



## Understanding the Food Delivery Application Service Providers in Thailand during the COVID-19 Pandemic through the Aspects of Consumer Behaviours.

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### Abstract

Food delivery services have become one popular way to get food without going out and waiting in a queue. There are two forms of such services: (1) platforms provided by the catering businesses (the brands' websites or mobile applications) and (2) platforms provided by third parties acting as intermediaries (in the form of websites, or mobile applications, which is the focus of this studies). People in Thailand may find it easy to buy food from restaurants or stalls during the normal time. However, during the COVID-19 outbreak, the government is implementing movement restrictions to reduce the risks of infections. This left people with no choice but to rely more on the food delivery services, resulting in a rocket in the food delivery market values. The market attracts more players, which consequently leads to more complex challenges. When writing this paper, no players have been reported to gain the promising-handsome profit. The challenges are intensified by the commission fee ceiling set by the government, while the food conveyers (partners/employees) strike for a raise in pay. It may be prudent for the enterprises to re-conduct in-depth consumer research before continuing in the cut-throat competition. This study begins by revisiting theories on consumer behaviors, three dominant pre-existing technology adoption models, and the current situations in Thailand. Moreover, the researcher provides suggestions for both business practitioners, as well as consumers to better understand the ongoing trends.

**Keywords:** *Technology Adoption, Food Delivery Applications, Involuntary Adoption, COVID-19*

### 1. Introduction

The COVID-19 crisis has been causing the whole business world massive troubles. Many businesses suffer from not running normally or failing to connect with customers like previously. These troublesome situations vary from business to business, depending on the industry and size of the business cooperating.

In particular, food catering businesses, including restaurants, suffer a loss from not being capable to operate thoroughly. In the meantime, with more public cautiousness and government regulations, consumers have been asked to conduct self-isolation and avoid going out. This leads to a massive increase in the e-commerce and food delivery market values (Arunmas, 2021, Cordon, 2022). Significantly, the food delivery industry has a considerable rise in the market value (46.4%) of the previous year and is asserted to continue growing and hit 7.9 billion THB in 2022, making the industry attractive to existing competitors, as well as potential new-comers (Kasikorn Research Center, 2021). At the time of writing, the main competitors in the market are Grab Food, Line Man, Food Panda, Gojek, Robinhood, and ShopeeFood. Each platform has yet to promote its promotions to attract potential customers at the earliest stage where customers are not loyal to any platform—resulting in intense competition among the food delivery platforms.

Online food delivery applications are one form of new technology involving customers to perform specific actions, such as searching for a restaurant, putting orders, pinning the correct location, and paying for the service. Therefore, individuals may have to overcome adoption processes before deciding whether to accept or reject the technology. Nonetheless, the situation of the COVID-19 pandemic may affect individuals in the decision processes. In this paper, I start by introducing two well-known technology adoption models: (1) Technology Acceptance Model (TAM) by Davis (1989) and (2) Unified Theory of Acceptance and Use of Technology (UTAUT and its extended version) by Venkatesh et al. (2003 and



2012). The following section discusses the effect of the COVID-19 pandemic on consumer behaviors by revisiting papers related to involuntary adoption and consumer perceived risks. The last section examines the current situation in Thailand, specifically on the online food delivery services and applications. The summary and suggestions to brands are discussed in the conclusion.

## 2. Objectives

- 1) To examine and better understand Thailand's food delivery service during the COVID-19 pandemic
- 2) To assess the validity of dominant pre-existing technology adoption models in the COVID-19 pandemic
- 3) To understand how consumer behaviors have changed during the COVID-19 pandemic
- 4) To suggest courses of action for businesses, consumers, and researchers

## 3. Consumers and Technology Acceptance

### 3.1 Consumer in the Digital Age

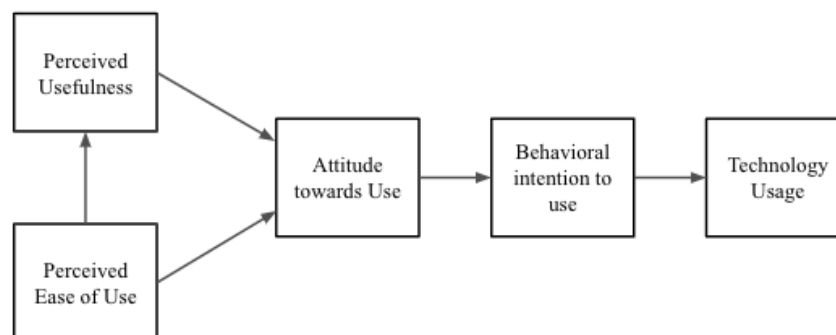
According to Prensky (2001a & 2001b), consumers, nowadays, can be roughly categorized into two groups; either "digital native" or "digital immigrant," based on how they experience the digital world. The former term refers to those born into a time when technology, such as the internet and smart appliances, are the norm or, generally, younger generations born after 1980. The latter term "immigrant" refers to those who may have difficulties learning technology since they were unfamiliar with it from their former stage of life. The two groups have different languages and different approaches to technology adoption. The older group can be more reluctant or slower in learning and adopting new technologies.

### 3.2 Decision on New Technologies

No matter from which group an individual is from, one may go through many thinking processes before accepting or rejecting new technology. Researchers have been proposing various models to explain the logic behind such decisions.

#### 3.2.1 Technology Acceptance Model (TAM)

One of the most popular and most cited models is the Technology Acceptance Model (TAM). It was proposed by Davis (1989) to explain how employees react when introducing new technology to the workplace. The "perceived usefulness" and "the perceived ease of use" of the technology are significant indicators of whether an individual will accept or reject it (see Figure 1). Notably, the easier the technology, the more beneficial the users perceive it to be. In other words, the perceived ease of use also directly affects the perceived usefulness.

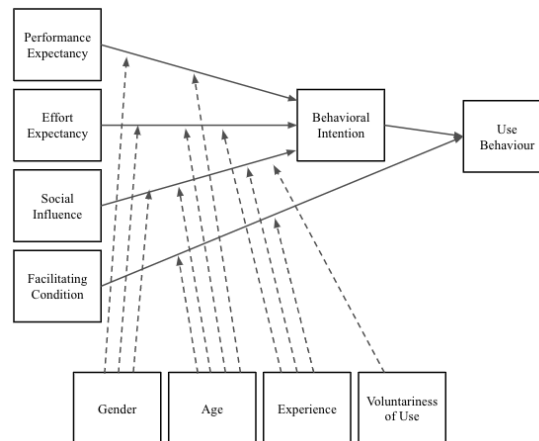


**Figure 1** Technology Acceptance Model (TAM)(Davis, 1989)



### 3.2.2 Unified Theory of Acceptance and Use of Technology (UTAUT)

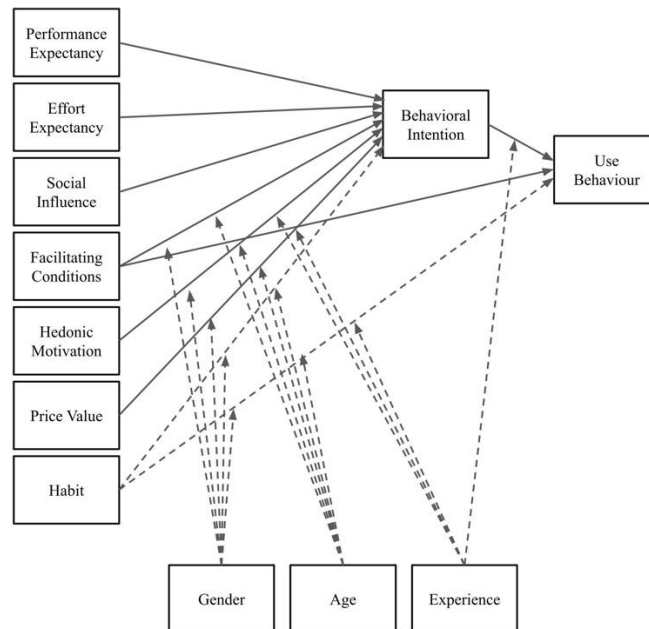
In 2003, researchers attempted to fill the limitation gaps of the preceding models. The team combined eight models from psychology and sociology fields, such as the Technology Acceptance Model (TAM), the Motivational Model (MM), the Theory of Planned Behavior (TPB), and the Social Cognitive Theory (SCT). Venkatesh et al. (2003) then presented a new model- “Unified Theory of Acceptance and Use of Technology (UTAUT)” (see Figure 2).



**Figure 2** Unified Theory of Acceptance and Use of Technology (Venkatesh et al., 2003)

One of the limitations of the preceding models lies in the context of the adoption, as most of the previous studies were conducted in a voluntary adoption setting. Therefore, the researchers proposed “voluntariness” into the model to better comprehend the effects of individuals’ willingness.

Venkatesh et al. (2012) modified the UTAUT by adding three determinants of behavioral intention: hedonic motivation, price value, and habit. They also dropped the voluntariness of use from the extended model because there is no organizational mandate in the consumer studies setting (see Figure 3.3). Therefore, there is no variance using voluntariness.



**Figure 3** Extended Unified Theory of Acceptance and Use of Technology (Venkatesh et al., 2012)

In my opinion, though this new proposed model covers more aspects of individuals' perceptions, it is arguable whether or not the effect of the COVID-19 pandemic has forced consumers to accept new technology (involuntarily).

### 3.3 Involuntary Adoption

Previously, most studies in technology adoption were conducted around voluntary settings, except for those with organizational mandates in place. Arthur (1989) pointed out that even without the orders, other variables might play vital roles in the technology adoption of individuals. For instance, the number of pre-existing adopters might affect the attractiveness of the technology and affect those late and non-adopters in one way or another. Eventually, it might be too costly for individuals just to ignore it (involuntary adoption). Therefore, the decisions are interdependent. Dilaver (2014) suggests that innovation adoption will affect the norms differently, willing adopter, unwilling adopter, and non-adopter.

During the COVID-19 pandemic, individuals are encouraged to avoid social contact by staying home or inside as much as possible. Businesses are requested to follow government COVID-19 regulations, such as shortening their service hours and limiting the number of customers in each period. Though the food delivery application can facilitate the lifestyle during the pandemic, it may have left consumers with no choice but to adopt the technology. Thus, the adoption of food delivery applications can be both voluntary and involuntary.

### 3.4 Consumer Perceived Risks

Researchers started investigating consumer risk in consumer behaviors research as early as 1960. The researcher, Bauer (1960), claims that consumers may be discouraged from performing a particular action if one predicts a high chance of unfavorable results. Jacody and Kaplan (1972) categorize consumer perceived risks into five categories: financial (monetary) risk, performance (functional) risk, physical (health) risk, psychological risk, and social risk. Based on the definition by Jacody and Kaplan (1972),



using food delivery application involve risks in three categories: financial risk, performance risk, and physical risk.

Firstly, individuals may feel reluctant to pay for the online-to-offline services as the users are asked to pay up-front or fill in the payment details (credit or debit card) before getting the service. It also takes considerable effort to cancel and get a refund or compensation if the service was not as good as supposed. Therefore, an individual may be concerned about financial risk.

Secondly, individuals need to bear a performance risk from the application developers' side, the business partners' side (food catering business and food conveyors), and their ability to perform specific tasks properly to use the service. For instance, the application may not have enough partners to satisfy the users-both on the food catering business partners, and food conveyors. This might be due to their agreements with potential partners (e.g. service fees, payment terms) and minimum capacity to join as partners/employees (e.g. access to the Internet, Internet-connecting devices, knowledge of technology). Moreover, as the competition to gain market share is getting more intense, the better-off partnership terms from other competitors may directly affect the quality of the service. In terms of individuals' ability to perform tasks, users may find it challenging to navigate through the application or locate their delivery destination spot using the in-app map or search function. This might commonly happen to those of higher age (Venkatesh et al., 2012 and 2013)

Lastly, users may perceive physical (health) risks, especially during the pandemic. According to Nardi et al. (2020, as cited in Hong et al., 2021), the perceived risk associated with food consumption is called food safety risk perception. People assess the food safety risk by observing the restaurant's hygiene (restaurants' cleanliness and employees' uniforms), including the sanitary and safety practice. However, this approach is not possible when ordering food via food delivery applications as the food may get contaminated during the delivery process. The challenges are for the platforms to ensure their customers the best quality for hygiene standards to moderate the effect of food safety risk perception that may negatively impact the technology adoption (Hong et al., 2021).

### *3.5 Perceived Severity and Perceived Vulnerability*

Hong et al. (2021) propose two variables: perceived severity and perceived vulnerability, which are derived from the Health Belief Model (HBM) (Hochbaum, 1958) in their research. Perceived severity refers to how serious individuals perceive the pandemic to harm their well-being, and perceived vulnerability refers to the risk for infection that individuals perceive. However, through the empirical research, Hong et al. (2021) found the two variables to have no statistically significant relation to the customer intention to use online food delivery services in the U.S. It is worth exploring if these two variables perform differently in the context of an Asian setting.

## **4. Online Delivery Applications Landscape in Thailand**

### *4.1 Thai People and the Use of the Internet*

The National Statistical Office of Thailand (2021) stated that up to 2020, counting only the population aging from 6 years old, approximately 50 million Thai citizens use the Internet regularly (77.8% of the country's population). This number has overgrown from around 29.8 million in just four years (47.5% in 2016). The statistics also show that 99.2% of internet users access the Internet via smartphones, while computer users have slightly been decreasing year by year. People claim to use smartphones and the internet as a communication and online shopping medium, including both digital natives and digital immigrants.

Moreover, as more technologies are developed and introduced, more new lifestyles and trends emerge. One of the recent trends is called the "Lazy Economy." Daxue Consulting (2021) defines the "Lazy Economy" as an economic phenomenon in that consumption is convenience-based and suggests three variables that result in the phenomenon in China. The three are (1) people live a faster-paced lifestyle (busier), (2) technology is getting more advanced, and (3) personal disposable income is increasing. Consequently, people value their time and convenience more than before. Thus, they hope to find ways to get tasks done as fast as possible without putting in too much effort. In other words, individuals became more willing to pay for convenience. But it does not infer that the lazy economy always leads to a luxurious



lifestyle, as people can save more money thanks to the advancement of technologies (The Siam Commercial Bank, n.d.). The trend plays a significant role in accelerating innovations' launch speed and norms' technology adoption. E-commerce platforms, mobile banking, and online food delivery services are examples of the trend's outcome.

#### 4.2 Online Shopping and Online Food Delivery

In the context of online shopping, buyers are variety-seeking oriented (Donthu & Garcia, 1999). The online platforms provide them with a massive range of choices compared with the offline platform, where they need to spend more effort to browse the same number of shops or items. Individuals may gain more utility from shopping online as they do not have to visit the physical stores themselves (place utility). They can shop or pre-order out of business hours. They can make checkouts without having to queue up in a line (time utility)(Rohm & Swaminathan, 2004, as cited in Chiu et al., 2014). In the same fashion, online food delivery services also provide users with the benefits mentioned earlier. Therefore, time-saving might act as a determinant factor directly or indirectly in adopting such services.

There are mainly two types of online food delivery service providers in Thailand. The first type consists of the food catering business (restaurants) themselves that provide the delivery services. Customers can order via a phone call, the businesses' website, or mobile application. The leaders of this type are big brands such as The Pizza Company, Pizza Hut, KFC, McDonald's, Yayoi, and Laem Charoen Seafood. Some local businesses also provide such services, but not as typical as bigger brands and chain restaurants. Intermediary firms provide the second type of food delivery service. The most common form nowadays is through mobile applications. The advantage of the latter kind is that customers can enjoy more alternatives when shopping for food, allowing them to experience new restaurants and compare offers easily. In the meantime, businesses can also save costs on developing their platforms (or call-centers) and on marketing campaigns to acquire more users.

#### 4.3 Food Delivery Applications

Food Delivery Application (FDA), developed from online shopping technology, aims to connect catering businesses and consumers by providing order and payment platforms and logistics mainly by registered motorbike riders. This online to offline (O2O) service process starts with customers putting an order online; then, the catering business provides food accordingly before handing it to delivery staff (so-called 'riders'). Muangmee et al. (2021) suggest that FDAs are gaining popularity due to the changes in consumer behaviors. For example, many younger consumers prefer the convenience of eating at home and not waiting in lines for food. Furthermore, the FDAs are also forms of contactless food delivery for consumers, providing self-isolation solutions, especially during the COVID-19 pandemic.

Kasikorn Research Center (2021) claims that Thailand's food delivery market value has grown 46.4% from 2020 to 2021 (year on year). The growth was due to (1) the outbreak of the new-variant virus (B.1.1.529, commonly known as "Omicron variant"), (2) the government's regulation of food catering businesses, (3) Work-from-Home policies, (4) the familiarity of ordering food online, and (5) the government's subsidy/co-payment scheme (Khon La Khrueng - literally translated as "Let's Go Halves"). The research team also expects to see a continual increase, though with a slower-paced, in the market value due to the expansion of the service areas (from big cities to provincial areas), more competition, and escalating consumer demand. The average basket price is foreseen to rise from 190 THB to 193 THB in 2022, and the total market value is forecasted to hit 7.9 billion THB by the end of the year.

As of February 2022, the leading players in Thailand's FDAs market include Grab Food, Line Man, Food Panda, Robinhood, Gojek, and ShopeeFood. After acquiring UberEats in 2018, Grab Food has been leading with almost half of the market share (47%). The two runner-ups are Food Panda and Line Man, both at 22% each, leaving only 9% to other players (Valliappan, 2022, Cordon, 2022). Shopee, the leading e-commerce platform, among several pre-existing players, introduced its food delivery service as an extension of its application in the latter half of 2021 (Cordon, 2021). This move can pose a threat to the existing dominant players in the FDAs' market, as Shopee owns approximately half of the market share in the e-commerce market, meaning it has access to resourceful Thailand's consumer insights even before entering the new market.



According to Nikkei Asia (2021b), even though the food delivery market is promising, no one has yet enjoyed the profit. One of the causes is because the businesses earn from the thinner commission fees as the government request a reduction in the percentage taken to aid the population during the pandemic. Moreover, regardless of the cutbacks in commission fees, food conveyors (so-called “riders”) often strike for higher pay, better working conditions, and welfare benefits (Hicks, 2020, Leesa-nguansuk, 2021, and The Nation, 2021). Otherwise, riders, as a vital piece of the FDA business, would switch to work for the competitors. At the same time, consumers might not be loyal to any particular service providers. This is because food falls into the low-involvement product category. Customers tend not to remember the price from the previous transactions. Therefore, customers may make decisions based on the most rational option being offered at that moment (Monroe and Lee, 1999, as cited in Yeo, Goh, and Rezaei, 2017), resulting in food delivery service providers having to give out promotions all year long to attract or retain their customers. Also, as each company has similar concepts with different interfaces, each application can be considered a substitute. This is to say, consumers’ switching cost is not high, and they are ready to change to other competitors if the brands fail to deliver the values expected. For example, Food Panda was boycotted by pro-democracy protesters (customers, food catering businesses, and riders) after the brand called one of the pro-democracy protesters “terrorist.” Consequently, Food Panda was forced to suspend its advertisements on all the channels due to the fear of its partners’ brand reputation (Nikkei Asia, 2021a).

## 5. Conclusion

Technology advancements are developed to guarantee a better quality of human life. In this academic article, I investigate the situation of Thailand’s food delivery applications market through the lens of technology adoption processes and consumer behaviors. After exploring previous literature on technology adoption models, I find the lack of models that can adequately explain the situation of “food delivery applications,” especially during the COVID-19 pandemic. As the statistics show the escalating market value rate, it remains unclear whether consumers adopted the technology voluntarily or involuntarily (due to the pandemic and government regulations). Also, with the length of the pandemic situation, if individuals adopt the technology involuntarily, will the variable become irrelevant after some point in time?

It is also worth noting that the service price is becoming cheaper over time due to more intense competition and the government’s regulations. As a result, individuals may have a lower barrier in trying and adopting the technology, while they also have a lower cost of switching. At the point of this article, no player in the market has yet reaped the profits, as they are attempting to gain as many consumers and business partners (food catering businesses and riders). However, since food is considered a low-involvement goods category, food delivery applications, acting as intermediaries, might suffer from the cost of acquisition of new customers, not to mention loyal customers to the brand. The service providers need absolute advantages or campaigns that can create strong-and-healthy loyal customer relationships instead of competing with price-cut.

It is also questionable whether the market will continue to be promising even after the pandemic or not. This idea is based on the trend in tourism, “revenge travel,” as more people may drop off the online service and go experience the restaurants in person more after the long-lasting pandemic.

This study also recommends that the food delivery service providers emphasize understanding current customers’ insights and then try to focus on converting those customers into their loyal customer base. At the same time, I recommend that the user experience and application developers teams ensure the best experience when users open the applications. This will lower the barrier of adoption, as well as becoming regular/loyal customers.

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