelsin

Turkey

Announces there will be new products available soon.

Out-of-stock products, most of them with no clear information

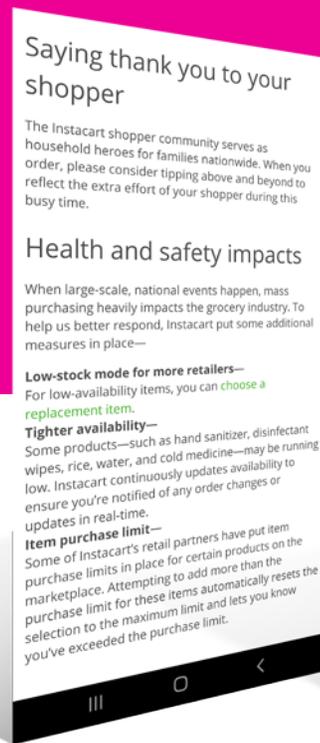
Comunicación con el cliente sobre disponibilidad de productos.



Esselunga a casa

Italy

Displays low-stock products when making the product selection.



Instacart

U.S.

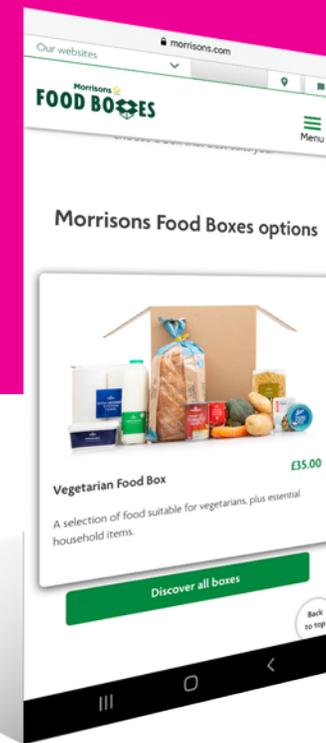
Articles include the limit of products that will be automatically removed.



Amazon Prime Now

Italy

A text explains the product limit per purchase.



Morrisons

United Kingdom

An alternative to limit the purchases of products were boxes with selected items.

Out-of-stock products with no clear information

Only one (1) application explicitly announced out-of-stock products on the day of the inquiry, **Coupang Eats** (South Korea). **Other four (4) showed a shortage of products without making it explicit.** That is to say, the user identified there is no stock because the product was not found, not because the application let the user know.

- **Pedidos ya!** (Argentina): face masks, rubbing alcohol and protective elements.
- **Cornershop** (Mexico): soap, eggs.
- **Banabi** (Turkey): toilet paper, cologne, pasta.
- **Big Basket** (India): snacks, trash bags and prepared meals.

In most applications it is not possible to know when there is a low stock. Just a few show such shortage.

Although the limitation of some products was clear and most confirmed this was seen until the end of the purchase, contrary to what may seem a waste of time for the user, most rated the action with a medium usefulness level: not useless but not positively surprised.

In the United Kingdom, at the beginning of the outbreak, the scarcity of flour, pasta, rice and toilet paper was evident. Supermarkets opted to show less product options and improve the stock flow.

Good practices



Glovo, Argentina

Happy Fresh

Indonesia

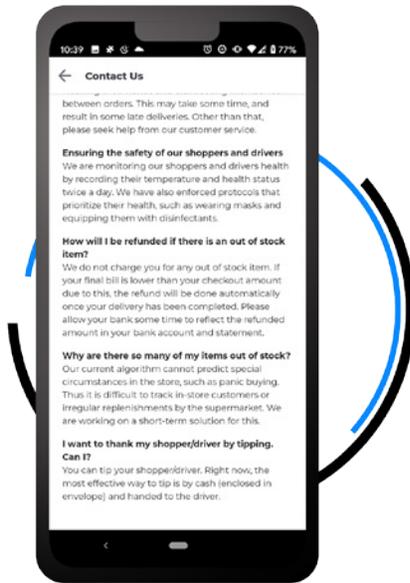
Although not a sufficient measure- it was transparent informing that its algorithm couldn't predict circumstances such as panic purchases in the store and that there were difficulties keeping track of the inventory in the stores. Just at the moment of the purchase, the shopper will notify unavailable products. This information is found in the Frequently Asked Questions section.

Glovo

Argentina

A similar case was that of **Glovo** (Argentina) that informed there may be unavailable products, and provided information on the next steps to handle the issue. In the case of this app, this information is provided in a striking notification at the beginning of the user experience.

Opportunity areas



Happy Fresh, Indonesia

Sainsbury's United Kingdom

The supermarket application Sainsbury's in the United Kingdom, did not inform beforehand if there was a product out of stock at the time of the selection. It could only be seen at check-out.

Morrisons Argentina

In the case of **Morrisons**, also from the united Kingdom, the shortage of a product could only be confirmed upon delivery.

Albert Heijn Netherlands

In the app **Albert Heijn** (Netherlands) there was a shortage possibility, but it was not shown in the app, it was shown on the website. It could be any item, related to excessive purchases in the app.

Uber Eats Colombia Mexico

There were many restaurants that appeared as unavailable (not closed due to business hours). On the other hand, in Colombia some restaurants also notify a greater number of food products that are out of stock. It is not explicit if this is related to closure and availability due to the COVID-19 crisis.

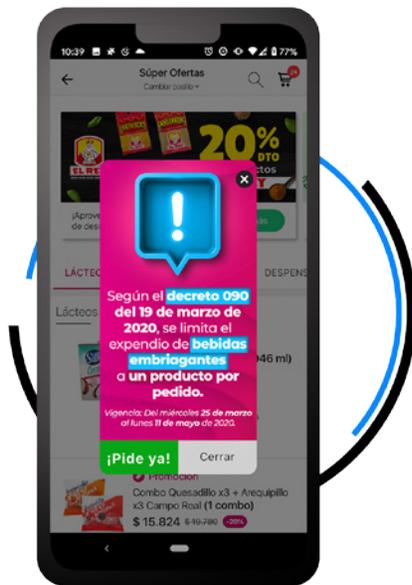
How much is the user allowed to buy?

What we found:

The high demand and panic purchases at the beginning of the pandemic forced **twelve (12)** of the reviewed apps to restrict user purchases. It is important to note that, most did not notify the customer until reaching the check-out or when the user flow stopped.

Apparently, in most applications there was no limit of products to select.

Good practices



Merqueo, Colombia

Morrisons United Kingdom

Had a 3-item limit policy for specific products per customer. In addition, there was a new “standard food boxes” option to facilitate product selection and have faster delivery times.

Woolworths Australia Takealot South Africa

Is one of the few applications, along with [Takealot](#) (South Africa), that notified the user there were few units left in stock at the time of selecting a product. If the users exceeded the limit, they were requested to remove a specific number of items at check-out.

Esselunga a casa Italy

Was clear about the limit of one order per week. In addition, they reserved 40% of the available delivery slots for people with disabilities.

Takealot South Africa

Is a particular case. It did not inform on the limit of products although it restricted the purchase of some essential products to a maximum of five. This information was on their website, not in the app.

Big Basket India

This app had a limit of maximum four per order in most items. Some of them were even limited to 3 or 10.

Instacart

U.S.

In the case of the U.S., stores were restricted to a number of purchases, but this was not reflected in apps such as [Instacart](#). The “Help” article stated that the app would automatically change the number of articles if needed, but this was not shown.

Amazon Prime Now

Italy

In the case of Italy, [Amazon Prime Now](#), had a limit of orders per week per account. Despite the importance of that limit, people normally used several accounts to place orders and omit the rule. In this app there were also certain products limited to **three (3)**.

Sainsbury's

United Kingdom

[Sainsbury's](#), supermarket app from the United Kingdom, had a different approach to the limitation of products. Instead of reducing the number of products per purchase, they lifted the restriction to encourage people to buy for more people (neighbors, relatives and others in need).

Opportunity areas

Happy Fresh

Indonesia

While the user made the purchase there was no product limit information. However, the app did have restrictions when exceeding certain amount. This happened with items such as oil, rice or sugar.

Cornershop

Mexico

Although the application **Cornershop** (Mexico) did not have limits for the number of products, some stores and affiliated businesses did. The user became aware of the limit only when the shopper communicated at the time of purchase in the store.

Merqueo

Colombia

Only limited the number of alcoholic drinks to one per order, according to measures requested by the State. There was no limit for other products considered essential.

Walmart

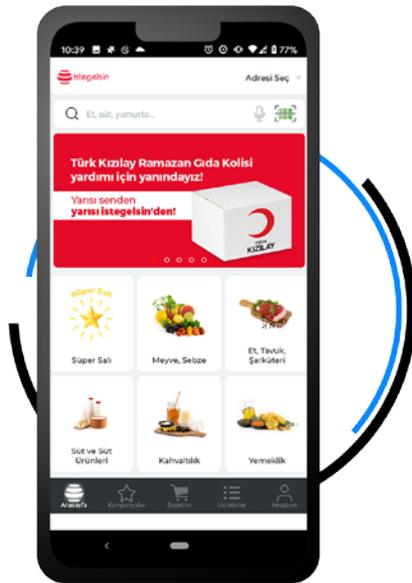
Mexico

Had a product limit. However, the user could try to add the same kind of product from different brands. The user who attempted this, found out at the cart that the app asked to change the selected number of units.

Baemin

South Korea

In the case of **Baemin**, from South Korea, there was a limit of 10 purchases per menu. However, there was no limit for the number of orders that could be placed in a restaurant. Regarding groceries, up to 10 purchases per day could be made. The limits varied for each product, but the application was not clear about the criteria.



Istengelsin, Turkey

Halodoc
Indonesia

The customer was able to add products, but wasn't allowed to go to the check-out if the number was not reduced.

Cornershop
Chile

Encouraged customers to ask their old age neighbors about their needs and include the items they required in their next order with the purpose of avoiding crowds in stores.

Four (4) applications had a different approach to restrictions per product, since they encouraged customers to order big amounts to get to more people with less deliveries.

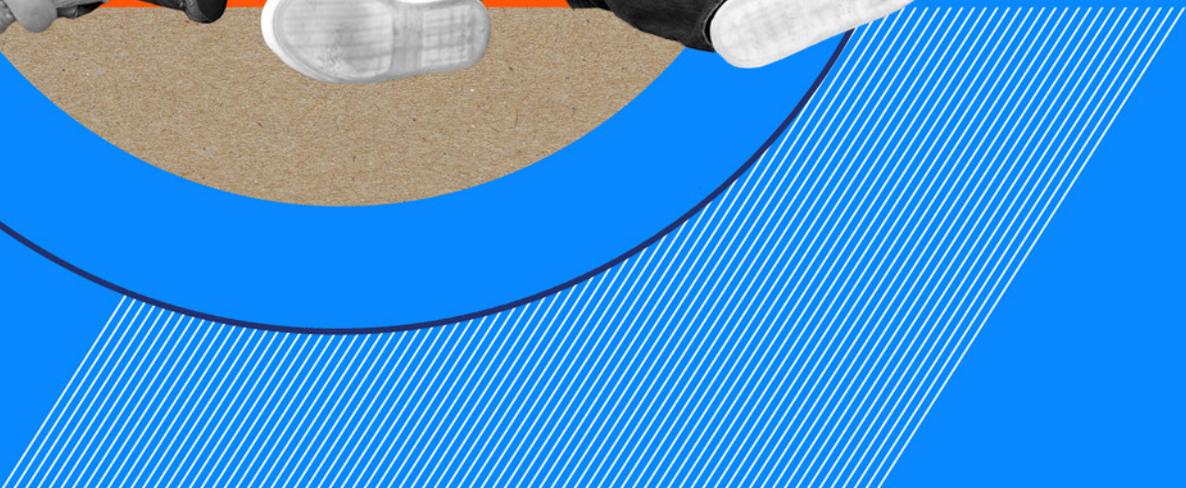
It was the case of **Getir** (Turkey), **Istengelsin** (Turkey) and **Woolworth's** (Australia). In the case of **Istengelsin**, they advocated for specifically buying food boxes for the Ramadan*, destined for populations in need.

*Holy month of the Muslim tradition which commemorates the revelation of the Quran (their holy book) to Mohammed. It is relevant to know that for this celebration, nothing can be eaten or drunk during the day. In order to perform this fast, Muslims eat before 4 am., and at nights during an act of congregation. The COVID-19 pandemic times restrict not only the collective act, but the acquisition of food to break the fast and keep the body strong for such practice.

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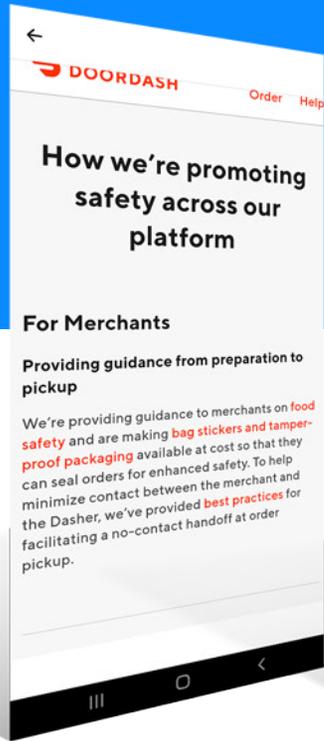


Care and empathy actions



What we found:

Few applications informed users about health measures in associated and own businesses.



Doordash

U.S.

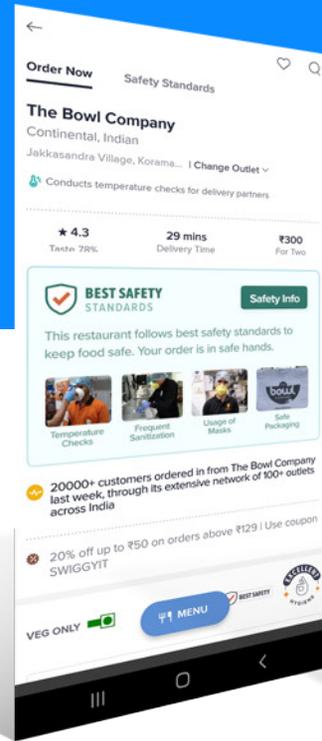
Provides tamper-proof stickers and informs businesses on best practices.



Zomato

India

Has a section with protocols and ratings for affiliated restaurants.



Swiggy

India

Grants badges to restaurants that follow their safety standards



Baemin

South Korea

Mentions sterilization processes in restaurants and face masks for employees.

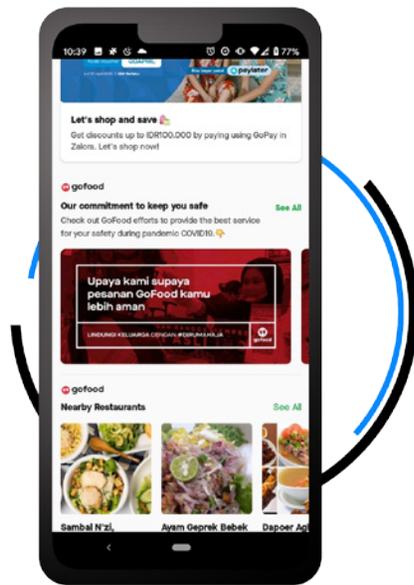
Few applications informed users about health measures in associated and own businesses.

Just **nine (9)** applications communicated these kind of measures to look after their affiliated stores or restaurants. With regards to those applications that have warehouses, supermarkets or own stores, there was even less information on that regard.

The highest-ranked application regarding usefulness of safety protocol communication with affiliated businesses was **Gojek** (GoFood) from Indonesia.

It must be taken into account that in the case of **The Food Assembly** from Italy, affiliated businesses were normally peasants that usually didn't communicate these measures to the application.

Very good practices



Gojek, Indonesia

The only applications that had a guarantee mark, where the customer could visibly know if protocols were being followed are both from India:

Zomato India

Had a specific section with protocols for affiliated restaurants such as mandatory temperature screenings, cleaning and the use of face masks. **In their restaurants section, they showed the rating of the restaurants that best follow these protocols and how they were doing so.**

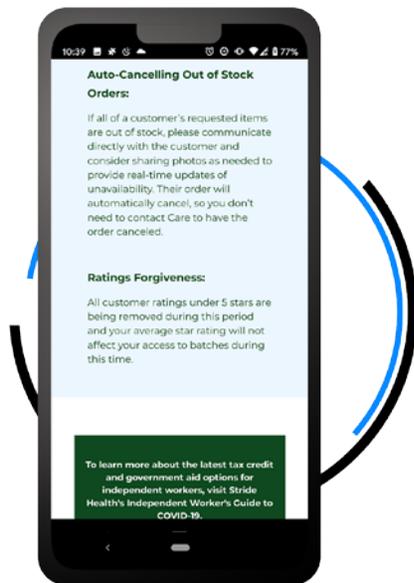
Swiggy India

Had a safety standards section that talked about mandatory measures for their affiliated restaurants: temperature screenings, use of face masks, cleaning procedures and health standards. **A badge identified those businesses that properly followed the measures, so that customers could recognize them at the time of selecting the food.**

Gojek Indonesia

Likewise, Gojek (Indonesia) in its **Gofood** service had protocols for partner restaurants where they required chefs to wear a face mask at all times, control body temperature, disinfect their kitchens and constantly wash their hands.

Good practices



Instacart, U.S.

Morrisons United Kingdom

Is one of the few applications that mentioned cleaning protocols in own stores. This information was found in the Frequently Asked Questions section.

UCook South Africa

Mentioned information about strategies with suppliers and affiliated stores.

Uber Eats Mexico

Stated being committed to identifying restaurants and service providers infected or at risk, in order to stop their activities and report them to state authorities.

Pyszne Glovo Poland

In Poland, both **Pyszne** and **Glovo** were committed to look after their delivery people, the latter claims following the recommendations of the Ministry of Health.

There were only two (2) app cases that involved affiliated businesses to look after shoppers and delivery people:

Thuisbezorgd Netherlands

Asked the stores to provide hand sanitizer for them.

Instacart U.S.

Asked some of its affiliated stores to let their shoppers avoid long lines or to only allow them to enter.

Opportunity areas

Gojek Indonesia

Shared important information on health protocols with restaurants, **said information was found in the articles section, which was not easy to access for the users.**

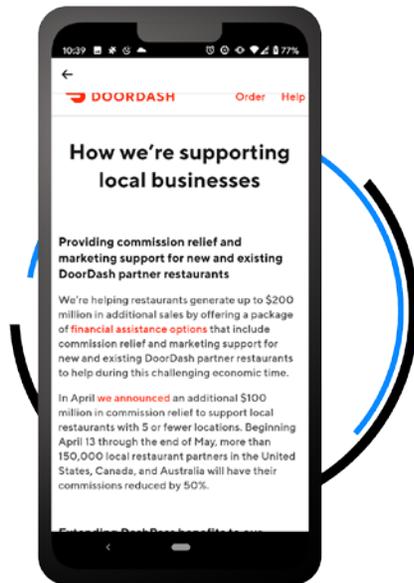
Baemin South Korea

In the case of **Baemin** (South Korea) this information was responsibility of the restaurant in its corresponding section. Most did not provide this information.

Amazon Prime Now Italy

Did not mention cleaning protocols in affiliated businesses, but this information was found on the website.

In general, applications couldn't ensure the customer, the businesses complied or not with said measures. Those who own warehouses or stores did not talk about their disinfection.



Doordash, U.S.

What we found

Apps that looked after their affiliated businesses

In addition to health protocols, **only six (6)** applications created strategies to look after the wallets of their affiliated businesses. Apps mostly supported restaurants and local entrepreneurships.

Very good practices

Uber Eats

Poland

Eliminated the activation fee that was charged to new restaurants in the platform. Likewise, it set the possibility to change the weekly payment to daily.

Gojek

Indonesia

Offered sales coupons from some local brands, which could be used by the customers after the pandemic. They claimed this was the way to support and avoid their economic crisis.

In addition, **Gojek** worked with some associated restaurants that offered low-price menus that customers could buy for delivery people.

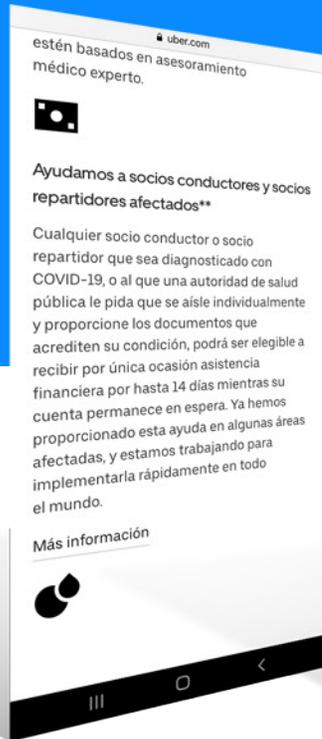
In Australia many restaurants were also working behind closed doors, that is, only for the delivery option. Thus keeping the variety of products available for users.

In the case of **Doordash** (U.S.), it had the greatest support for affiliated businesses and it even announced it in the banners located in the home screen: We're helping local restaurants earn more.

- Businesses could receive a relief for the commission they pay to **Doordash**, who announced reductions of up to 50% so that business could increase their sales.
- They supported local businesses with communication and marketing strategies. They created a resource center with that purpose.
- They extended their DashPass service to more local restaurants so that they could offer free deliveries. This service was offered for thirty (30) days with no payment.
- To those already subscribed to their DashPass service, they reduced the amount to be paid.
- Workers of affiliated businesses, had priority to become delivery people.
- They supported local restaurants that continued working behind closed doors with the hashtag #OpenForDelivery.

What we found:

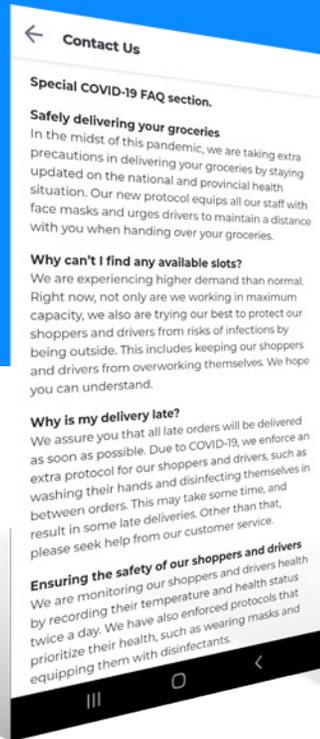
Taking care of delivery people: protocols that few communicated.



Uber Eats

Colombia, Chile and Mexico

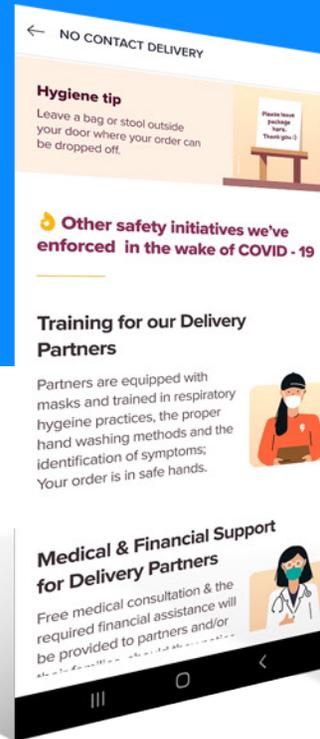
14-day economic support for delivery people affected by COVID-19.



Happy Fresh

Indonesia

Insists on the protection of delivery people and shoppers.



Swiggy

India

Trains delivery people on hygiene and early symptoms detection.



Glovo

Poland

Offered economic support for people affected by COVID-19. This information was only available on the website.

Some protocol communication examples.



Instacart

U.S.

Tracks the health of delivery people and shoppers through routine questions.



Takealot

South Africa

Asks delivery people to spray the customers' hands with rubbing alcohol after the delivery.



Pyszne

Poland

Mentions health instructions for delivery people in the FAQ section.



Doordash

U.S.

Has financial aids for delivery people affected by COVID-19.

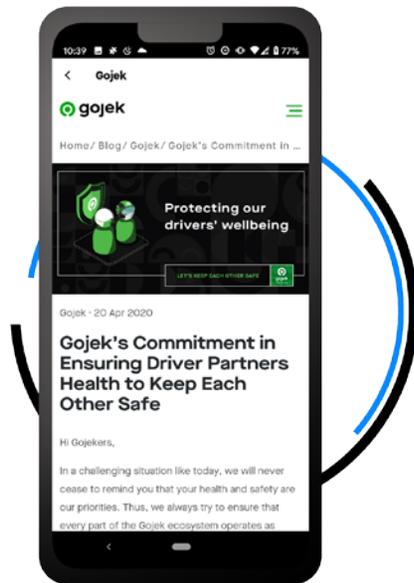
Taking care of delivery people: protocols that few communicated

Beyond providing protective elements -which were mentioned when talking about the delivery processes-, only a **few applications established health standards and protocols for their delivery people and communicated them through their platforms.** Only eight (8) applications were identified.

The applications that worked in that sense, laid out these protocols on their own initiative. They did not mention if they were following any regulations set out by a public entity.

It was known that **other applications may have created similar strategies, however they communicated this information through external channels,** channels the end user did not necessarily access and that were outside the purchase flow, which is why they were not considered in this count.

Very good practices



Gojek, Indonesia

Gojek Happy Fresh Indonesia

Gojek and Happy Fresh (Indonesia) were fairly insistent regarding the protection of their delivery people and shoppers. **Gojek** had its drivers as priority and they did so explicitly, they even **shared pictures as evidence** in a specific section of the app. They highlighted the following measures:

- Constant cleaning and disinfection of their vehicles.
- Temperature screenings in different points of the city
- Cleaning hands before and after a delivery.
- Symptoms detection training.

Gojek was precisely one of the few apps that had considered a public insurance plan, before the pandemic for its delivery people.

Swiggy India

Trained its delivery people on hygiene and early detection of symptoms.

Instacart U.S.

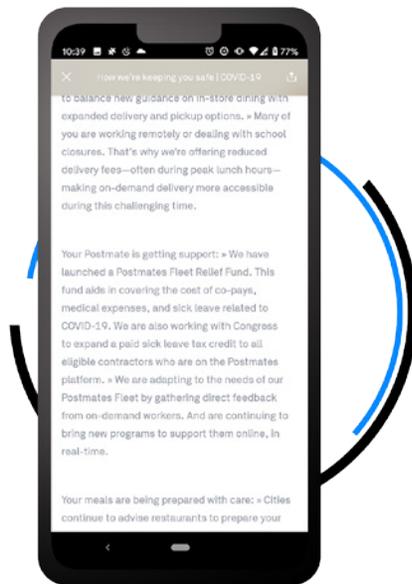
Tracked the health of their delivery people through daily questions regarding their health. In this way they updated the status of each one, before they went shopping.

Takealot South Africa

Asked delivery people to spray the customer's hands with alcohol after the delivery.

Pyszne Poland

For its part, **Pyszne** (Poland) explicitly communicated, in the Frequently Asked Questions section, the health instructions given to delivery people and suppliers, not only in terms of protective elements, but also in terms of detergents to clean delivery implements. Also in this country, Glovo had a specific section with delivery recommendations for delivery people and how to protect themselves when picking up the order in the businesses.



Postmates, U.S.

It is important to highlight that **five (5) applications, 11% of the total, offered economic support for their delivery people, specifically related to the impact of COVID-19.**

The case of **Postmates** in the U.S., is the most comprehensive since:

- **They announced a recovery fund** for copays of medical expenses and drugstore items for delivery people that could need the money in terms of prevention or health coverage when diagnosed with COVID-19.
- **They worked with the Congress** to extend a fiscal credit for paid illness leave.
- Claimed the whole adaptation process **took into account comments, requests and feedback from their fleet of delivery people.**

Good practices

Uber Eats, in Colombia and Mexico, economically supported delivery people affected by COVID-19 for 14 days and that had proof of their diagnosis issued by an authorized health institution.

The applications reviewed in the United States, **Doordash**, **Postmates** and **Instacart**, had financial aids for delivery people diagnosed with COVID19.

Glovo (Poland) also offered economic support for delivery people diagnosed with COVID-19. However, this information could not be found in the application, but on their website.

Swiggy (India) offered medical and financial support, not only to delivery people, but also to their families if they noticed symptoms associated with COVID-19.

Opportunity areas

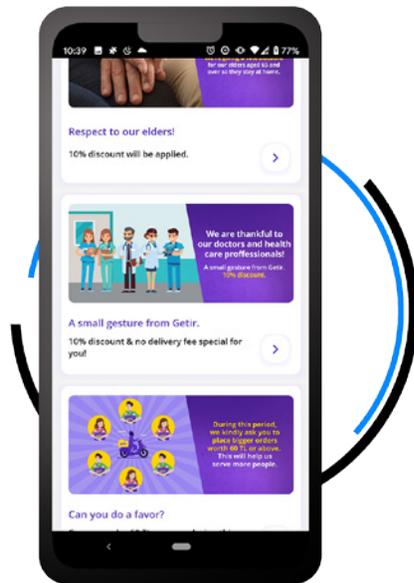
In general, most applications did not have additional cares for their delivery people in terms of health assurance beyond prevention with protective elements or, if they did, they didn't socialize them.

**Customers
requiring
priority:
discounts and
easy access to
app services.**

What we found:

Seniors, essential workers, health personnel and vulnerable people were the stakeholders that some applications seek to offer priority in their services.

Very good practices



Getir, Turkey

Getir Turkey

The **Getir** app, gave people over 65 a 10% discount, and 10% discount plus free delivery for health workers. What they called “a little gesture, from Getir”.

Istegelsin Turkey

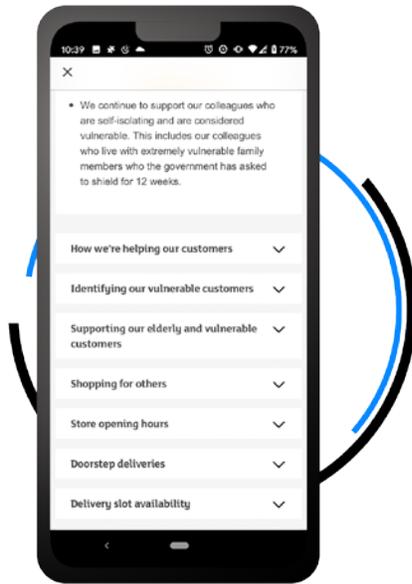
For its part, the Turkish app **Istegelsin**, also offered free delivery for seniors, who had a prohibition to go out in such country during the period of time of this research.

Sainsbury's United Kingdom

Sainsbury's, supermarket app from the United Kingdom, made an effort to give service preference to vulnerable citizens and essential workers with priority in the allocation of delivery slots.

Esselunga en casa Italy

Offered benefits such as free delivery for people over 65 or with disabilities, and 40% of the delivery slots are reserved for them. In order to do so, the apps requested certain information from the users. However, this benefit could not be found in the application, but on their website.



Sainsbury's, United Kingdom

Morrisons United Kingdom

Enabled a hotline for seniors and another for non-digital population so that they could make use of delivery services.

Woolworths Australia

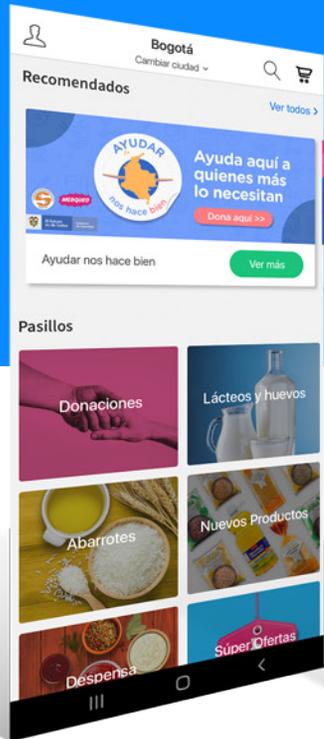
Set delivery windows and priority for seniors, health personnel and vulnerable individuals. They were also interested in knowing if the user had a special need, such as being self-confined or unwell. They did not explicitly mention the word COVID-19 in this case. They requested some type of evidence from people considered as priority, for example: a document for seniors.

Sainsbury's United Kingdom

claimed granting priority access for a vulnerable segment of the population in the United Kingdom. However, it is important to take into account that it is possible that this population did not have access to the app or did not make use of these services.

What we found:

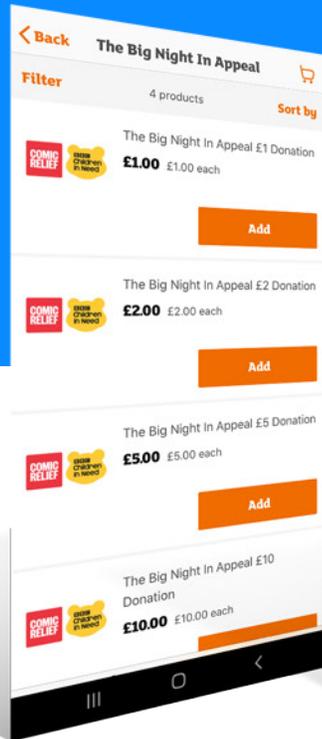
Community support: donations and social initiatives



Merqueo

Colombia

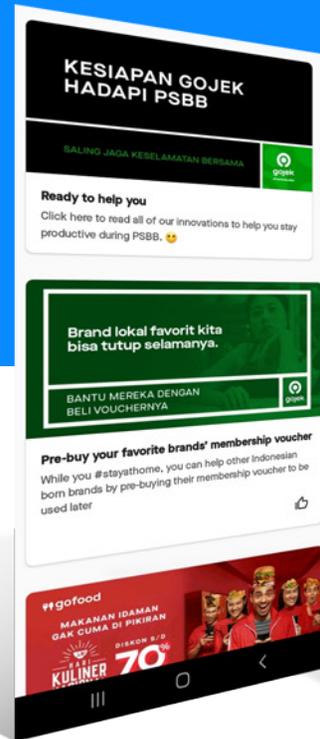
Social initiatives unrelated to the pandemic are shown.



Sainsbury's

United Kingdom

Special section for donations in conjunction with organizations.



Gojek

Indonesia

Invites customers to make donations for partners of the restaurants sector.

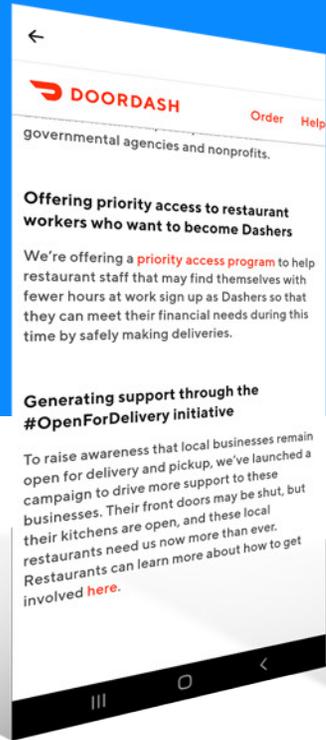


Swiggy

India

Has a donations fund to feed vulnerable individuals.

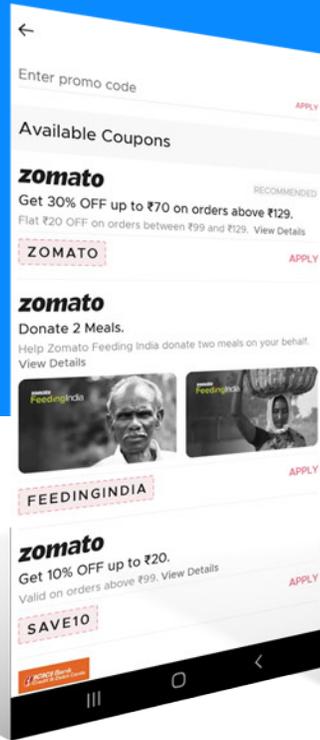
Some examples of social initiatives



Doordash

U.S.

Promotes supporting local restaurants that only make deliveries.



Zomato

India

Encourages customers make a donation to an aid fund.



11 St.

South Korea

Makes donations for every "encouraging comment" in the app.



UCook

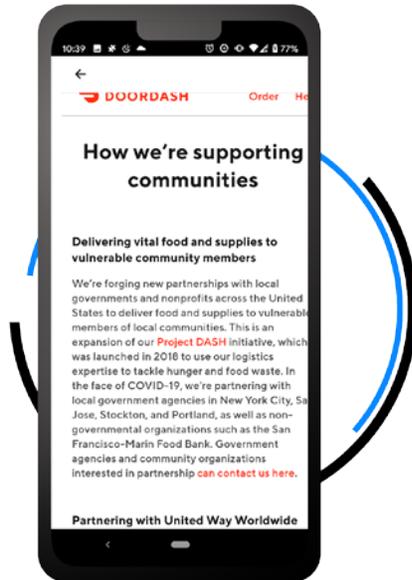
South Africa

Donations bank to fight against hunger in the country.

Community support: donations and social initiatives

29% of the applications had social initiatives to help vulnerable individuals. Out of that percentage, only **12%** explicitly stated their initiative was related to the pandemic.

Good practices



Doordash, U.S.

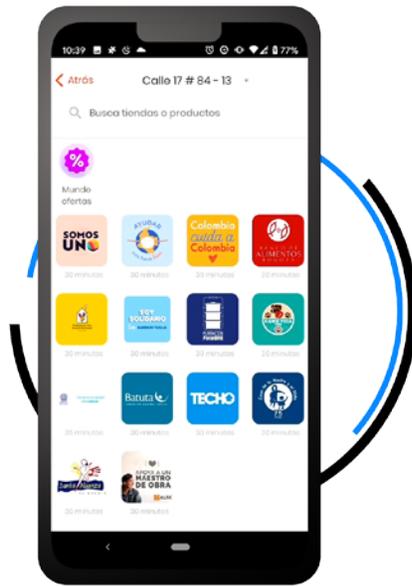
Esselunga a cassa (Italy) donated 2.5 million Euros to hospitals and institutions directly committed to patients and scientific research.

Doordash (U.S.) is an app that was involved in three initiatives to support different communities and affected sectors.

- #Openfordelivery. Initiative that encouraged customers to support local restaurants that work behind closed doors and only offer deliveries. Directly related to the pandemic.
- Project Dash. Program that supported vulnerable local communities on their fight against hunger and food waste. Doordash was committed to donate food per placed order and to gather restaurants for this project.
- Jointly worked with United Way Worldwide, in order to deliver food to people suffering food insecurity, such as seniors, low-income families and persons with reduced mobility.

Sainsbury's, supermarket app from the United Kingdom, created a new donations section and interfaced with charity organizations.

Gojek (Indonesia) invited customers from the home screen to make donations for partners in the restaurant sector.



Rappi, Argentina

Swiggy (India) in alliance with an NGO, worked on two initiatives, both **directly related to the pandemic.**

- Well-being fund for workers and their families (protection and medical coverage).
- Delivery of food for people living hand-to-mouth and migrant workers with no income.

Very similar to the example above and also in India, **Zomato** had an initiative prior to the pandemic to ensure food for vulnerable individuals. It had alliances with several NGOs. At the time of this research, this project had a 500,000,000 INR goal to **feed people with no income during the pandemic.** In addition, **they encouraged customers to make donations to an aid fund for delivery people** during times of confinement.

11St (South Korea) **promoted physical events to support local businesses and peasants with economic constraints** that provide basic need products. In the section dedicated to these events, basic cares are also mentioned: "Two meters apart to protect each other, zero meters apart in our minds". It works with the Ministry of SMEs and Startups to support the sales of products from provinces with difficulties.

An innovative element, is that they **motivated users to leave words of encouragement in the application and, for each comment, the app promised to donate 100 won** for “neighbors facing difficulties due to COVID-19”.

For its part, **Rappi** Argentina, showed on its home screen the alliance with NGOs such as Banco de Alimentos and Techo.

Uber Eats (Poland) joined the #wzywamyposilki (#callformeal) campaign in order to provide food for hospitals in cooperation with McDonalds. It also joined the “We Help” campaign which gave promotional codes for 1000 volunteers. The information about these campaigns was not found in the app.

Although **Amazon Prime Now** (Italy) did not have a donations campaign, the **Amazon** organization did so addressing Italian communities and socialized it through their website.

There were also applications that did not show any initiative related to COVID19, but already had campaigns promoting the well-being of communities.

In the home screen of **Rappi** (Colombia), there was a series of social campaigns not related to the pandemic. Most of them involved the donation of food and supplies. Although there was little information about such donations. **Rappi's** (Chile) campaign called "Donate now", is not related to COVID-19 either.

Merqueo (Colombia) had five (5) social campaigns in total, which were not linked to the pandemic. They were more focused on the donation of food and groceries for families at risk (structural poverty, migrant population and seniors) which were handed to the Colombian Government.

For its part, **UCook** in South Africa already had a donations bank, unrelated to the current pandemic, which helps the fight against hunger in that country.

Check-out and follow-up

W A I T I N G D E L I V E R I N G



What we found:

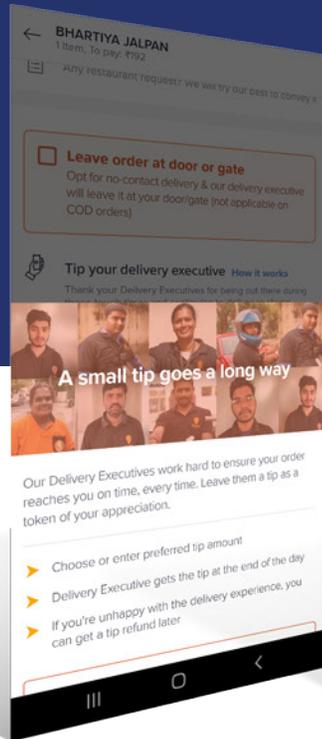
Contactless payment, suggested tips and changes to delivery fees



Pyszne

Poland

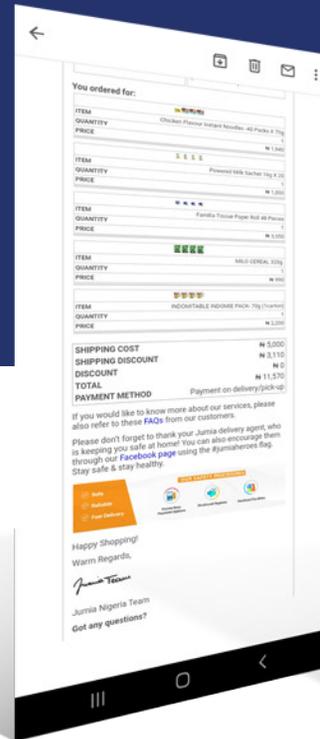
Suggests online payment to enable contactless delivery.



Swiggy

India

Promotes tips in times of COVID-19.



Jumia

Nigeria

Has high delivery fees and makes discounts on them at check-out.



Pedidos ya!

Argentina

Contactless delivery option only for online payment.

Shopping cart and check-out with suggestions of contactless modes



UberEats

Poland

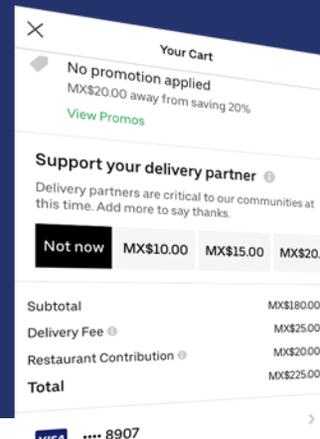
Temporarily removed the cash payment option.



Esselunga a casa

Italy

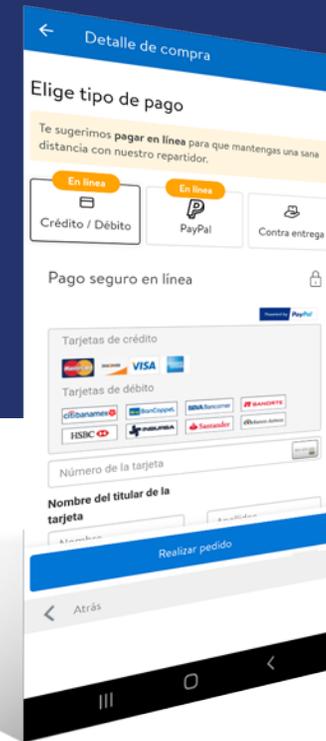
Does not allow credit card payment at delivery anymore.



UberEats

Mexico

Encourages tipping with preset amounts.



Walmart

Mexico

Suggests online payment to keep a safe distance.

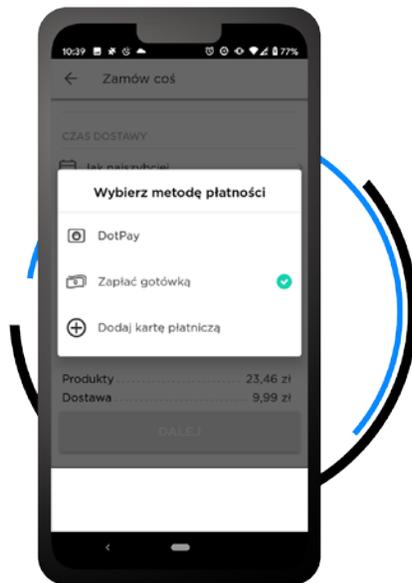
Contactless payment, suggested tips and changes to delivery fees

Twenty-six (26) applications that suggested contactless payment methods were identified in this section*. Some of them also reinforced contactless delivery in this section.

Most apps provided options for deliveries with no physical contact. Applications such as [Gojek](#) (GoFood) from Indonesia, explicitly suggested using payment gateways such as GoPay or in the case of [Glovo](#) (Poland), DotPay, in order to reduce human interaction with the purpose of helping COVID-19 prevention. Likewise, apps such as [Coupang Eats](#) (South Korea) selected this kind of payment by default.

Regarding cash payments, we found that 48% of the apps accepted this type of payments at the time of this study. Most perceived this in a positive usefulness degree because of the flexibility and easiness to pay for the delivery. It results interesting that in the case of [Pyszne](#) (Poland), when a user selected the cash payment option, the app automatically suggested the contactless payment. However, this information was not clearly visible for the user due to the amount of text there was.

*In this section it is important to revise the following decisions in light of the contexts, and taking into account the knowledge of each application's audience and its needs. Although the elimination of cash payment is relevant in order to avoid the spreading of the virus, it is known that in certain cases these restrictions may affect a segment of the population that does not have credit cards, thus limiting the access to the application in the moment they need it. Therefore, these actions will not be rated as "good" or "bad" practices.



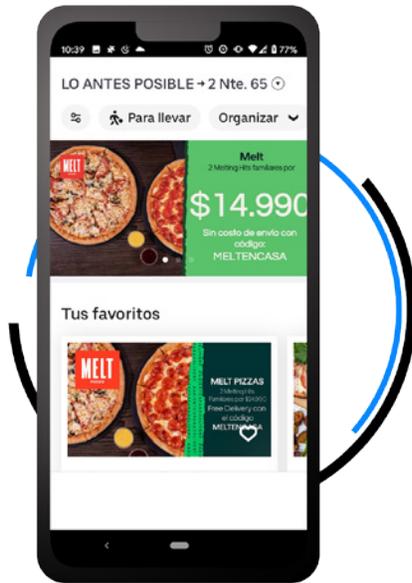
Glovo, Poland

Of course, it should be recalled that a good number of apps never had cash payments, as the case of **Sainsbury's** and **Morrisons** (United Kingdom) or **Deliveroo** (Australia).

- Some applications decided to temporarily remove the cash payment option, like **Uber Eats** (Poland), **The Food Assembly** (Italy), **Swiggy** and **Big Basket** (India). For its part, Pedidos ya! (Argentina) suggested the contactless payment option.
- In South Africa, **Takealot** had the cash payment option for certain essential items in specific geographical areas. This option is no longer available.
- **Eselunga a casa** (Italy) used to allow credit card payment at delivery. Now it can't be done.
- There were some contradictions in the **Thuis Bezorgd** app (Netherlands), since in their Frequently Asked Questions they claimed users could still pay in cash, while at check-out this option was nonexistent.

With regards to shipment fees, there were considerable variations between the few applications that had changes: **seven (7)** offered general fee discounts, **seven (7)** had segmented discounts for specific populations (seniors, vulnerable communities, essential workers and other) and **five (5)** increased their fees.

Good practices



Uber Eats, Chile.

Amazon Prime Now Italy

Eliminated delivery fees during COVID-19 phase 1.

Deliveroo Australia

At the time of the study offered low delivery fees, although it was not explicitly related to COVID-19.

Uber Eats Mexico, Australia and Chile

In the case of **Uber Eats**, in Mexico and Australia, they offered free delivery and encouraged users to support local businesses, without mentioning the pandemic. While **Uber Eats** Chile offered free deliveries from specific businesses such as the MELT Restaurant, through promotional codes. Finally, the version of **Uber Eats** had free deliveries for a certain time frame for "local" orders.

Walmart Mexico

Announced free deliveries, but it did not delve into the conditions or into information on that regard.

Postmates U.S.

In the case of **Postmates** (U.S.), they offered reduced delivery fees during lunch hours to make their service more accessible.

Opportunity areas

Postmates U.S.

Although **Postmates** had a good practice in terms of reducing delivery fees, it was evident that for other deliveries there was a price increase of the fees which is not explicit.

Swiggy **Zomato** India

It could be seen that **Swiggy** and **Zomato** (India) removed their discount coupons which were usually available. In turn, they were imposing larger taxes and packing charges. The sum may represent up to 30% of the price increase.

The Food Assembly Italy

This app doubled the delivery fee since the beginning of the pandemic.

Jumia Nigeria

Had an increase of the delivery fee, which was later removed at check-out.

Few apps showed alliances with specific brands of mass consumption products in order to offer free deliveries.

Cornershop

Mexico

In **Cornershop**, Nestle used the hashtag "I stay home" to promote their free delivery.

Jumia

Nigeria

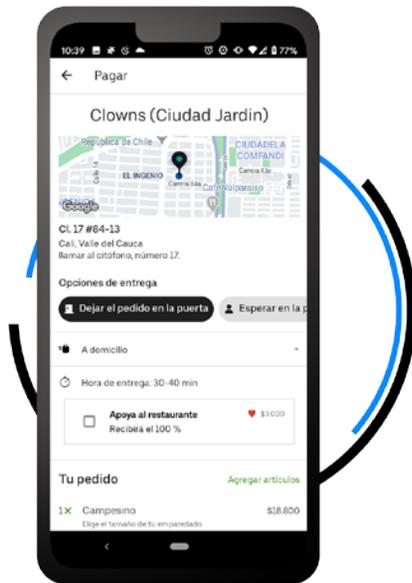
Announced brands with free delivery due to COVID-19. Coca-Cola, Fayrouz, Reckitt Benckiser, Unilever, Jameson, P&G, Amstel Malta, Maltins, Honeywell & Molfix.

In general, regarding tips, although most applications kept the options they had before the pandemic, as the case of **Uber Eats**, some opted to encourage customers to leave a tip for delivery people or restaurants.

Some applications used words such as "gratitude", "hard times", "put life at risk" and "heroes" in order to refer to the work of delivery people and promote said practice.

In the case of the applications from the United Kingdom, **Sainsbury's** and **Morrisons**, it was stated that it was not appropriate for an app to suggest giving a tip or expressing gratitude for their delivery people, above all because several applications have their delivery people as direct employees. This is also the case of **Wollworths** (Australia).

Good practices



Uber Eats, Colombia.

Getir Turkey

In Turkey, [Getir](#), asked users to show generosity to the delivery person through the digital tip function. Prior, tips were only given in cash.

Uber Eats Mexico and Colombia

Had options to directly support the restaurant with a little amount. They claim 100% of said contribution goes to the businesses.

Zomato India

Encouraged customers to add a tip to help delivery people in "hard times". They had default options and highlighted the most common tip amount.

Jumia Nigeria

There were applications such as [Jumia](#) (Nigeria) which encouraged customers to thank delivery people who are "risking their lives", but they did not explicitly link it to tips. They advocated for the use of the hashtag #JumiaHeroes in social networks.

Opportunity areas

Instacart

U.S.

Made the tip mandatory. It asked users to thank the shopper with a default tip and, in addition, encouraged to consider a little extra.

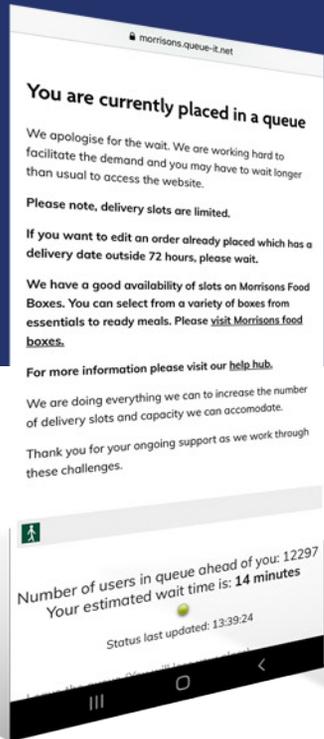
Happy Fresh

Indonesia

In Indonesia, for **Happy Fresh** the tip remained personal. They asked users to give a cash tip in a closed envelope. There was no digital option at the time of this study.

What we found:

Delivery slots: the greatest fulfillment challenge



Morrison's

United Kingdom

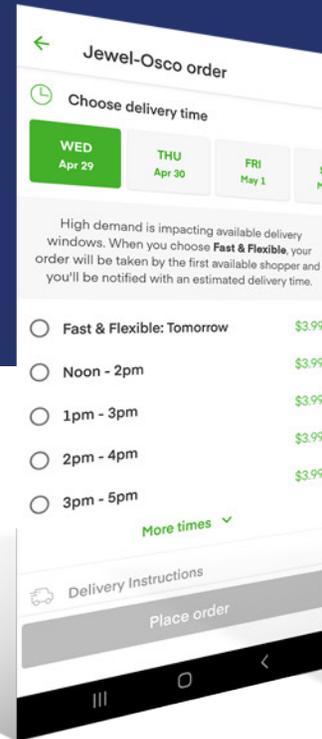
Up to 12 thousand people wait to get a scheduling slot.



Esselunga a casa

Italy

Offers online shopping and scheduling pick-up at store with slots.



Instacart

U.S.

Option to choose the first available shopper and get notified.

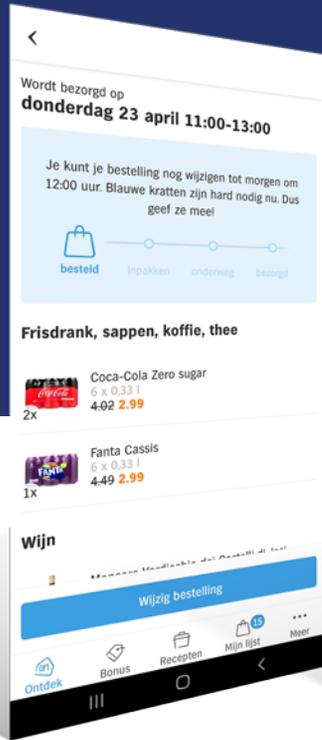


Big Basket

India

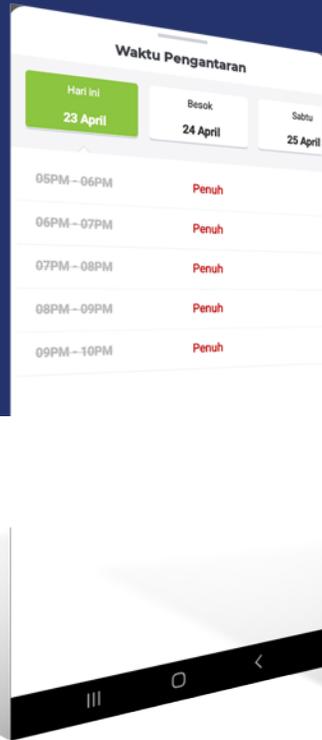
Informs on measures and slot limitations due to the contingency.

Some slot scheduling examples



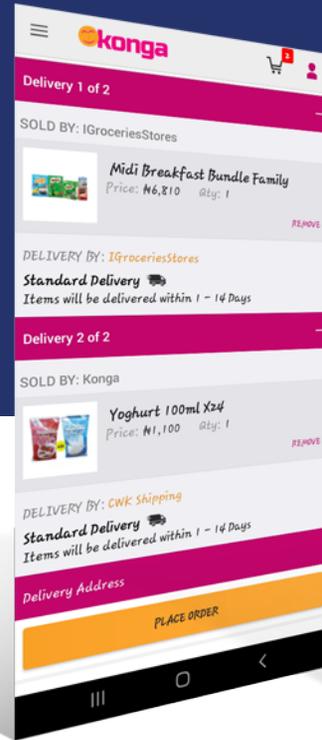
Albert Heijn
Netherlands

Has few scheduling slots, but there is flexibility when changing the order up to a certain hour.



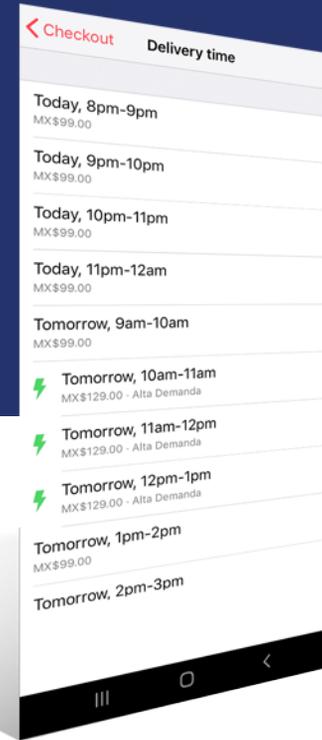
Happy Fresh
Indonesia

Lack of available slots for the next days.



Konga
Nigeria

Priorizes on essential products and announces delivery schedules (1-14 days).



Cornershop
Mexico

Only scheduled orders are available. Cost variation according to the hour.

Delivery slots: the greatest fulfillment challenge

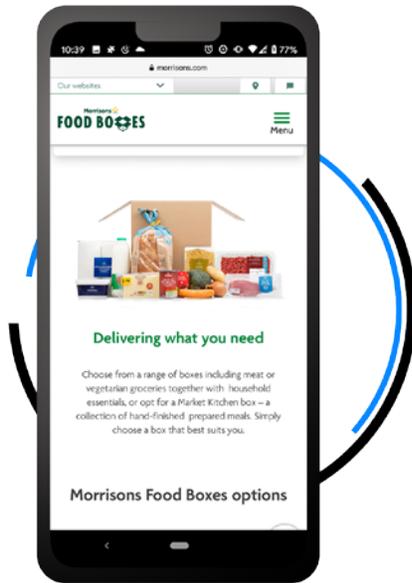
Applications that work with scheduled slots were those that presented the most issues with delivery times. The high demand created by the pandemic generated the collapse of several of the reviewed apps.

The delays may even take weeks, in apps that previously scheduled delivery slots for the following day.

The “Very good practices” section lists those applications that offer alternatives to solve long delay issues in scheduled deliveries.

In that sense, [Esselunga a casa](#) (Italy) had an interesting solution case in order to simplify and streamline the product acquisition times, when facing low availability of slots. However, this measure may be controversial, due to the nature of the pandemic and the need to keep people in their houses. The app promoted in-store shopping (live shopping), limiting the lines in the stores with the use of the UFirst app. It also started a service initiative for pick-up in 18 new points.

Very good practices



Morrisons, United Kingdom

Morrisons United Kingdom

In order to facilitate delivery times, **Morrisons** (United Kingdom) created a fast shopping option (Food Boxes) which had preferential delivery times.

Takealot South Africa

Had time frames to schedule orders: from 8am to 5pm, on business days. The delivery date was determined by the inventory stock.

Sainsbury's United Kingdom

Likewise, established in its communications that its suppliers deliver products on specific schedules, which meant users could take this into account when placing their orders.

Woolworths Australia

Announced more slots (spaces for scheduling deliveries), to reduce delays. In addition, they claimed the order could be picked up at the store.

Amazon Prime Now Italy

Made a similar slot opening announcement, however, during the time this study, such slot opening had not taken place.

Albert Heijn

Netherlands

Had few slots to schedule deliveries and the information regarding times was only available on its website and not in the app, it let users know there would be more slots in the future.

Instacart

U.S.

For its part, announced two new delivery methods

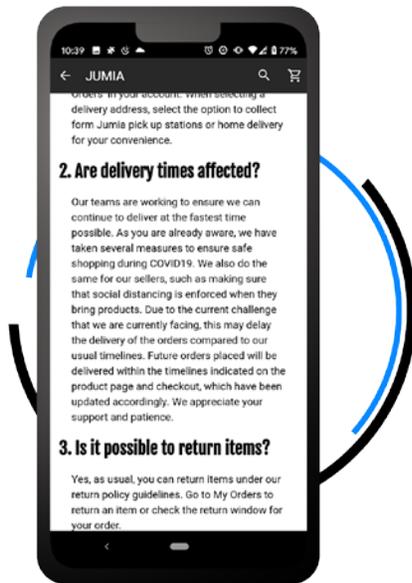
- 'Fast and flexible delivery': according to the first available shopper it would generate an estimated range of days.
 - 'Order ahead': orders placed two weeks in advance.
-

The Food Assembly

Italy

Announced a greater investment on their fleet of delivery people.

Good practices



Jumia, Kenya.

Happy Fresh Indonesia

At least in terms of communication, warned users about delays and complications. **Konga** (Nigeria) did the same on its home screen. It also established essential products with priority to be dispatched first.

Big Basket India

In the case of **Big Basket**, also in terms of user communication, a pop-up provided updates on deliveries. It had a link to Frequently Asked Questions with a list of the reasons for the unavailability of slots or orders that had not been sent. Essential purchases, which previously took just a day or hours for express orders, could take up to one week.

Jumia Kenya

Announced delays due to their dependence on several suppliers, however the order arrived a day earlier.

Opportunity areas

Sainsbury's United Kingdom

It was common that customers find the non-availability of delivery slots just until the end of the purchase flow where they got stuck. Such is the case of [Sainsbury's](#)

Big Basket India

Something similar happened with [Big Basket](#), whose slot availability was only known at check-out. Customers with monthly subscriptions seemed to have priority over other customers at the time of getting slots.

Sainsbury's Morrisons United Kingdom

In the United Kingdom, it was very difficult to get an available space or slot to receive the orders. With regards to [Sainsbury's](#) the user had to constantly check the application in order to get an available slot. There were no notifications or other elements that could help the user. During the exercise of reviewing [Morrisons](#), it was not possible to find a delivery slot for the order.

Happy Fresh Indonesia

Regarding [Happy Fresh](#), it could not fulfill urgent purchases, since orders could only be scheduled for three days after the purchase.

Konga Nigeria

Faced the greatest scheduling issue, since it claimed prioritizing on essential products, **delivery time could range from 1 to 14 days** (for products like yogurt and cereals).

Istegelsin

Turkey

In Turkey, [Istegelsin](#) was not clear on when the delivery was possible, the next three days after the order appeared to be full. The cause of the issue was not explicit.

Amazon Prime Now

Italy

In the case of [Amazon Prime Now](#), although it tried to solve slot issues, at the time of this study, it could be seen there was an increase of 24 to 48 hours compared to the executed delivery time before the pandemic which used to be one hour.

Merqueo

Colombia

In the app [Merqueo](#), the fastest delivery for the user, at the time of this study, was 24 hours after placing the order. It was complex to schedule the delivery of groceries for the same day the order was placed.

Walmart

Mexico

Warned about delivery delays. In the case of this study, it just had a 1-hour delay against the scheduled time frame.

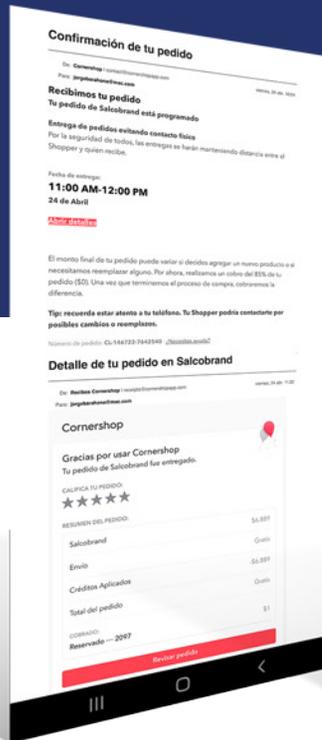
Cornershop

Mexico

announced there were no immediate deliveries, just scheduled ones.

What we found:

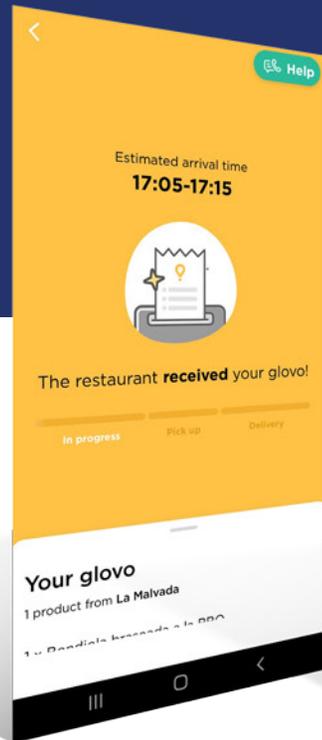
Tracking: delivery times from purchase to delivery remain unchanged



Cornershop

Chile

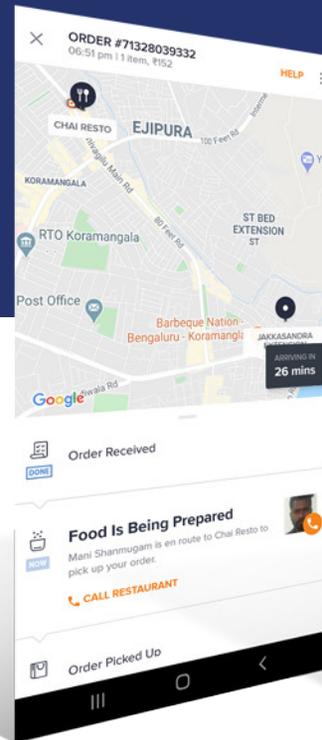
Warns about delivery delays.



Glovo

Argentina

There was no delay in the promised delivery time, it even appeared to be faster.



Swiggy

India

Promise to deliver in 26 min was fulfilled.

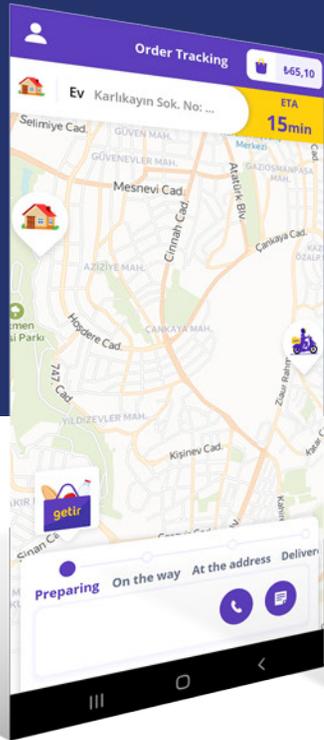


Uber Eats

Chile

Notifies through email order requests schedules. Mentions the curfew in the country.

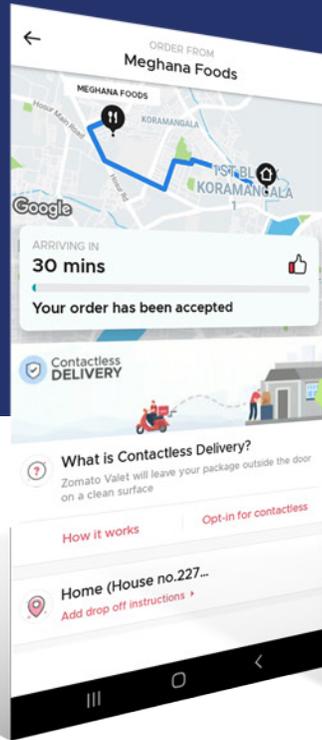
Order tracking



Getir

Turkey

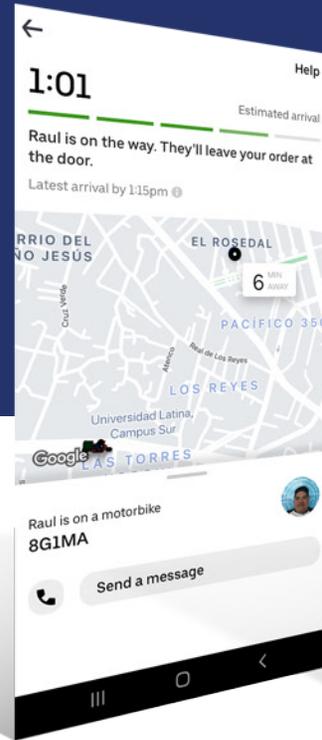
Driver tracking example.



Zomato

India

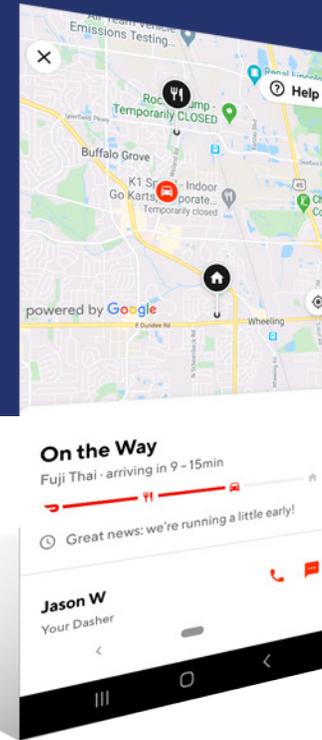
Driver tracking example.



Uber Eats

Mexico

Driver tracking example.



Doordash

U.S.

Driver tracking example.

Tracking: delivery times from purchase to delivery remain unchanged

Most applications did not have delays. Some apps such as **Glovo** (Argentina) or **Cornershop** (Chile) which warned about long waiting times did not have any delays, and applications such as **Swiggy** (India) or **Glovo** and **Pyszne** (Poland) appeared to be faster than before.

Just 36% of the apps offered information on the changes caused by COVID-19 on their delivery times.

Certain applications highlighted restriction times, according to directions from governmental entities. Such was the case of **Uber Eats** (Chile) that mentioned the time frames in which order requests were received due to the imposed curfew (until 20:30), and **Banabi**, in Turkey, that mentioned delays on weekends due to delivery limitations during those days.

Delivery and support



What we found:

Social distancing and face masks as a trend



Konga

Nigeria

Delivery with incorrect use of mask.



Baemin

South Korea

Delivery person wearing goggles and face mask as a biosafety measure.



Rappi

Colombia

Although the delivery person was requested to leave the package at the door, he handed it directly to the customer.



Walmart

Mexico

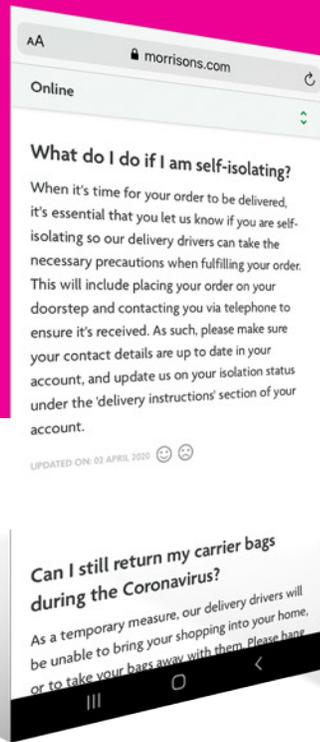
Delivery people wear face masks.

Social distancing and face masks as a trend



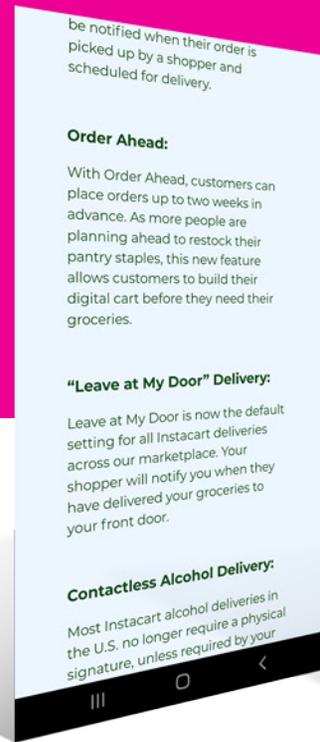
Albert Heijn Netherlands

Delivery people enter the house to make the delivery.



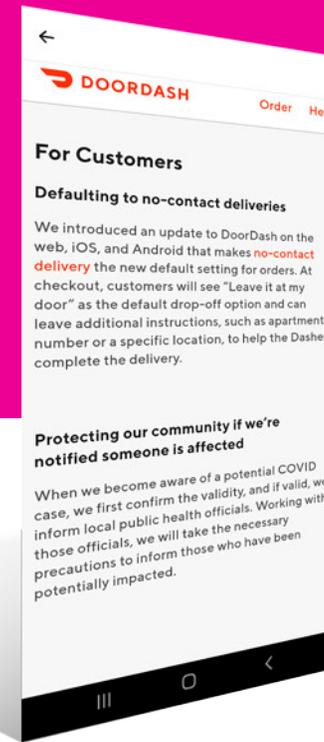
Morrisons United Kingdom

Delivery people are no longer allowed to enter customers' houses. This was previously allowed.



Instacart U.S.

For the delivery of alcoholic beverages, ID is scanned to avoid getting close to sign.



Doordash U.S.

The contactless delivery is not mandatory. However, it is selected by default.

Social distancing and face masks as a trend

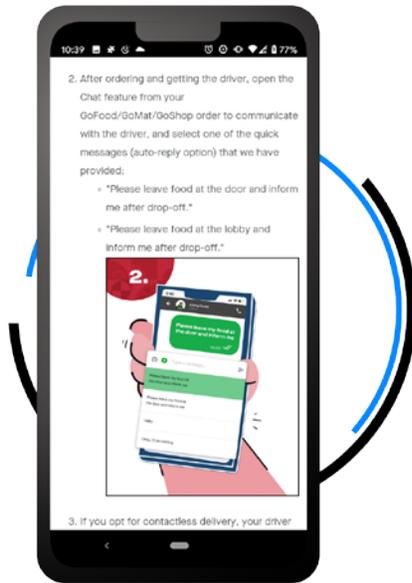
85% of the applications established contactless deliveries as priority (leave at door). Without a doubt, **it was the most frequent decision of all applications when facing the pandemic.**

The contactless delivery suggestion did not necessarily imply that the other delivery options were unavailable in most of them.

Certain apps, as seen above, featured this function in their home screen, making emphasis in customer care. Other applications like [Gojek](#) (Indonesia) did so from their articles section and others just at check-out.

It is important to highlight some particularities in terms of this option which became mandatory in some cases.

Good practices



Gojek, Indonesia

Gojek Indonesia

Incorporated a new fast messaging option in the chat between user and delivery person. At the time of review it included the phrase: "Leave the food at my door or lobby". In addition they worked with e-wallet.

Morrisons United Kingdom

Morrisons, a supermarket app in the United Kingdom, used to allow delivery people to enter customers' homes to leave the order. At the time of this study it was not possible.

Doordash U.S.

In the case of **Doordash** (U.S.), although the contactless delivery option was not mandatory, it was selected by default.

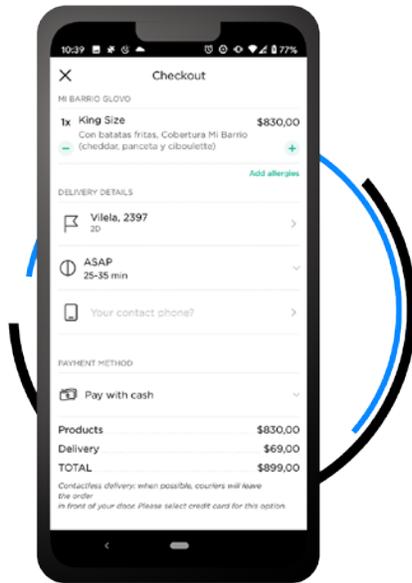
Instacart U.S.

An innovative practice was that of **Instacart** in the U.S., for the delivery of alcoholic beverages. Previously, a signature was required during the face-to-face delivery, which was replaced with the scanning of the user's ID; this can be done with a device from a distance.

The Food Assembly Italy

Apps like The **Food Assembly**, which used to have congregation spaces for the gathering of purchased groceries, completely eliminated this option. This is relevant, because it was the core of their business. It has become fully digital, just with delivery services.

Opportunity areas



Glovo, Argentina

Glovo Argentina

There were applications like **Glovo** (Argentina) that despite having an option for contactless delivery, said option was almost invisible at check-out.

Albert Heijn Netherlands

Delivery people from **Albert Heijn** (Netherlands) went inside the house to leave open baskets with the orders.

Uber Eats Netherlands

In the Netherlands, Uber Eats offered the option to pick up products, receive it personally or leave it at the door. At the time of this study choosing the latter is mandatory. However, in the case study the delivery person directly gave the package to the user. The same happened with **Rappi** (Colombia).

93% of the reviewed applications set security measures for their delivery people regarding the use of protective elements, which were mostly face masks, gloves and antibacterial gel.

It was common to find apps announcing the supply of these elements and the suggestion of use, but they did not ensure their delivery people followed this measure, like in the case of **Uber Eats** (Colombia).

In any case, 78% of the apps positively showed their delivery people followed the biosafety measures. The best rated were **Uber Eats** (Chile), **Merqueo** (Colombia), **Gojek** (GoFood) (Indonesia), **Happy Fresh** (Indonesia), **Halodoc** (Indonesia), **Cornershop** (Mexico), **Albert Heijn** (Netherlands) and **Baemin** (South Korea).

Country	Application	Face Mask	Gloves	Antibacterial Gel	Goggles	None or misused	Observations
Argentina	Glovo	x					
	Pedidos ya!					Face mask misuse	Wearing mask on the neck
	Rappi					Face mask misuse	Wearing mask on the neck
Australia	Deliveroo					Do not use protective equipment	In Australia the use of face mask or gloves is not usual
	Uber Eat					Do not use protective equipment	In Australia the use of face mask or gloves is not usual
	Woolworths					Do not use protective equipment	In Australia the use of face mask or gloves is not usual
Argentina	Cornershop	x					
	Rappi	x					
	Uber Eats	x					
Colombia	Merqueo		x		x		
	Rappi	x					The use of gloves may vary
	Uber Eats	x					
South Korea	11St	x	x				
	Baemin	x	x				
	Coupang Eats	x	x		x	Does not use protective equipment	

Country	Application	Face Mask	Gloves	Antibacterial Gel	Goggles	None or misused	Observations
United States	Glovo		x	x		Varies. Do not necessarily use protective equipment	Delivery people must request protection kits
	Instacart	x		x			
	Postmates					Varies. Do not necessarily use protective equipment	
Netherlands	Albert Heijn		x			Do not use protective equipment	
	Thuis bezorgd			x			
	Uber Eats						
India	Big Basket	x	x				
	Swiggy	x					
	Zomato	x					
Indonesia	Happy Fresh	x	x				
	Halodoc	x	x				
	Gojek (GoFood)	x	x				
Italy	Amazon Prime Now	x	x				
	Esselunga a casa	x	x				
	The food Assembly	x	x				

Country	Application	Face Mask	Gloves	Antibacterial Gel	Goggles	None or misused	Observations
Kenia	Jumia			x			
Mexico	Cornershop	x	x				There is no consistency. In an order the delivery person is just wearing the mask, the other is just wearing gloves
	Uber Eats	x					
	Walmart	x	x				
Nigeria	Domino's					Does not use protective equipment	There is no consistency. In an order the delivery person is just wearing the mask, the other is just wearing gloves
	Jumia	x	x				
	Konga	x		x		Face mask misuse	
Poland	Glovo	x					The use of a mask is mandatory in Poland
	Pyszne	x					The use of a mask is mandatory in Poland
	Uber Eats	x	x				The use of a mask is mandatory in Poland

Country	Application	Face Mask	Gloves	Antibacterial Gel	Goggles	None or misused	Observations
United Kingdom	Morrisons		x				
	Sainsburys		x	x			
South Africa	Takealot	x	x				
	Ucook	x	x				
Turkey	Banabi						
	Istegelsin						
	Getir	x	x				

What we found:

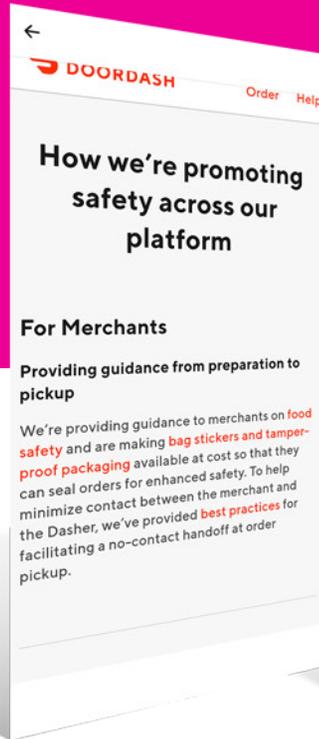
In the hands of the user: packages with more plastic and poor instructions



Woolworth

Australia

Double use of plastic bag.



Doordash

U.S.

Has delivery protocols to avoid contact.



Swiggy

India

Gives users instructions on how to choose contactless deliveries.



Merqueo

Colombia

Uses reusable plastic boxes to carry products.

In the hands of the user: packages with more plastic and poor instructions



Sainsburys

United Kingdom

Now uses plastic bags for food deliveries.



Rappi

Colombia

Use of double plastic bag.



11St.

South Korea

Delivers its products with no packing.



Cornershop

Chile

Uses paper bags.

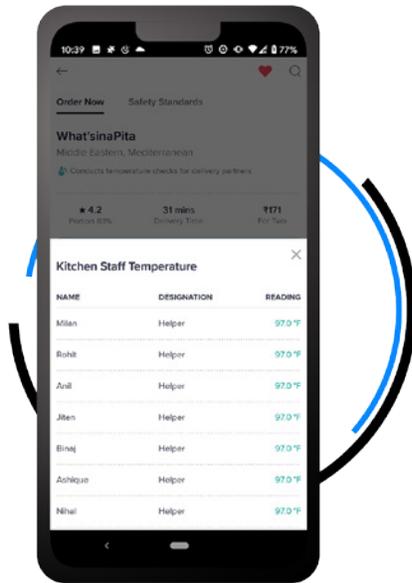
In the hands of the user: packages with more plastic and poor instructions

Most applications didn't seem to have drastic changes in packaging. Just **12% of the reviewed apps modified its packaging due to the pandemic.**

In South Korea, **11St** delivered its products with no packaging. The delivery person had a box and the purchased groceries were directly delivered, a good environmental practice which avoids producing waste. However, some users considered there was a virus transmission risk due to the handling of food.

Nevertheless, plastic has become the material used to pack the delivered orders. The United Kingdom even lifted the restriction to plastic bags due to COVID-19.

Very good practices



Swiggy, India.

Swiggy

India

Made sure customers know they are being looked after throughout the whole chain. Some packages had a sticker indicating the temperature of the chef, the packer and the person making the delivery. This option was not available for all restaurants and all deliveries.

Doordash

U.S.

For its part, **Doordash** created delivery protocols. Thus, some delivery people let the users know the way they handled the package. For instance, **if the package was handled from the top, they ask the user to take it from the bottom.**

In addition, they implemented a seal tag and a handling-proof paper wrapping in order to seal the orders and improve safety.

Swiggy

India

Gave users instructions on selecting contactless deliveries, cleaning the doorbell when receiving the delivery, using antibacterial gel and giving some to the delivery person. In addition, encouraged users to leave a beverage on the floor for the delivery person in order to keep them hydrated.

Merqueo

Colombia

Although it was not a health measure, it's worth highlighting that **Merqueo** offered the user the possibility to share the list of ordered products with another person, in case the one receiving the order is someone else.

Opportunity areas

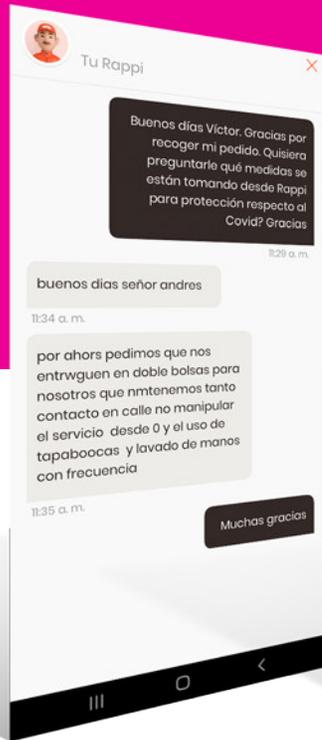
Sainsburys (UK) at the time of the study used plastic bags in food deliveries. In the same way, **Uber Eats** and **Thuis Bezorgd**, in the Netherlands, delivered the food wrapped in a plastic bag.

Restaurants affiliated to applications like **Rappi** and **Uber Eats** in Colombia, were using two plastic bags for their deliveries.

Other applications such as **Woolworth** (Australia) and **UCook** (South Africa) changed their delivery method from returnable or re-usable to plastic.

What we found:

Customer service: insufficient direct contact and restricted returns



Rappi

Colombia

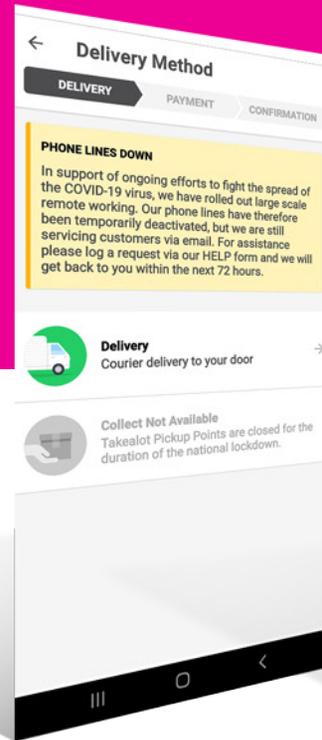
There is a direct chat with the delivery person or selected shopper, but not with Rappi's customer service.



11St.

South Korea

Includes chat, hotline and sign language service.



Takealot

South Africa

Warns its customers about disabled hotlines

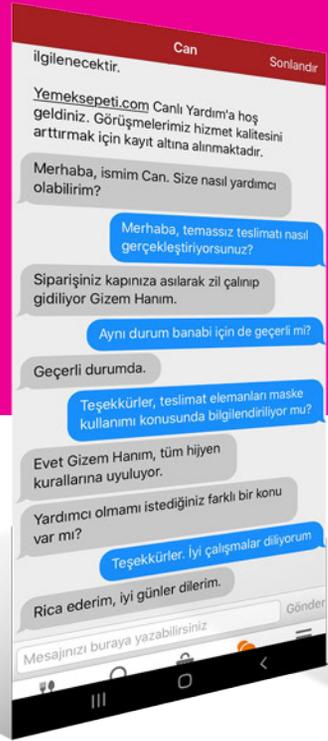


Baemin

South Korea

Warns its customers about disabled hotlines

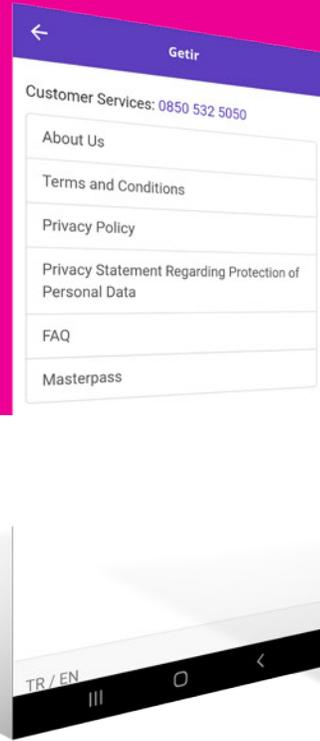
Customer service: insufficient direct contact and restricted returns



Banabi

Turkey

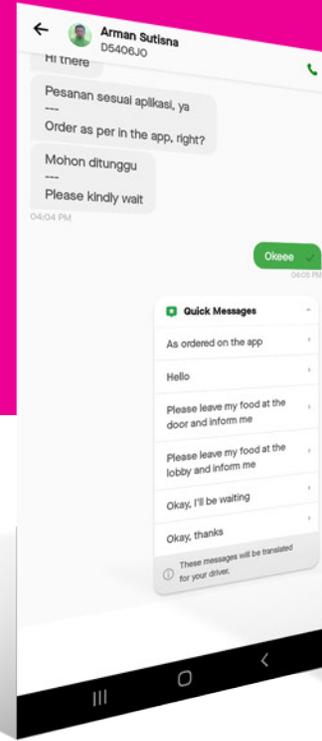
Uses the chat as direct communication channel.



Getir

Turkey

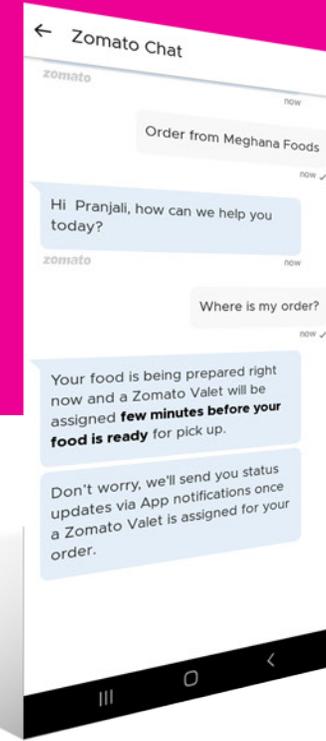
Makes the phone number more relevant than the other options.



Gojek

Indonesia

Chat as communication channel and use of quick messages.



Zomato

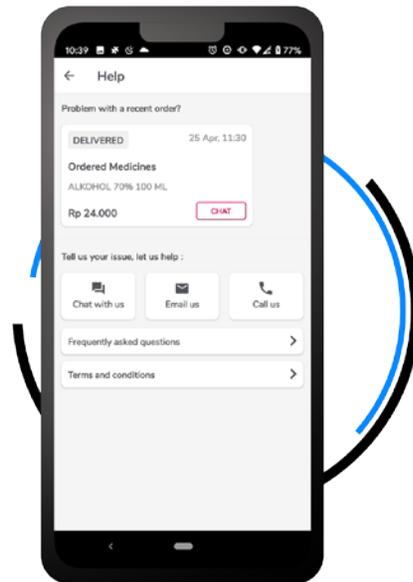
India

Has a general support chat.

Customer service: insufficient direct contact and restricted returns

Out of 47 reviewed apps, only **ten (10)** clearly offered customer service hotlines within the platform. **Nine (9)** mentioned e-mails, although most of the users that selected this contact option claimed never receiving a response.

Another **fifteen (15)** included the customer service information in the Frequently Asked Questions or Help articles. Some provided e-mails in these texts, which were pretty much invisible among so much information. Several apps appeared to strongly outline topics, preventing that other kind of questions could be solved.



Halodoc, Indonesia.

Ultimately, **fourteen (14)** applications did not clearly inform how to directly contact them. Just **four (4)** applications out of six (6) which were contacted via telephone were mentioned with positive comments such as “complete information”, “very fast”, “enough data”. **Getir** (Turkey), **Banabi** (Turkey), **Domino’s** (Nigeria), **Halodoc** (Indonesia), **Big Basket** (India)

Good practices

Applications that had chats as direct communication tool stood out: **Glovo** (Argentina), **Woolworth** (Australia), **Deliveroo** (Australia), **Swiggy** (India), **Zomato** (India), **Big Basket** (India), **Halodoc** (Indonesia), **Esselunga a casa** (Italy), **Baemin** (Korea), **11St** (South Korea), **Banabi** (Turkey), **Instacart** (U.S.), **Merqueo** (Colombia).

Some applications informed users about possible response delays, such as **Baemin** (South Korea) and **Instacart** (U.S.). In addition, **Esselunga a casa** (Italy) warned users that due to the emergency situation of the country, it reserved the right to manage the reports it deems a priority.

In terms of communication, **UCook** (South Africa) and **Takealot** (South Africa) were the only applications that notified their customers about the fact their customer service area is teleworking, and that they could only be contacted through email.

Opportunity areas

Applications like **Rappi** (Colombia) or **Postmates** did not have a direct contact hotline available.

On the other hand, only **one (1)** application explicitly removed the returns option: **Takealot** in South Africa. However it only offered this information through social networks or its website.

In the case of **UCook**, also from South Africa, used to accept packages to recycle, this option was removed.

Measurements

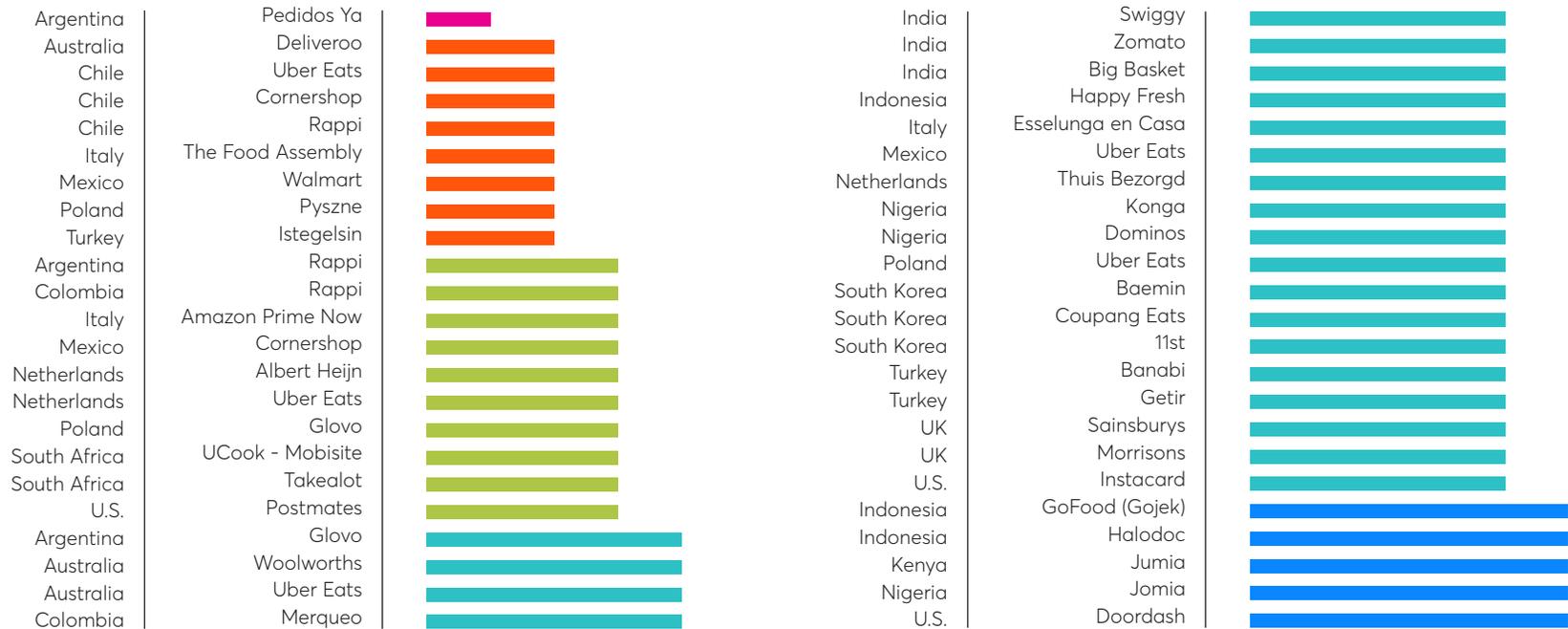


Apps usefulness assessment with respect to COVID-19

Chart - General ranking

The consultants who reviewed the applications rated in a 1-5 scale (being 1 "it is useless" and 5 "I was positively surprised") how useful were the processes and the information provided in different purchase processes: home screen, categories, product selection, shopping cart, payment, order tracking and delivery.

Below is the average of the rating obtained by each application, from lowest to highest.



UX Score

What we analyzed:

- How easy is it for the user to learn how the application works?
- Are the functions and features of the apps accessible? How easy are they to use?
- Is the application interesting? Does it stimulate its use?
- Does the user feel the application is suitable for him/her?
- Is the appearance of the application satisfactory?

What we found:

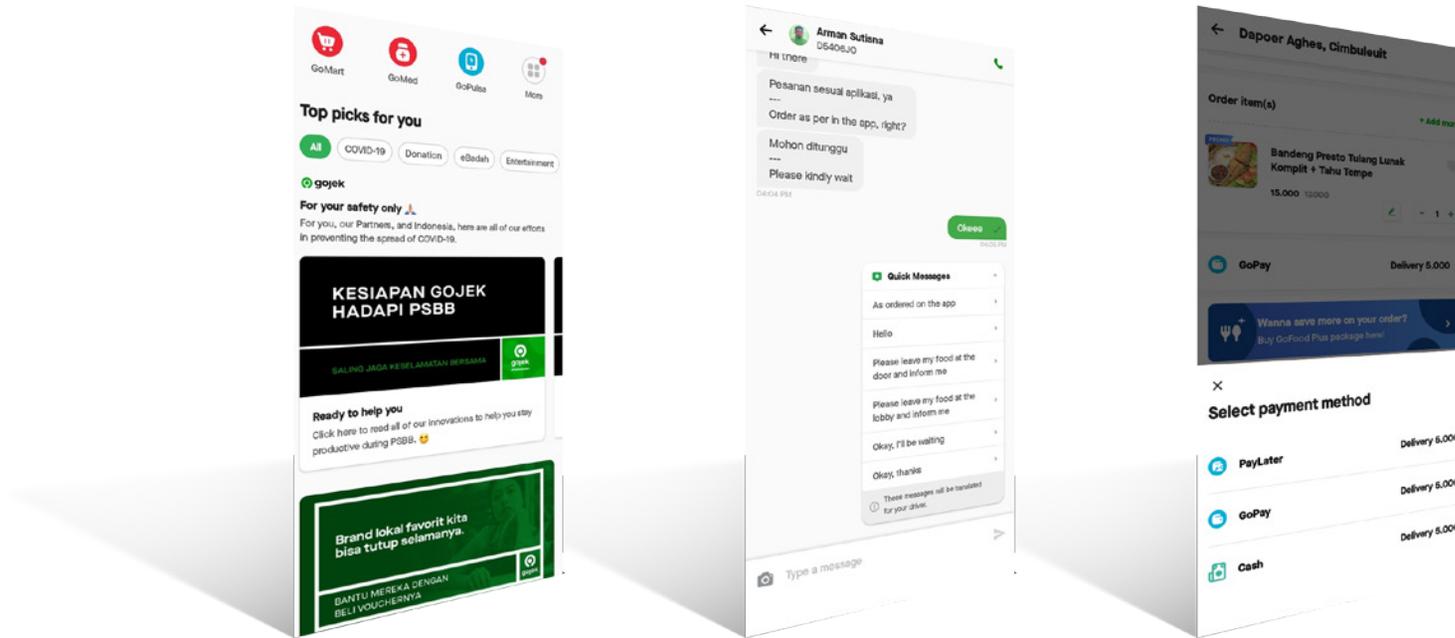
Through the UX Score, we were able to compare the applications that best implemented the basic functions in order to set the foundations for a good user experience.

In general, most apps received ratings between four (4) and five (5) points; highlighting the **learnability, operability, product fit and look & feel** attributes.

Top 3: apps that stand out in UX

App	Country	UX Score	UX Score %
Gojek (GoFood)	Indonesia	58 / 60	97 %
Halodoc	Indonesia	57 / 60	95 %
Doordash	United States	57 / 60	95 %

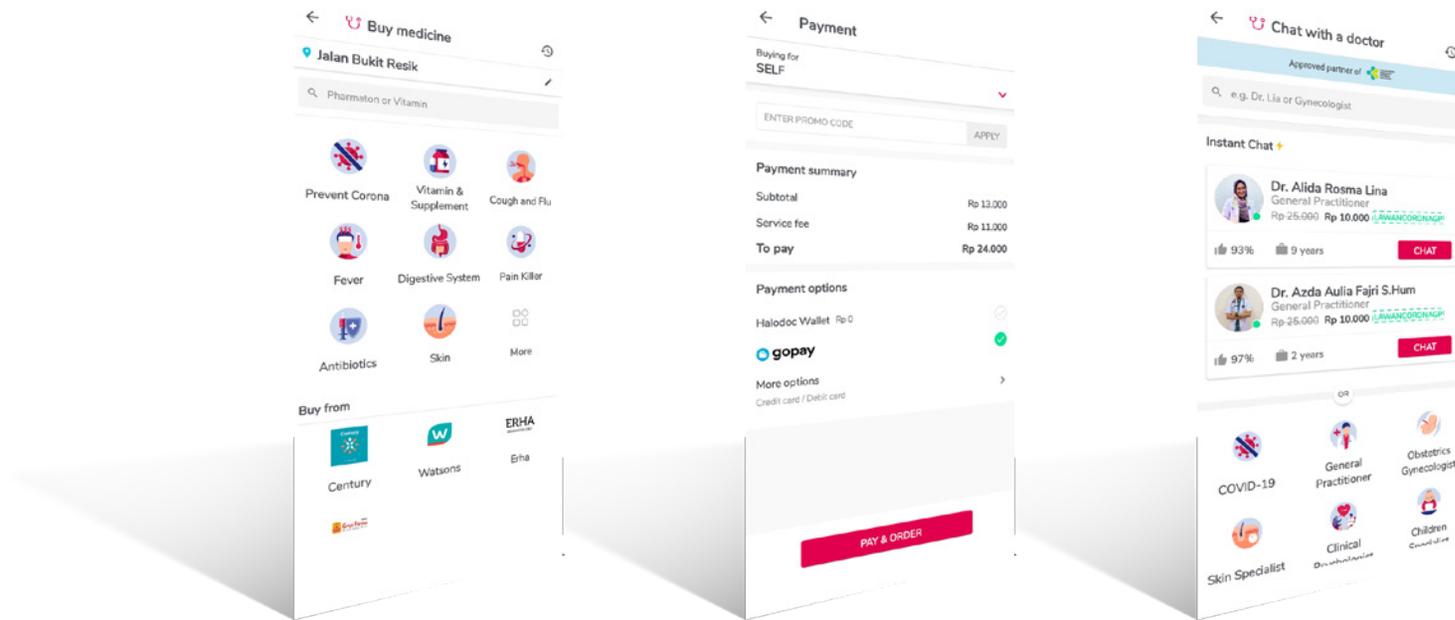
Below is a list of the functions and features that stand out for these applications.



Gojek (GoFood) 58/60

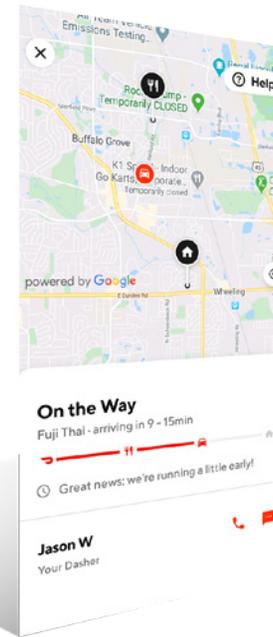
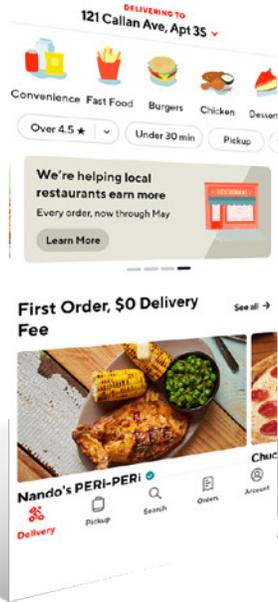
- Customization of the content throughout the application according to the user's profile.
- Information on availability of products (stock) and stores.
- Friendly and close communication with the user.
- Information on lifestyles and prevention measures in times of the pandemic such as: staying productive, staying home and hygiene protocols, among others.
- Information and frequently asked questions on COVID-19 organized by topic.
- Search field in all screens.

- Rating system: ratings with comments from the users.
- Multiple payment alternatives: Options to pay at the end of the month are included, as well as an own payment system (e-wallet).
- Instant messaging with access to frequently asked questions.
- Real time tracking from the application.
- Push notifications on the status of the process according to milestones.
- Option for immediate product delivery.
- Estimated time delivery service.



Halodoc 57/60

- The app offers complementary services such as: COVID-19 quick test, chats with MDs and visit a hospital with no queues.
- Close and personalized communication.
- The categorization goes beyond the type of product, it is sorted by ailment, which creates a closer communication addressing the needs of the user.
- Information is easy to understand and the product search is agile.
- At checkout the user can determine if the order is for someone else.
- Alliance with Gojek to provide payment alternatives (e-wallet), immediate delivery options and order tracking.
- Real time tracking from the application and visible help options.
- Estimated time delivery service.
- Multiple customer service channels available and quick answers.
- The app transmits trust informing that it is approved by the Health System of the Republic of Indonesia.



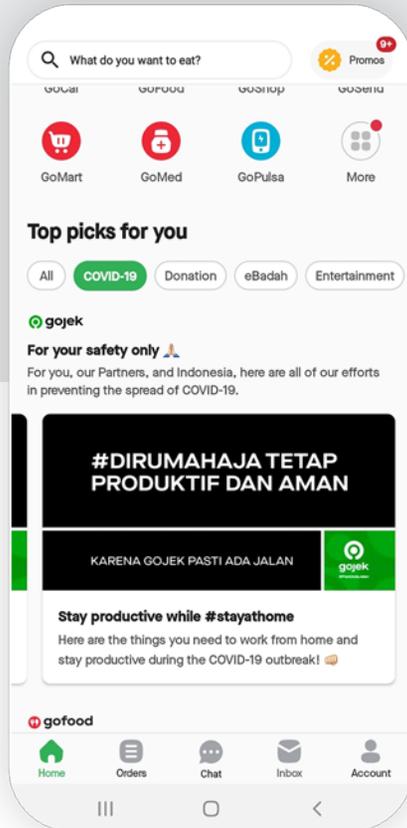
Doordash 57/60

- Help information related to COVID-19 divided in topics for each member of the ecosystem: local businesses, community, health and safety.
- Good categorization, the users swiftly obtain their results in different ways.
- Results filter options: includes rating.
- Real time tracking from the application and visible help options (chat).
- Push notifications on the status of the process according to milestones.

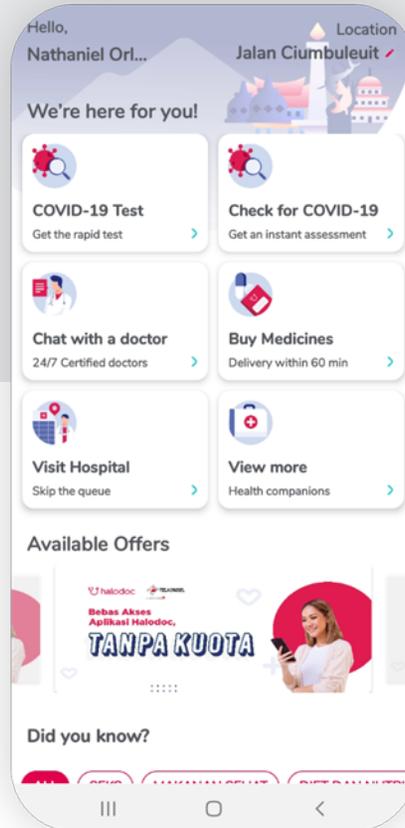
- Delivery modes variety: immediate, pickup or scheduled.
- Main menu option for food pickup.
- Function to place subsequent orders with the same information.
- Visibility of available promotional codes.
- Identification icon for subscribers who have free deliveries.
- Estimated time delivery service.

Flow comparison per screen

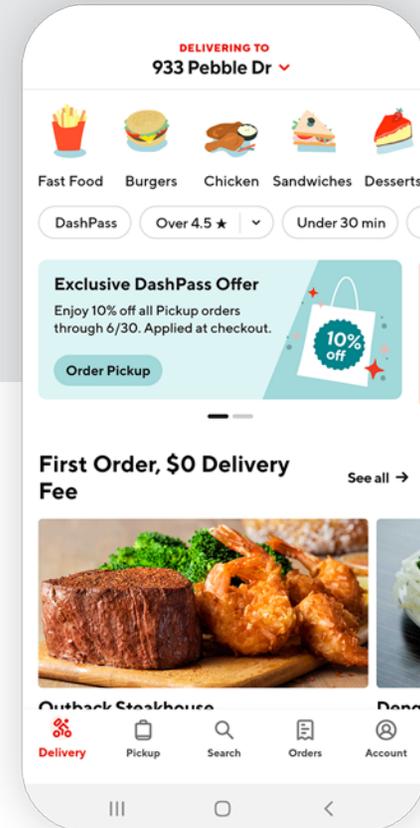
Home screen



Gojek (GoFood)
Indonesia



Halodoc
Indonesia

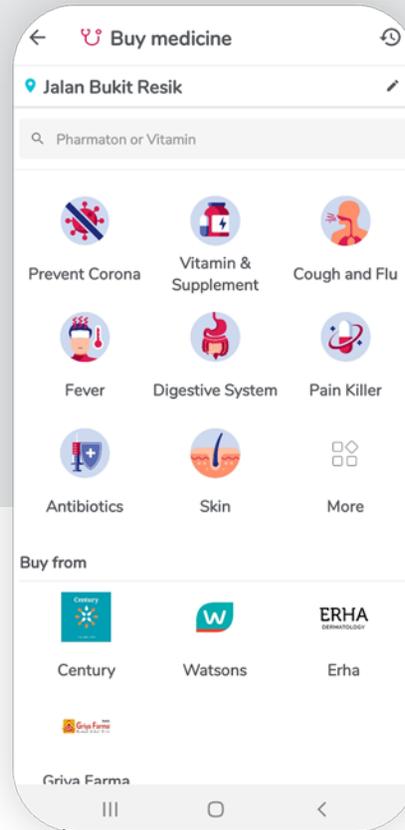


Doordash
U.S.

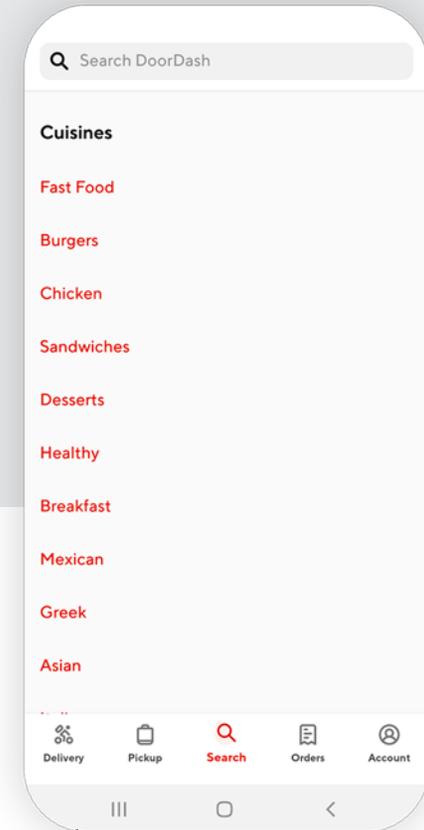
Sections or categories



Gojek (GoFood)
Indonesia



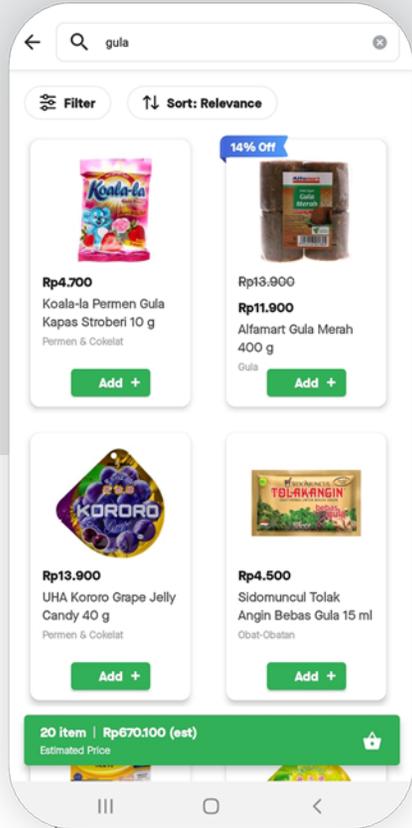
Halodoc
Indonesia



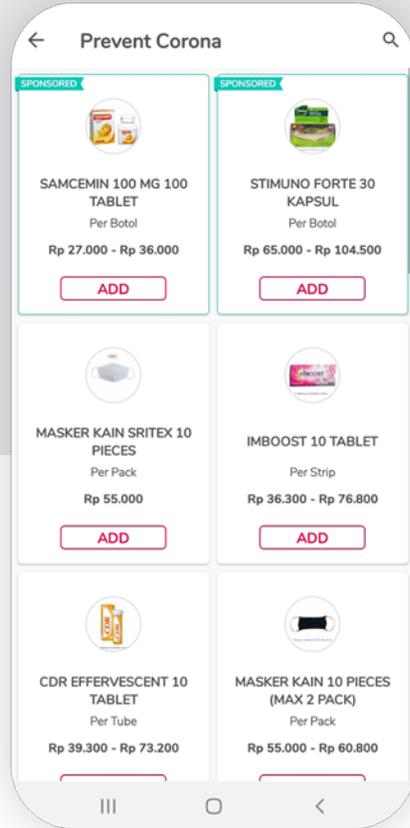
Doordash
U.S.

In addition to the rotating banner in the home screen, it has a list of search categories

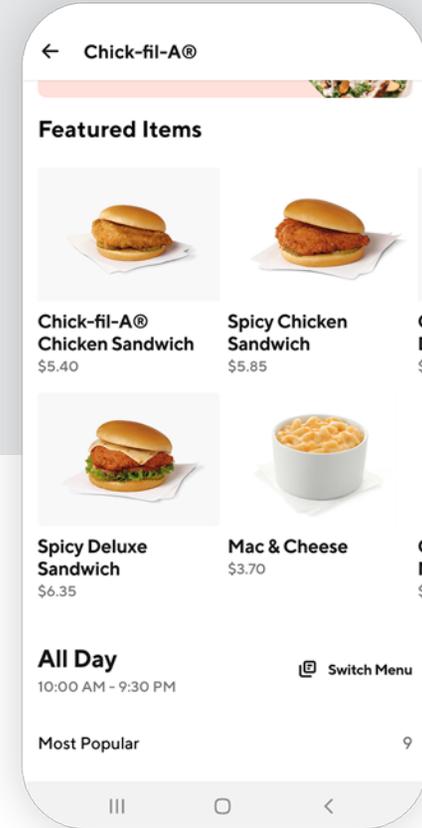
Products list



Gojek (GoFood)
Indonesia

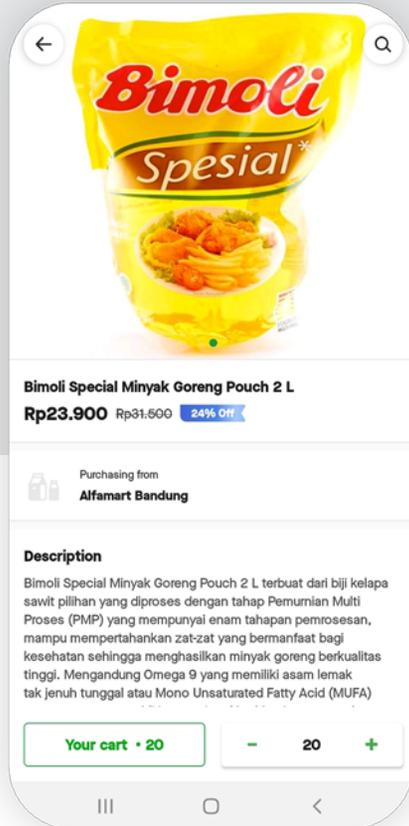


Halodoc
Indonesia



Doordash
U.S.

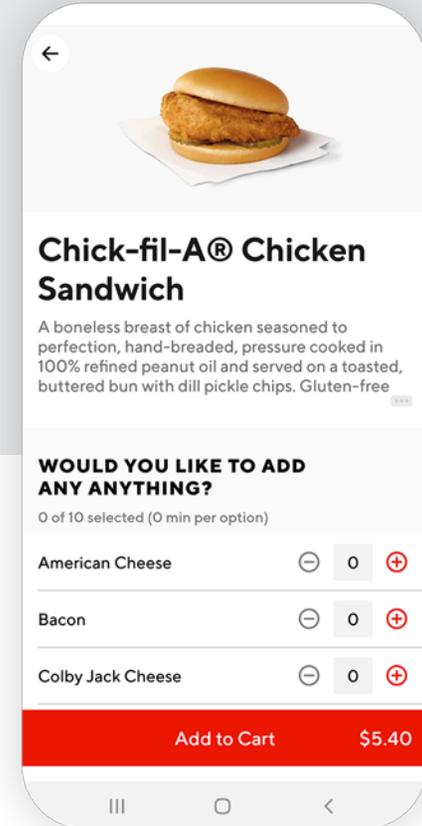
Product detail



Gojek (GoFood)
Indonesia

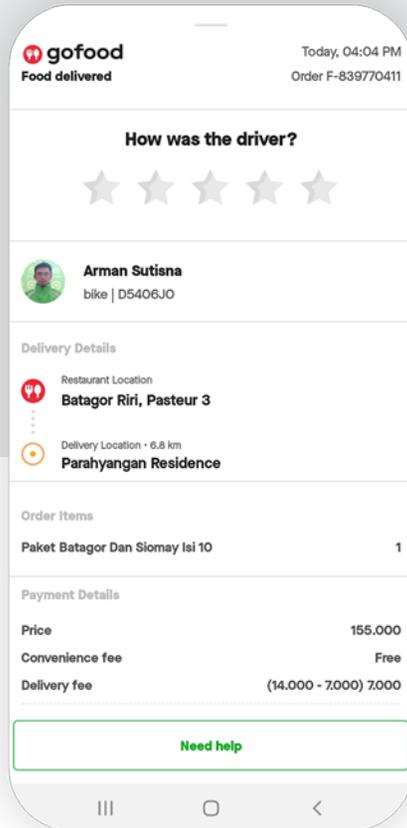


Halodoc
Indonesia
[No product detail](#)

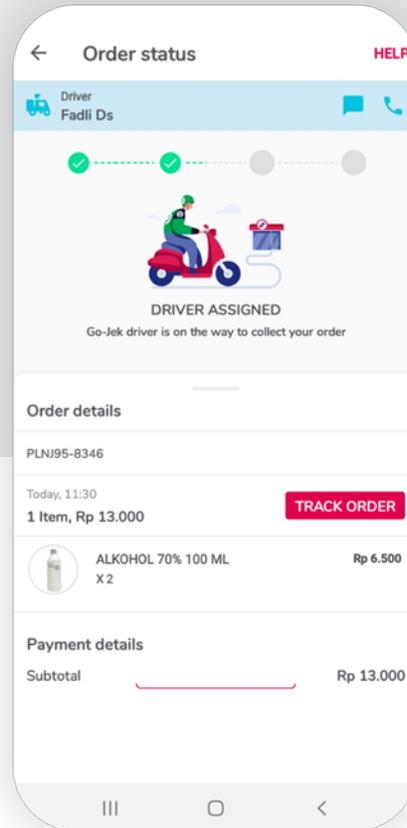


Doordash
U.S.

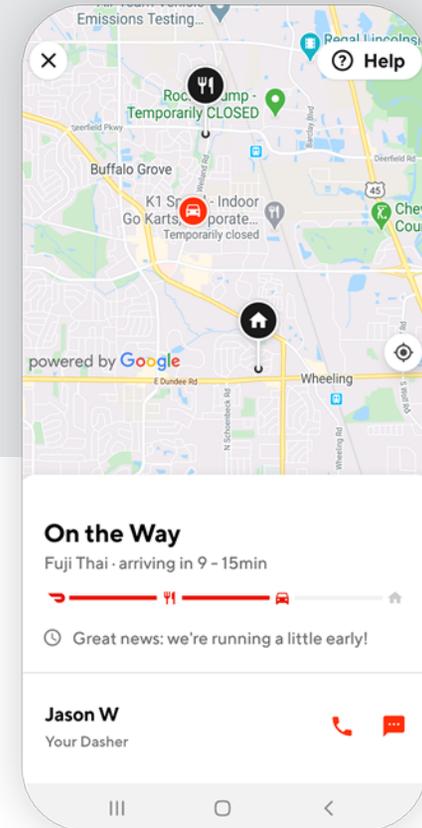
Shipment tracking



Gojek (GoFood)
Indonesia



Halodoc
Indonesia



Doordash
U.S.

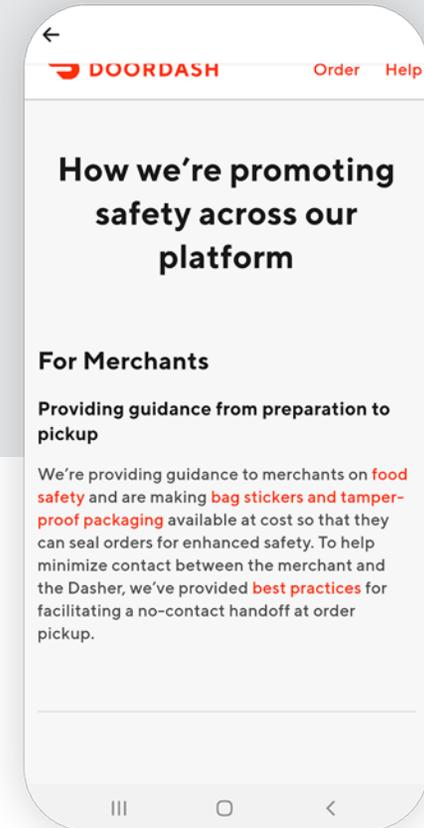
Statements on health and support measures regarding the emergency



Gojek (GoFood)
Indonesia

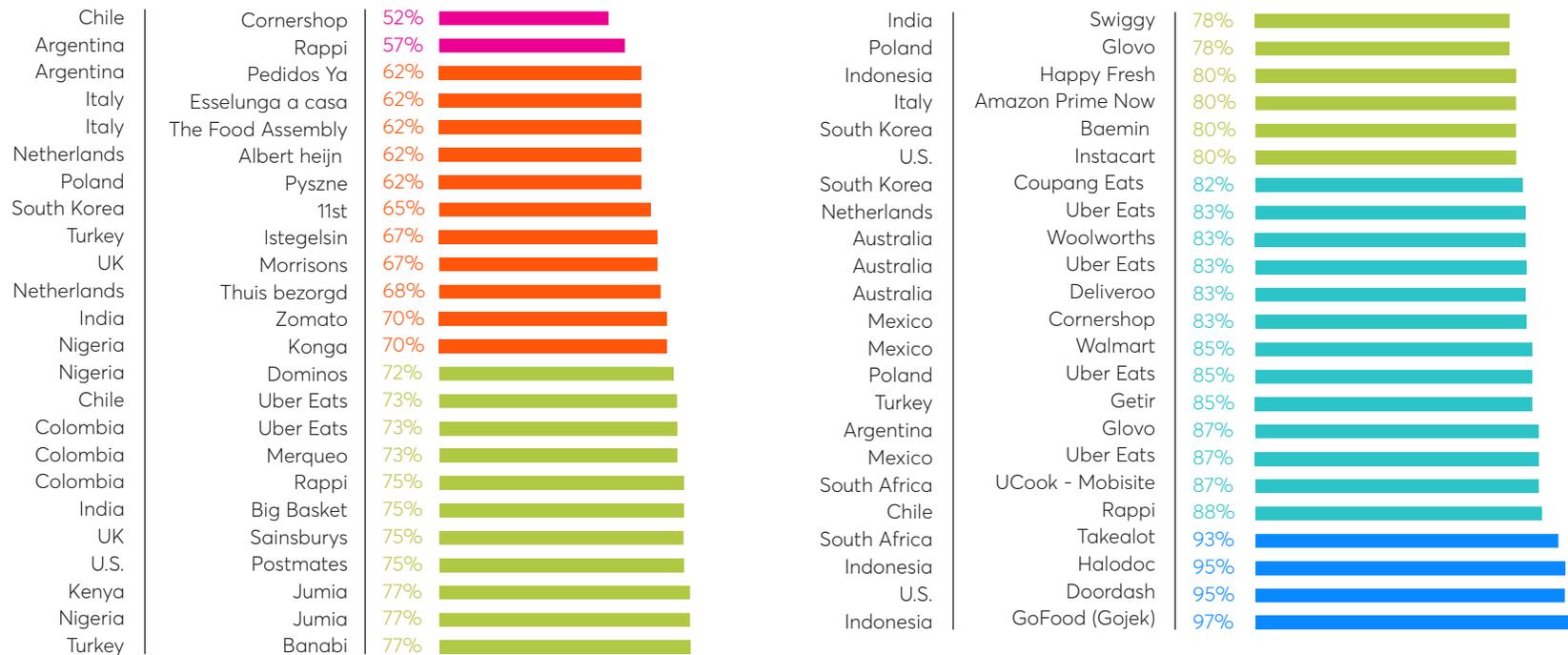


Halodoc
Indonesia

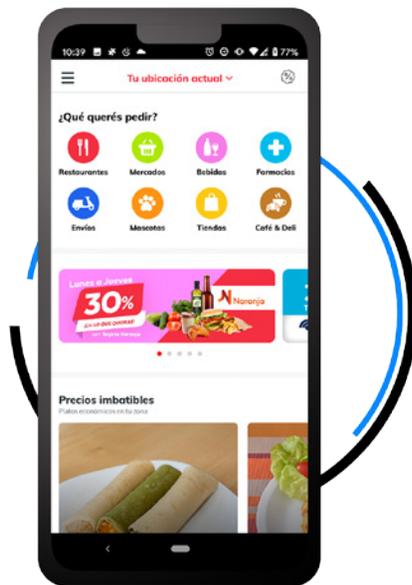


Doordash
U.S.

Highest UX Score



CX Score



Pedidos Ya!, Argentina.

What we analyzed:

- Is the customer service and support experience satisfactory?
- How is the app experience in terms of fulfillment? Is the delivery service fulfilling?
- How are applications doing in terms of returns processes?

What we found:

In the three areas of the comparative analysis, average and low ratings were found. However, for most applications the fulfillment effectiveness criterion stood out, where efficiency and customer satisfaction for the delivery of products are addressed.

The areas of support effectiveness and returns effectiveness did not seem to be a priority for most of the analyzed applications due to their low ratings. Below, we detailed the basics of the applications.

Support efficiency

Good practices

Applications with direct communication tools obtained the best ratings due to the quick solution of issues. However, not all of them had active channels or these were difficult to find.

Direct communication tool	Application
Chat	Glovo (ARG), Woolworth (AUS), Deliveroo (AUS), Swiggy (IND), Zomato (IND), Big Basket (IND), Halodoc (IDN), Esselunga a casa (ITA), Baemin (KOR), 11St (KOR), Banabi (TUR), Instacart (USA), Merqueo (COL)
Instant messaging (Kakao Talk, Whatsapp)	Baemin (KS)
Call center	Deliveroo (AUS)*, Swiggy (IND), Gojek (IDN), Halodoc (IDN), Amazon Prime Now (ITA), Esselunga casa (ITA), Jumia (KEN), Walmart (MEX), Domino's (NGA), Takealot (ZAF)*, Coupang Eats (KOR), Getir (TUR), Sainsbury (GBR), Morrison's (GBR), Doordash (USA)

*Deliveroo (Australia), and Takealot (South Africa) did not have these options due to the pandemic. In the case of Takealot, they warned the users that their employees were teleworking, for that reason the only access to support was via email.

Due to the limitations caused by COVID-19, some applications had to implement specific contact schedules, as was the case of **Ucook** (South Africa), notifications on delays in the service like the case of **Uber Eats** (Poland) or even the elimination of channels as in the case of **Takealot** (South Africa).

Accessibility for people with hearing impairment. The job of **11St** (South Korea) and **Sainsbury's** (UK), is to be recognized; they have a care center with sign language.

Opportunity areas

- **Support sections with poor accessibility or confusing for the user** were rated with mid or low scores, like in the case of **Jumia** (Nigeria), or were qualified as very confusing, like **Walmart** (Mexico).

On the other hand, even though the user can find a list of solutions to the most common issues, according to the perception of the apps, these may result limiting in case the concern is different.

- **Contact forms.** Although these are used by most applications, they are rated as inefficient. While the answer to a question regarding a shipment through **Pyszne** (Poland) took 24 hours, no answers were received from **Cornershop** (Mexico) and **The Food Assembly** (Italy). **This kind of tools is not allowing users to solve their issues in real time.**

Fulfilment efficiency



Esselunga a casa, Italy

Good practices

- [Amazon Prime Now](#) (Italy), [Esselunga a casa](#) (Italy) and [Postmates](#) (U.S.) are some of the few applications that offered users alternative products in case one of them is unavailable. Most try not to post the product in order to avoid mistakes, or as in the case of [Banabi](#) (Turkey), they display a “sold” message.
- Easy-to-understand delivery processes were seen in most applications.
- **The real-time maps tool got the highest ratings.** Applications complied with informing the progress of the orders, even when there was a delay of days. An example of it is [Amazon Prime Now](#) (Italy) that due to the high demand did not make 2-day shipments, but kept users informed on the status of the order.
- **General notifications on potential delays, regarding both deliveries and the customer service section.** This information moderated the users’ expectations and made them more flexible in light of the current situation.

It is interesting that most applications got outstanding or very good ratings under this criterion.

Opportunity areas

- If there was an issue with the shipment, most applications suggested solving it with the delivery person through direct communication channels. **The responsibility of the service falls back onto them.** It is the case of **Uber Eats** (global) and **Rappi** (LATAM).
- Regarding Italian applications, the difficulties to find scheduled delivery slots was mentioned, thus lowering the rating of **Amazon Prime Now**, **Esselunga a casa** and **The Food Assembly**.

Returns efficiency

This section received the lowest scores in all applications.

Some apps, like **UCook** and **Takealot** (South Africa) accepted returns, but due to the worldwide health issues they cancelled this service. It is understood that this option is taken in light of the situation, which is why it is not necessarily considered a bad practice.

Opportunity areas

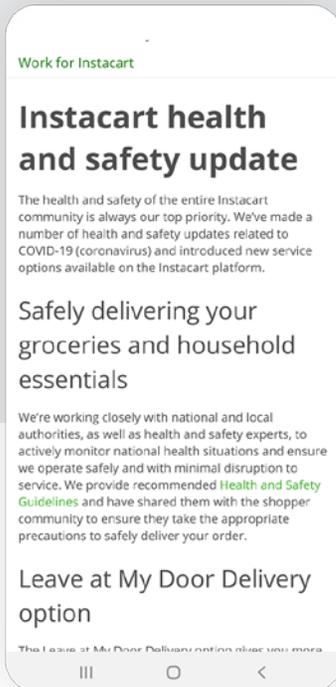
- In general, **returns processes were hardly ever found.**
- In most food delivery applications, there were no food return policies, just for cancelling or reporting an inconvenient with the order. However, **when there was a problem with the food, the user was expected to be responsible for solving the problem directly with the store or restaurant.** The application did not consider processing the claim, although the user might expect so.

Top 4: outstanding customer experience

The applications rated with an outstanding customer experience were: [Instacart](#) (U.S.), [11St](#) (South Korea), [Gojek](#) (Indonesia), y [Doordash](#) (U.S.).

Application	Country	CX Score	CS Score %
Instacart	U.S.	61 / 70	87 %
Gojek (GoFood)	Indonesia	59 / 70	84 %
11St	South Korea	59 / 70	84 %
Doordash	U.S.	59 / 70	84 %

Best costumer experience



Instacart

U.S.

Section with information on protection against COVID-19



Gojek (GoFood)

Indonesia

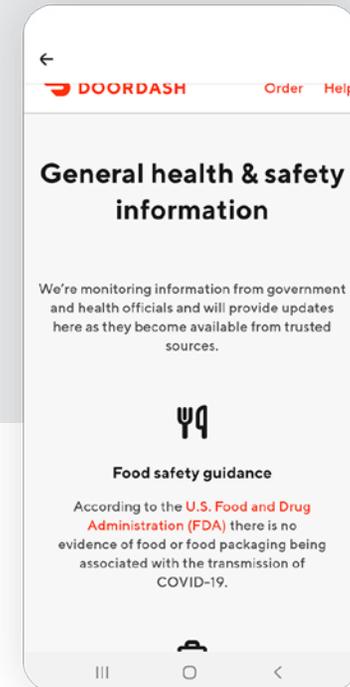
Section with information on protection against COVID-19



11St

South Korea

Section with information on protection against COVID-19

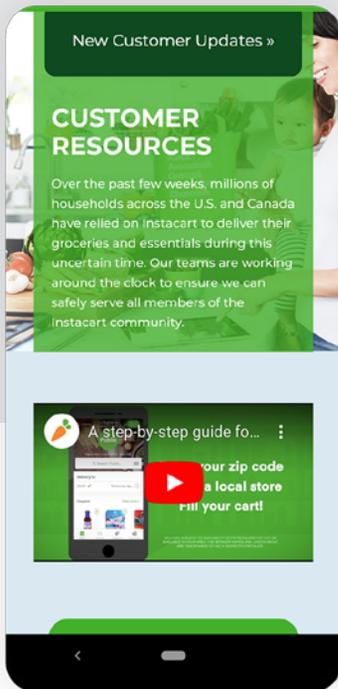


Doordash

U.S.

Section with information on protection against COVID-19

Best customer experience



Instacart

U.S.

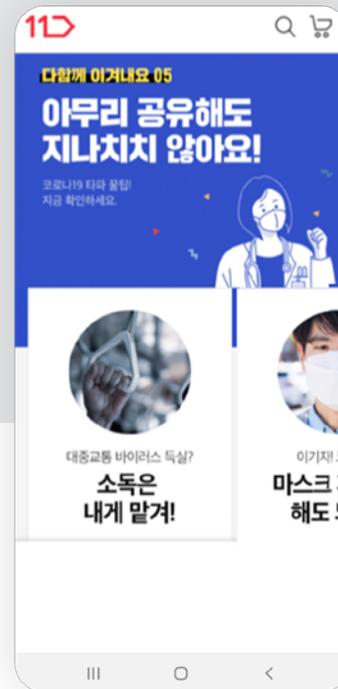
Information on protection for customers.



Gojek (GoFood)

Indonesia

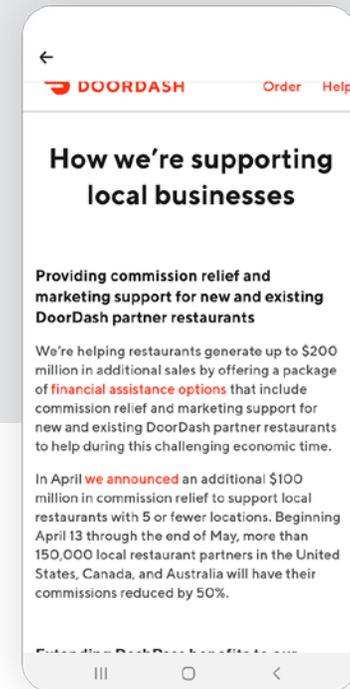
Protection protocols for the safety of all actors in the ecosystem.



11St

South Korea

Information on protection for customers.



Doordash

U.S.

Support information for all actor of the ecosystem.

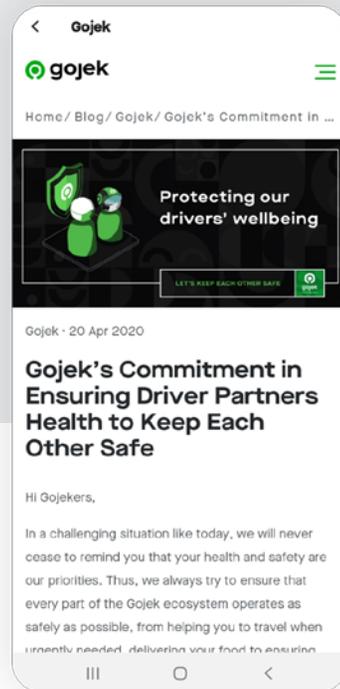
Best customer experience



Instacart

U.S.

Protection protocols from Health Institutions.



Gojek (GoFood)

Indonesia

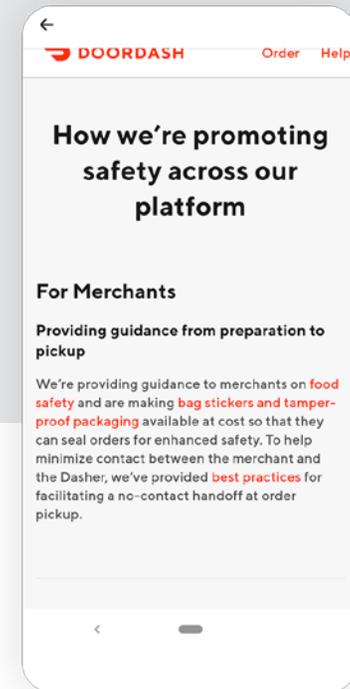
Protection protocols for the safety of delivery people and customers.



11St

South Korea

Recommendations to avoid the spreading of the virus.

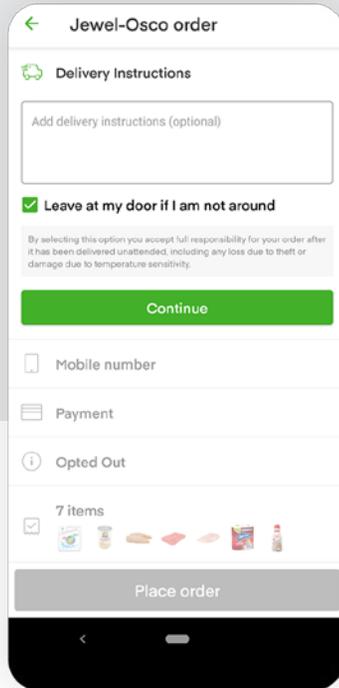


Doordash

U.S.

Protection protocols for each actor of the ecosystem.

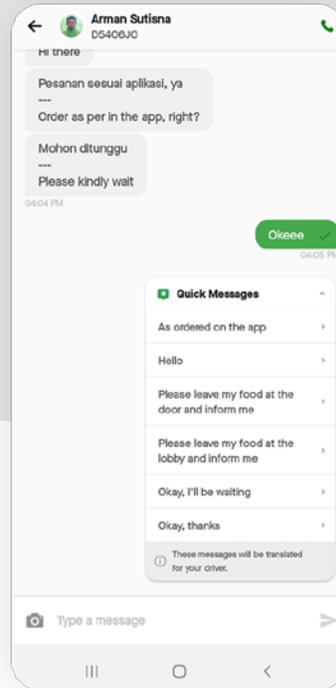
Best costumer experience



Instacart

U.S.

Additional delivery instructions.



Gojek (GoFood)

South Korea

Direct communication through chats and quick messages.



11St

U.S.

Customer service through chat and phone call.

In terms of customer experience, the applications that stood out in this metric share the following features:

- Multiple channels for support and communication with the user.
- Notifications on issues or delays in the service due to the current situation.
- Specific information on COVID-19 (some even had a specific category with information).
- Their delivery times remained the same as before COVID-19.

These applications consider communication with the user one of their main tools for a transparent and high quality customer service. They are concerned about leveling the expectations of their users in light of the context.

For instance, [Instacart](#) (U.S.) made available for the user three different channels to find support information. The application had a section dedicated to COVID-19, a chat and direct communication with the delivery person.

As mentioned above, [11St](#) (South Korea) is one step ahead and has a care center with sign language for users with communication issues.

Opportunity areas: customer service and information accessibility

Application	Country	CX Score	CX Score %
The Food Assembly	Italy	14 / 70	20 %
Thuis bezorgd	Holanda	14 / 70	20 %
Pyszne	Poland	22 / 70	31 %

The reason why many applications in this study did not reach an excellent rating, is due to the poor or inexistent response from their customer service.

In addition, the most common issues found were:

- Few tools for direct communication between the user and the application. Most applications had open text fields, but messages were not answered. If they were, they had long response delays (days) with regards to the day of the inquiry.
- Difficult access to instructions or frequent questions on COVID-19.
- Information regarding COVID-19 and measures taken were rated as unsatisfactory: their concerns were not fully answered or they did not find an accurate answer on the website.
- They did not offer alternatives when a product was no longer available.

The rating of the applications in terms of customer service was generated as follows.

Highest CX Score

Note: Istegelsin (Turkey), is not in the above chart, since a purchase could not be completed at the time of this study in order to evaluate the experience in terms of customer service.



Domestic contexts and highest-rated apps

Is there a relation between the proactivity of the apps and the Governments in terms of looking after their ecosystem?

In the analysis of the applications, contexts cannot be left aside. Each application had to make adjustments according to the regulations of the countries where they operate and, while some implemented strict measures for their citizens, others took too long to react.

It results interesting to identify the fact that apps rated with the best user experience and that were proactive in terms of looking after their ecosystem and community, operate in countries that are above the average regarding the implementation of measures and protocols for their citizens (as in the case of South Korea) or way below the average, due to their slow response (as in Indonesia and the U.S.).

Two examples

Indonesia

Gojek

- Rated as the application with the best user experience in this study.
- The implementation of COVID-19 prevention measures did not come immediately after the first cases of infected people.
- The perception is that citizens were concerned about implementing measures to prevent the spreading of the virus and the hunger situation in the face of the economic plunge before the Government. Alternatives were created to ensure their economic well-being during confinement, until putting together their community life in order to get supplies among neighbors.
- Within the same context, Gojek (GoFood), an application that offered food delivery services, faced the pandemic:
 - Informing users on the latest news on COVID-19.
 - Providing disinfection supplies for their delivery people, as well as in their resting spots.
 - Creating alliances with other health applications.
 - Involving all actors of their ecosystem in the fight against the spreading of the virus.

South Korea

11St

- On the contrary, South Korea, had an efficient response to COVID-19 with the activation of measures such as multiple economic aids, strict legal consequences for not complying with protective measures and border closures.
- From this perspective, 11St, a mixed-product application:
 - Taught users how to avoid the spreading of the virus.
 - Supported local businesses with a dedicated section.
 - Promoted positive messages for affiliated businesses.
 - Supported "neighbors facing difficulties" during COVID-19 donating 100 won (US\$0.08) per comment received.

→ Survey



User's point of view

Who did we survey?

Germany, Argentina, Australia, Belgium, Canada, Chile, China, Colombia, South Korea, Costa Rica, United Arab Emirates, El Salvador, Spain, The United States, The Netherlands, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, New Zealand, Peru, Puerto Rico, United Kingdom, Dominican Republic, South Africa, Switzerland and Turkey.

In all countries part of the survey, Governments took confinement measures or mandatory quarantines.

331

Number of participants

30

Surveyed countries

18

to

70

Years old

What we analyzed

As mentioned above, although it is not a statistically representative survey, its objective is to generate an approach to the transformations during this pandemic period in terms of product consumption -especially essential ones- through delivery apps. It sheds some light on people's reasoning regarding how, when and why buying the way they do.

Through a complementary survey, we wanted to get closer to the behaviors and emotions that people experience around the world during the pandemic at the time of purchasing prepared meals, groceries and drugstore items.

- What emotions do you experience at the time of shopping through delivery apps while in confinement?
- What are the purchase behaviors, frequency and habits of people before and during the pandemic? What changes have they faced?
- What emotions do they experience when shopping in physical businesses during the pandemic?
- How often are delivery apps used during the pandemic?
- What are the item preferences at the time of buying through this kind of application?

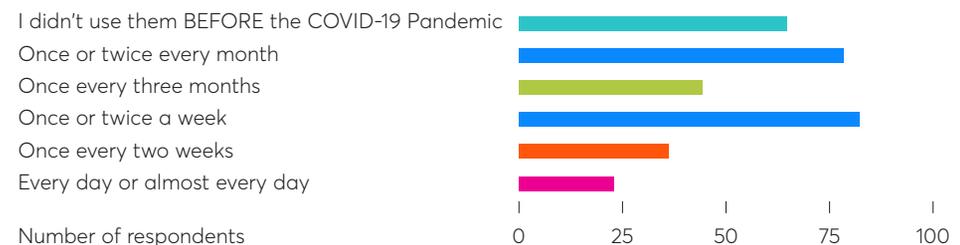
What we found

Purchases through delivery apps.

Before the pandemic, what habits did delivery apps users have?

- **81%** used delivery apps before the pandemic.
- **25%** claimed using them once or twice a week.
- **11%** once every two weeks and **23%** once a month.
- **38%** of the participants who did not use delivery apps claimed they preferred choosing items personally at the store, supermarket or restaurant.
- 5% mentioned the uncertainty regarding the proper arrival of the orders, 3% the lack of trust in payment methods, and another 3% claimed not knowing how the apps worked.

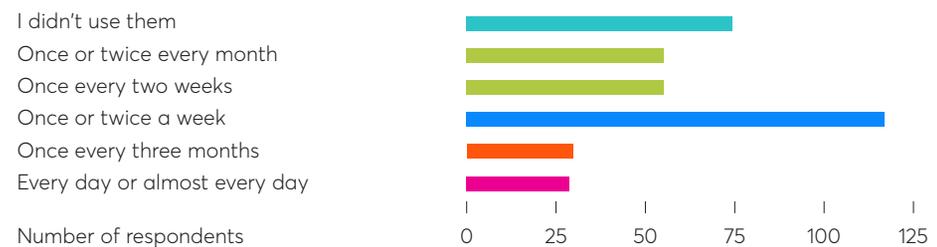
How often did you use delivery apps **BEFORE** the COVID-19 pandemic?



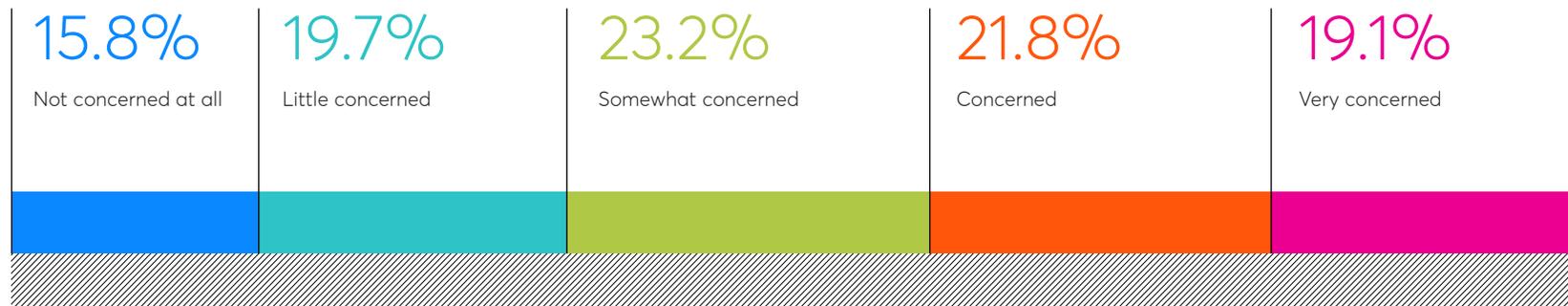
During the pandemic, did usage habits of delivery applications change?

- **41%** of the participants who did not use delivery apps, started using them due to the pandemic.
- **22%** of the survey respondents that still don't use delivery apps, mentioned the following reasons:
 - **48%** still preferred choosing items personally in the store, supermarket or restaurant.
 - **36%** did not have information on how businesses were handling biosafety.
 - **9%** were not sure the order would arrive properly.
 - **7%** did not trust digital payment methods.

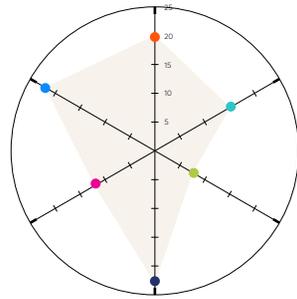
How often do you use delivery apps **DURING** the COVID-19 pandemic?



Were users concerned about getting infected with COVID-19 when ordering food through delivery apps?

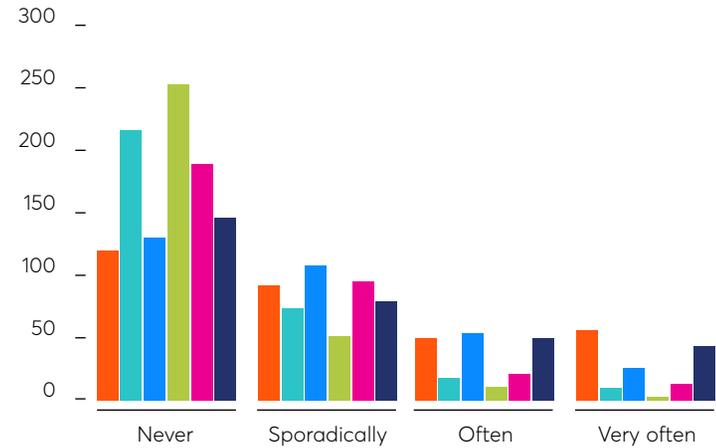


- Groceries
- Drugstore items
- Fast food
- Liqueur
- Desserts
- Meals



20.1%
15.1%
22%
7.6%
11.9%
23.3%

What was purchased through delivery apps?



If you use delivery apps, what are your most frequent purchases?

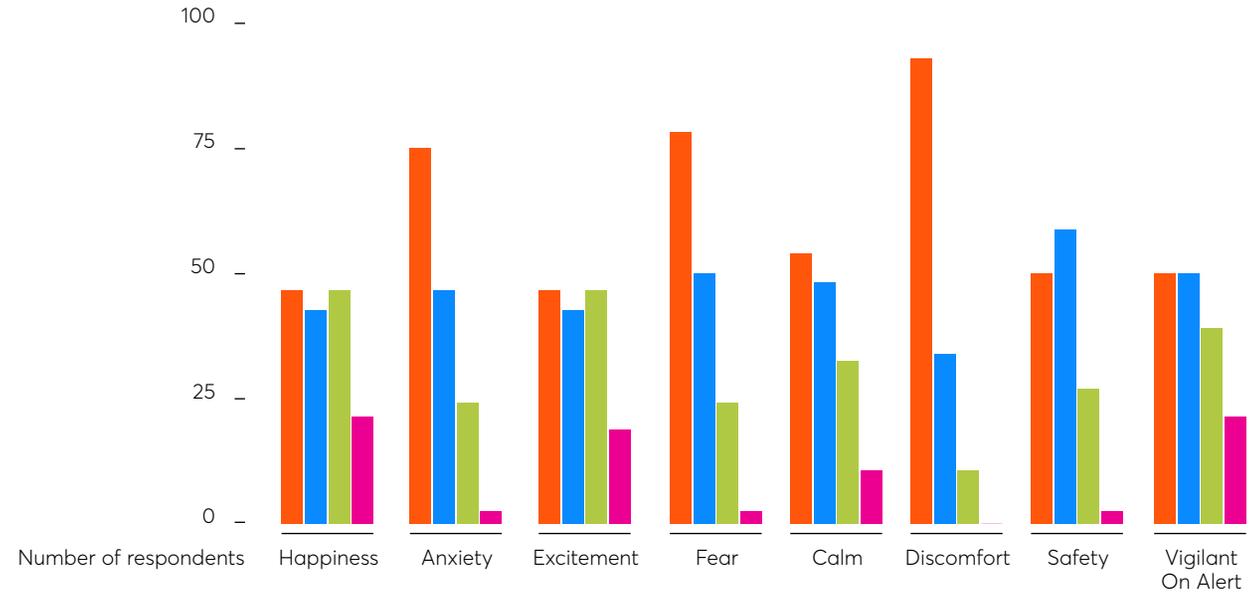
What are users buying more frequently through delivery apps during the pandemic?

In order of frequency, the purchases correspond to:

- Restaurant food: **23%** prepared meals for breakfast, lunch and dinner.
- Fast food: **22%**.
- **20.1%** groceries.

When receiving a package of food, groceries or medicines through a delivery app, what kind of emotions do you have?

- Never
- Sporadically
- Often
- Very often



**Emotions:
What does receiving a delivery represent?**

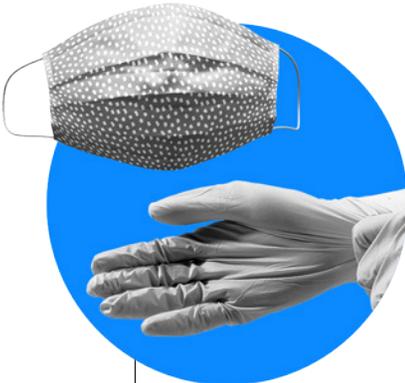
- When receiving a delivery, **37%** of the survey respondents claimed not having negative emotions such as anxiety, fear or discomfort.
- Oftentimes most experienced happiness, enthusiasm, calm and confidence; just **25%** experienced a sense of alarm.

What preventive measures does the user take when receiving a delivery?



71%

Alcohol and antibacterial gel



48%

Face mask and/or gloves



48%

Contactless delivery



52%

Contactless payments

What we found

Grocery purchases during the pandemic.

Purchasing frequency and method: Have the user's habits changed?

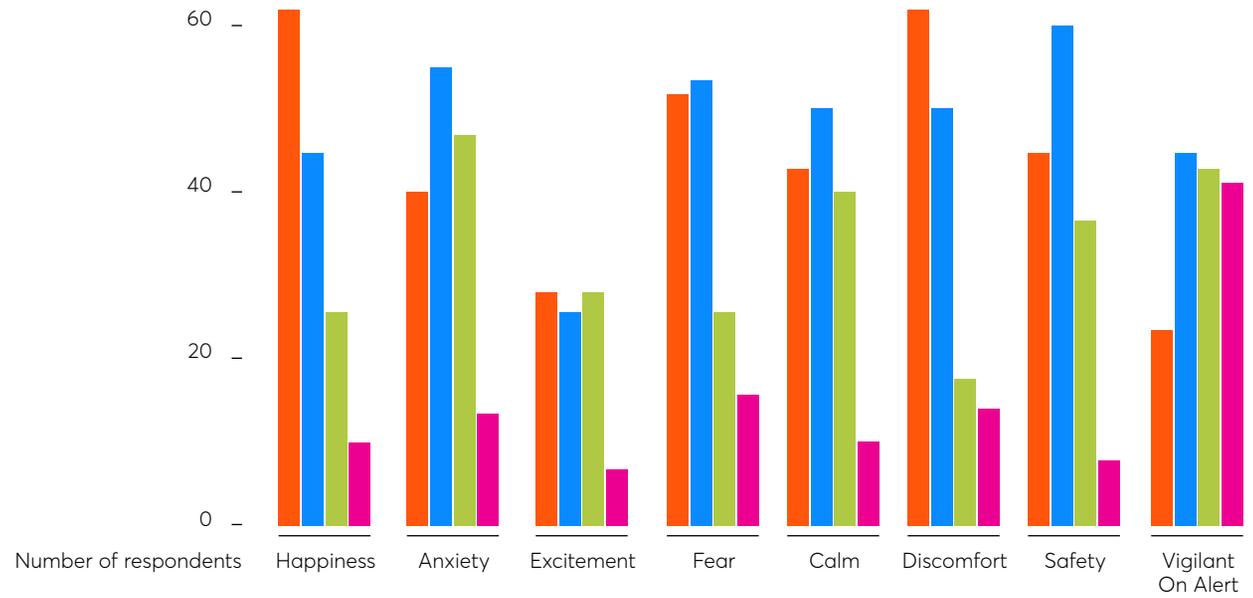
- **77%** of the survey respondents changed the grocery shopping frequency during the pandemic. **53%** of the survey respondents said purchases are less frequent.
- **56%** claim their way to buy or obtain groceries changed. **32%** now do it through a delivery app or website.

Emotions: What does going out shopping or doing it at home represent during the pandemic?

- Although the feelings of happiness, thrill or unease did not stand out, some occasionally expressed feeling anxiety, fear and a sense of alarm.
- Those who stopped making in-store purchases or those who made them less frequently claimed missing the sensation of touching and smelling the food, as well as calmly walking down the aisles with relatives and friends, being amazed and feeling like buying.
- They mentioned that now there is not as much variety, they take a shopping list with them, go straight to the necessary and act fast.

If you still go to supermarkets or stores during the pandemic, what kind of emotions do you have when going for your groceries?

- Never
- Sporadically
- Often
- Very often



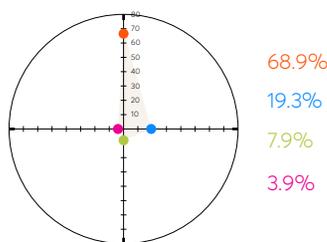
What we found

Prepared meals purchases during the pandemic

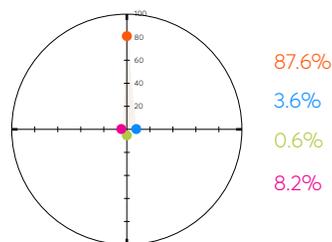
Purchasing frequency and method: Have the user's habits changed?

- The way of buying prepared meals changed for **69%** of the survey respondents. Within this group, most stopped going out to restaurants and started cooking at home.
- **27%** now buy their prepared meals through an app and only **11%** stopped placing online orders.

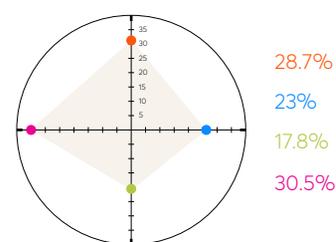
● Never ● Sporadically ● Often ● Very often



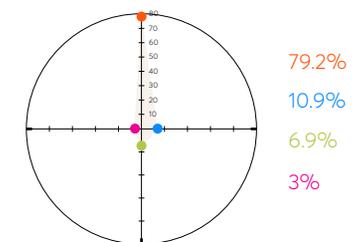
I go directly to the restaurant.



I ask someone to buy it for me and go to the restaurant.



I order my food through a delivery app or website.



I ask someone to order the food for me through a delivery app or website.

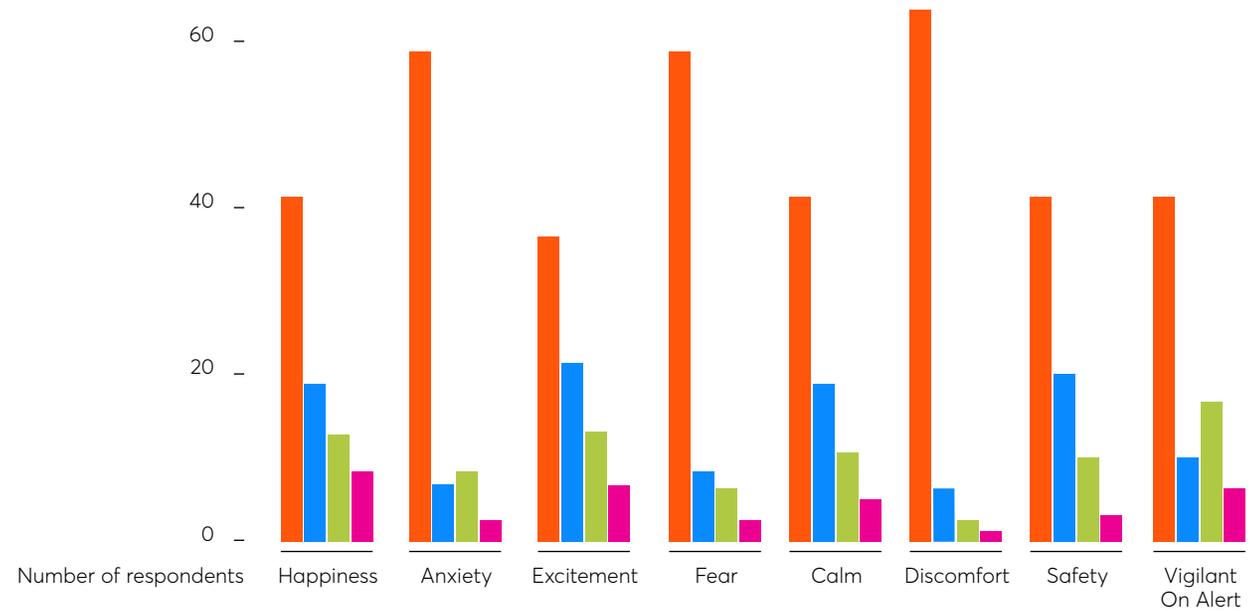
Emotions:

What does going out to restaurants or not doing it represent during the pandemic?

- Most survey respondents claimed missing going out with friends and family, interacting, having fun, going to a place just for pleasure and not as an obligation. Likewise, they miss the experience of eating in restaurants and sharing, having at hand a variety of flavors without depending on their own skills to prepare food.
- A few still go to restaurants, fast food restaurants or dessert shops, they are mostly young adults ages 25 - 35 in Mexico and the United States. This group did not express negative emotions (anxiety, fear, unease or sense of alarm), on the contrary, they sporadically felt enthusiastic and confident.

If you still go to restaurants or food stores, what kind of emotions do you have when going for a meal, fast food, or a dessert during the COVID-19 Pandemic?

- Never
- Sporadically
- Often
- Very often



- Regarding prepared meals, **69% of the survey respondents changed the frequency of the purchases.** For 61% of them it was less frequent.
- **34% of the survey respondents buy prepared meals once or twice a week;** 19% once every two weeks; 19% once a month and 20% do not buy prepared meals. Just 8% buy prepared meals almost every day.

What we found

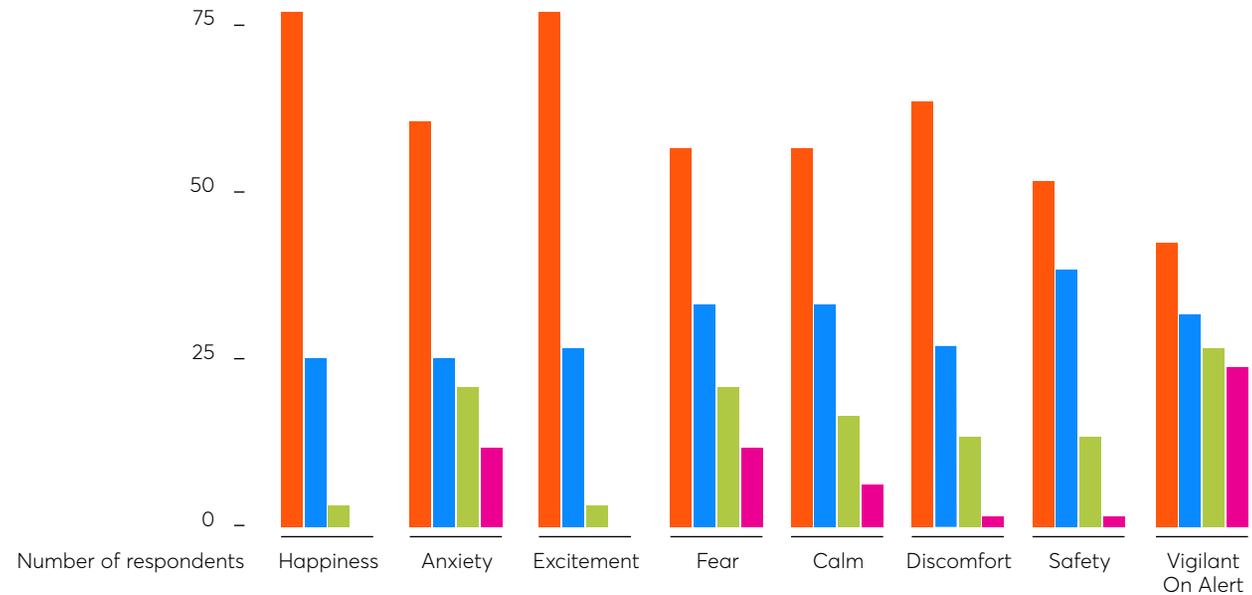
Drugstore items purchases during the pandemic

Purchasing frequency and method: Have the user's habits changed?

- **47%** claimed changing the way they buy drugstore items. Most do so through digital platforms instead of going to the drugstore.
- **37%** of the participants expressed that they buy drugstore products more frequently than before.
 - Of that 37%: 34% do it sporadically, 30% once a month, 25% every two weeks and 9% once or twice a week.

If you still go to pharmacies during the pandemic, what kind of emotions do you have when going for medicines or other items?

- Never
- Sporadically
- Often
- Very often



Emotions: What does going out to a drugstore, or not doing it, represent during the pandemic?

- **42% of the survey respondents still go to drugstores** and claim not feeling changes in their emotions when they arrive to the place.
- Most of them, young adults (ages 18-24) living in countries like Mexico, Colombia, India and the U.S.
- **28% of the survey respondents that sporadically made in-store purchases, mentioned emotions that range from enthusiasm and calm, to fear, unease and a sense of alarm.**



Challenges

What can be learned?

*The content presented below gathers the conclusions of the team of consultants part of this research regarding the analyzed information.

Sufficient and accessible information

Generating good communication **-sufficient, accessible and contextual information-** about the impact of the pandemic on the service and the commitment of the apps towards health in general, is the response to many issues that may arise in the user's experience.

This is a decision that does not require much development and that has been made by most of the apps in this study in the shape of 'statements', 'Help' articles or 'Frequently Asked Questions'.

Is a statement enough?

Making information contextual to the path users follow, is more relevant than having a complete statement in a specific section.

In other words, it should be responsive and visible for the user when required:

- For example, a notification or banner on the home screen, if there are questions related to the service in general.
- An announcement that gives peace of mind in case of product shortage or substitution alternatives at the time of the selection.
- The possibility to see, from the restaurants category, health protocols that are being implemented.

Of course, it is recommended to provide information, as appropriate, to give the user peace of mind instead of a sense of anxiety or alert, considering the excess of information on COVID-19 that people may be experiencing.

What happens when an app decides to totally avoid the topic?

Not communicating anything regarding the global emergency situation is minimizing not only a major issue, but also the emotions and concerns someone may be going through.

This means, in other words, not paying attention to the needs of end consumers. Not acknowledging the severity of an issue, and not treating it diligently, may have a negative impact on the reputation of a product. It is an error in crisis management.

Now, some applications opt not to use words such as 'COVID-19', 'pandemic' and 'coronavirus'. Although transparency and direct language with a warm tone, may generate trust and peace of mind, omitting certain words is not necessarily a bad practice. Something that will always be relevant is meeting people's needs and answering questions like the following: Am I inspiring the trust the customer requires? Have I made inquiries regarding the language and tone I use with my customers? Have I validated the fact that my segment perceives direct language negatively? Is my audience tired of the topic?

On the other hand, this study found applications that made several changes in a short time frame in order to address the emergency, but these were so frequent that interfered with the user experience.

Shared responsibilities: interaction and taking care of the ecosystem

In times of crisis, these show the strength or fragility of the ties between the applications and their affiliated businesses, own shops, suppliers, shoppers, delivery people and end users. At the same time, this tests their capacity to react and adapt as a single ecosystem.

Apps: más allá del puente entre producto y cliente final

The enormous role of applications as platforms working with affiliated businesses, own stores, suppliers, shoppers, delivery people and users is evident in the **strength or fragility of the ties between them in times of crisis.** Thus, it is also reflected in their capacity to react and adapt as a single ecosystem.

It is clear that a pandemic, as a unpredictable predicament that affects each one of the links of the chain, requires that assistance is provided for all of them. The fact that some applications have given more relevance to certain stages -or at least related to what the end user can see- allows perceiving the work that is to be done.

Efforts aimed at the end consumer are acknowledged

- Banners, statements, hashtags and the expansion of frequently asked questions about the situation.
- Discounts in an affected economy are appreciated, as well as contactless deliveries.
- The calmed and warm tone of most of their statements, as well as the new sections to highlight essential products or communicate priorities in delivery times.

It is clear that, although there are opportunities for improvement (which will be later explained), the end consumer has had an essential relevance in terms of the focus of primary adaptation decisions in the face of the pandemic. Having said that, in times of crisis and transformation, it is frequent to see that this immediacy is focused in just one stakeholder when it is of the essence not to leave the others unattended.

The comparative exercise of this research makes us pay close attention to what is poorly communicated or to what is said just by a few apps on their platforms:

- Health and cleaning cares in affiliated businesses or own warehouses.
- Economic aids for partners and affiliated businesses.
- The constant care for the shoppers.
- Hygiene measures in food preparation.

Responsibility of the apps regarding shoppers and delivery people

An informed and solidary user will be in charge of checking which applications are implementing ethical strategies for their direct workers or those who work on their behalf, and this will be an important factor to influence the purchase decision.

An application that previously did not worry about looking after or supporting affiliated businesses, shoppers and delivery people faces a greater challenge to show users what it is doing now. News in mass media and social networks complaints abound nowadays.

In the case of shoppers and delivery people, it is surprising that the support for 'front line' workers, for most applications is limited to the provision -and usage suggestion- of protective equipment such as face masks, antibacterial gel and gloves.

The fact that only five, out of 47 applications, mentioned financial aids in case of getting infected with COVID-19, and just one, [Postmates](#) (U.S.), claimed that for the whole adaptation process of the app, they were taking into account feedback and comments from delivery people.

How to make sure hundreds of delivery people wear their face masks properly if they don't feel they are being looked after?

How to guarantee a prudent distance when making a delivery if the pressure to deliver the next order forces them to do things discouraged and carelessly?

How to build a sense of belonging and responsibility in a delivery person whose working conditions are not responsible enough?

There is a notorious difference between apps in which delivery people are direct employees (as the case of supermarkets) and those in which delivery people are considered 'associates'.

This can be seen when there are clarifications regarding health instances, and when the tip suggestion, in some cases, is omitted. In any case, the tip turns relevant as it becomes a way to pass end consumers the responsibility of dignifying salaries for delivery people and shoppers.

In an ideal scenario, to the extent that the necessary precautions are taken to make sure supermarkets, restaurants and stores are not contagion hotspots, individuals who shop or pick up an order are looked after as well.

The reviewed applications expose how easy instructions can make a difference: **Thuis bezorgd** (Netherlands) asked the stores to provide hand sanitizer for them and **Instacart** (U.S.) asked some affiliated stores to make sure shoppers avoid long lines or to only allow them to enter.

Responsibility of the apps to affiliated businesses or suppliers

Stores, restaurants and suppliers have been the most affected by the economic plunge caused by the social confinement generated by COVID-19. Their stability has heavily relied on the operation of online delivery platforms, to whom they pay for using their services.

Although these are actors of the ecosystem that may not expect to be treated with the same relevance of an end user since they are part of the workforce, they should be looked after equally as part of a business strategy -and not least important during this circumstances- as well as an act of responsibility and empathy.

Looking after these restaurants or stores must be thought from the economic point of view, but not be limited to it.

Some important examples:

- The elimination of the commission fee as done by **Uber Eats** (Poland).
- The sales of coupons from local stores offered by **Gojek** (Indonesia).
- The support provided by **Doordash** (U.S.) to businesses in terms of communication and marketing strategies.
- The actions of **11St** (South Korea) with suppliers that had the chance to sell elements from cancelled events due to the pandemic, displaying them as featured items.

Strengthening trust, making them feel they are on the same journey, may ensure a better response when it is necessary to jointly work in order to face a crisis.

In the case of applications like **Swiggy** and **Zomato** (India), that announced specific actions (recommended for any other app) asking restaurants to follow some safety standards, **a proper interaction and communication facilitate the follow-up and accompaniment processes.**

End users: responsibility in times of pandemic

Governments do their part asking citizens to comply with the confinement in order to prevent the high spreading of the virus in a short period of time. Ordering food or getting supplies through a delivery, give individuals a perception of safety considering that there will be contact -if any- just with one person, making them feel they are doing their part.

Reality is -and the dilemma they would face- that they are most likely transferring this responsibility to another person who has to do their job out there, someone who will be in charge of interacting with cashiers and other workers of the chain. The comfort of some, ends up being a risk for others; a risk that is taken when facing any kind of requirement.

Through the survey complementary to this study (and whose results are exposed in above sections) it was evidenced that **23.2%** of the survey respondents that use delivery apps are buying prepared meals for breakfast, lunch and dinner, **22%** buy fast food; the latter is a little higher than grocery purchases that may be considered "essential". To a lesser extent, desserts and alcoholic beverages are found, for those who are allowed.

What should applications be in this scenario?

Reinforcing the above, to the extent that safety throughout the chain is ensured -and properly communicated- these dilemmas are lessened for end consumers. Likewise, considering aspects linked to **empathy and user responsibility** allow **purchase motivations** and care for the other to be kept.

Some examples seen in this study, help to think about the options the applications have:

- Promotion of local restaurants behind closed doors with low-income risks.
- Coupon sales for their subsequent use also from local stores.

- Suggestion of bigger purchases in order to share with neighbors.
- Limited purchases intended for one person ensuring there is no food waste and that products in stores are enough for everybody.

In general, communicating the measures jointly taken can make the difference in terms of trust, credibility and reputation of the apps. It confirms the fact that values preached by companies are developed into actions and that they don't stay just as a corporate text.

Beyond the circumstances, actions regarding responsibility, empathy, communication and the acknowledgement of the needs of people from the ecosystem (not only end consumers) should be rutinary tasks. It is possible to confirm that the impact would hardly ever be negative if such commitment to take care of others is the starting point. Transformations should take into account that behind every protocol, there is something greater: cultural, social, health, economic, political strategies and -above all- people impacted by them.

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