THE STUDY OF USER AND NON-USER OF THE ONLINE FOOD ORDERING SERVICE IN THAILAND

BY

MISS VARUNTHIP TOWANASUTR

AN INDEPENDENT STUDY SUBMITTED IN PARTIAL
FULFILLMENT OF
THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF SCIENCE PROGRAM IN MARKETING
(INTERNATIONAL PROGRAM)
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THAMMASAT UNIVERSITY
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ENTITLED

THE STUDY OF USER AND NON-USER OF THE ONLINE FOOD ORDERING SERVICE IN THAILAND

was approved as partial fulfillment of the requirements for
the degree of Master of Science Program in Marketing (International Program)

on............6 JUN 2016..........

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ABSTRACT

The purpose of this report was to study the user and non-user groups of online food ordering services in Thailand. This included examining the user demographic, geographic, psychographic and usage profile; then, understanding the consumer behavior. This meant to identify the user segment by means of their perceived benefits of the service and ability to point out the segments that are the most attractive in term of value. For the non-user group, the researcher wanted to understand their behavior and get insights into the barrier against online food ordering adoption. Exploratory research was first conducted through secondary data of online articles, online reports and past research. The objective was to gain understanding into the current market place and the current consumer behavior and trend. In-depth interviews were conducted with twelve interviewees of both the users and non-users category in the same proportion. The interviews were conducted with 25-40 year olds (Millenniums generation) as this was the hypothesized target consumer. Descriptive research was conducted after the completion of exploratory research through a questionnaire distributed online. The number of surveys completed by the respondents was 136 surveys; 101 were the users and 35 were the non-user group. The data were then analyzed using Statistical Package for the Social Science (SPSS.) The analysis included frequency analysis, cross tabulation and Chi-Square test, ANOVA test, factor and cluster analysis. The findings showed that the user and non-user groups gave different importance levels to the benefit of online food ordering services. The user group gave the most value to convenience as their reason for using the service, while the non-user group did not see the need for this type of service. The lifestyle of the two groups was also significantly different in the category of ‘enjoy cooking’.

Keywords: Food-Service, Delivery Service, Online Purchase

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Miss Varunthip Towanasutr

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INTRODUCTION

1.1 Overview

Thailand shows a lag in adapting and growing its online food delivery service when compared with the developed nations. Online purchase became possible after the development of secured online payment systems and grew with the help of a growing trend of consumer lifestyles that became more time poor. As a result, in recent years, the trend of purchasing online has been picking up especially with clothes, gadgets, food and beverages. The scope of this study was focused on the food industry only. The research divided the subject group into the users and non-users groups with the concentration being on the former. The study's findings allow readers to understand the profile of the users and non-users for this type of service. The findings on consumer insights will depict the user's trigger to purchase and the non-users' barriers to adopt this service. According to perception and attitude factors, users have been classified into three distinct groups: (i) convenience seekers, (ii) variety seekers and (iii) tasty and quick meal seekers. The findings will help new vendors to understand this industry in terms of consumer behavior and know the most attractive customer segment to focus on.

This report falls into the study of contemporary topics in applied marketing under a society issue theme. The main objective is to study the users and non-users of the online food ordering service in Thailand.

1.2 Research Objectives

1.2.1 To know the users of online food ordering service.

- To identify the demographic profile. For example: age, occupation, education level and income.
- To identify the geographic area of the user. For example: residential area and workplace location.

- To identify the usage behavior on online food delivery service of the user. For example: occasion of use, purchase channel, usage rate.
- To identify the trigger to order online food delivery service. For example, attractiveness of actual product, price and discount.
- To identify the attitude and perception that user has toward online food ordering service.
- To determine the lifestyle of the user.
- To know the media consumption of the users.

1.2.2 To identify the users segments in the online food ordering services.

- To know what customer needs are in each segment.
- To identify the most valuable segment(s) (volume and value.)

1.2.3 To know the non-users of online food ordering service.

- To identify the demographic profile. For example: age, type of residential, occupation, education level and income.
- To identify the geographic area of the non-user. For example: residential area and workplace location.
- To determine the alternative choices of online food ordering service for non-user.
- To identify the media consumption behavior of the non-user.
- To identify the barriers to purchase.
- To determine the lifestyle of the non-user.
- To identify the attitude and perception that non-users have toward online food ordering service.

CHAPTER 2
REVIEW OF LITERATURE

2.1 Thailand shift to urbanization and effect

The impact of urbanization on Thai people and their lifestyle has led to time constraints including their inability to cook and prepare food as they did in the olden days (Euromonitor International, 2015.) Thai people devote their time to work, socializing, exercising and relaxing. Inevitably, as well, Thai citizens often have to spend a whole lot of time on the road especially during rush hour in the major metropolitan areas. Among the Thai people, young, middle-aged consumers residing in big cities especially Bangkok are the key group in driving sales for the food service in Thailand (Euromonitor International, 2015.) This group of people like to indulge themselves by visiting new restaurants where fine food is served as well as where there are great ambiences; thus, a consumer's value also consists of other factors besides food. Similarly this can be seen in the United States market also as Denning (2014) pointed out that the contributor to the emergence of ordering food online comes primarily from the millennial generation. Another on-going trend, according to Euromonitor International (2015), is a concern or importance with health and wellness, among female consumers. This health and wellness factor has a big impact on the overall market reaction that has led to existing players creating products suitable for this market segment. Nevertheless, both groups of consumers seek quick and convenient meals given their active lifestyles.

2.2 The role of digitization towards food industry in Thailand

According to Euromonitor International (2015), the Internet has rapidly become more important to Thai consumer's lives especially as more and more people take hold and connect via their smartphones, laptops and other devices. With better information accessibility, a consumer's purchase decision is influenced more or less by the available content online. As a consequence, food service operators turn to online tools (Instagram, YouTube, Facebook, Twitter) to create their brand awareness, carry out promotion and other marketing activities. Moreover, these operators have been trying to goad consumers to try ordering food online such as through their websites, via phone or by mobile application. From the findings reported using questionnaire research conducted by the Electronic Transaction Development Agency (ETDA) and the Ministry of Information and Communication Technology (ICT), purchases of products and services and selling of products and services through mobile devices in Year 2015 amount to 25.8 percent and 9.9 percent respectively. For purchase of products and services and selling of products and services via computer in Year 2015 the figure is 23.6 percent and 8.4 percent respectively (Appendix A). Although trading of products/services is not the main activity over the Internet, but it still shows a promising proportion of users who engage in this type of activity. In addition, the purchase and selling of products and services online via computers is mostly popular among third genders (gay, lesbian, etc.) and males who are in the generation X and Y. On the other hand, the purchase and selling of products and services online via mobile devices are mostly popular among third gender and females who are in the generation X and Y. To draw the conclusion, third genders engage the most with trading online and generation X and Y are the main contributors to the success of e-commerce (Appendix B).

2.3 Home Delivery service provider and marketplace

In 2015, Euromonitor International (2015) expects the demand for food delivery services to maintain a compound annual growth rate (CAGR) of 3 percent. As of 2014, the market for 100% home delivery/take away was worth Baht 23.7 Billion. The market is dominated by 3,428 independent operators (92 percent) and the remaining 8 percent are the 287 chained operators (Appendix C). The chained operator proportion is dominated by Minor International PCL, the large chained operators in pizza (The Pizza Company) and next in line is Yum Restaurant International Thailand Co., Ltd (KFC, Pizza Hut.) Both of these big chain players' key success factors lie with the rapid opening of new outlets and consistent introduction of new menus. The sales in terms of value as of 2014 are Baht 6.8 billion and Baht 16.9 billion for chained and independent 100% home delivery/takeaway respectively (Appendix D).

According to Sethithorn (2015), home delivery operators were started off by those who were already engaged in the food industry and would like to extend their product offer to a new set of target consumer. The new set of consumers are the ones who seek convenience as well as those who wish to try new products but live in a distant area. Coupled with the development of telecommunications and infrastructure in Thailand has been the enablement of the social media to influence the consumer in buying decisions and allow service operators to do nation-wide delivery.

Another type of business model that surfaced by leveraging the trend of home delivery of food are the so called "online food-delivery marketplace." This business model compiles food service operators in one place and acts as the middleman to assist the consumer to complete the transaction and deliver the goods. As Pornwasin's (2014) interview with Mr. Alexander Felde, the managing director of the biggest player in the Thai market, Foodpanda, the business is performing exceptionally well with growth of 10-15 per cent on a weekly basis (2014.) Moreover, Foodpanda has over 650 food operators as of 2015 on its listed menu and has already expanded its service to three cities in Thailand (Bangkok, Chiangmai, and Pattaya.) However, the service is still limited to the city center only of each city. Mr. Felde said as of 2014, their sales channel is 50 percent from mobile applications, 45 percent from computers and only 5 percent of orders are made by phone. This signifies the urban target consumer willingness and readiness to shift to online service for food.

Euromonitor International (2015) expects two possible hindrances to growth for the 100% home delivery/takeaway operators in Thailand. The first one being the likelihood that competitors in other food categories (fast-food, full-service restaurants/café/bars) will emerge given the attractiveness of the market, the need to strive in circumstances of economic slow-down, and also the increasing sophistication of consumer demands.

Secondly, the increase in drive-thru service operators can also steal consumers given that it offers the same benefit of convenience.

2.4 Food provider facing challenges from growing consumer needs

On a global scale, when it comes to food, the consumers' needs are evolving into a much more complex matter. A research paper titled "The Global Impact of the rise of the: can't cook gourmet" from Euromonitor International (2016) pointed to two key factors that are changing the way consumers eat. The first being the higher expectation consumers have of food: be of good taste, be exciting, be high quality and be healthy. The second being the diminishing cooking skills among consumers, given the busy lifestyle, making people turn to easy meal solutions. These combinations have then created consumers who want the best quality food, but with no time to cook and also likely with no skill to do so. The bottom line is that the future is that service providers can no longer offer only convenience benefits, but convenience needs to incorporate speed, quality and excitement into the product and services.

CHAPTER 3
RESEARCH METHODOLOGY

3.1 Exploratory Research

3.1.1 Secondary Data

The secondary data were the information regarding the state of the industry, the current service providers in the market, trends and market outlook. The method of collection was through online articles, online reports, online journals, reports from the Ministry of Information and Communication Technology, reports from the National Food Institute, the Ministry of Industry and Euro Monitor research.

3.1.2 In-Depth interview

Interviews were conducted for the purpose of finding insights and exploring consumer perception and attitudes towards online food ordering services. Among many valuable insights were the media consumption and persuasive promotion, all of which were used to construct the questionnaire. The interviews were conducted with six users and six non-users. The sampling method employed was the convenience sampling while the collection method was either face-to-face meetings or telephone interviews. The criteria for selecting the interviewees were those aged between 25 and 40 years (Millennium generation.) The interviews were conducted by myself and included closed-ended questions, open-ended questions, checking questions and probing questions.

3.2 Descriptive Research

Descriptive research through a questionnaire survey was used to identify the users and non-users of online food ordering services (Appendix E). Each group was then tested against attitude, perception, behavior and demographic information were obtained. The sampling method used was convenience sampling by using the collection method of online distribution of the survey through the Internet channel. The respondents were initially found through personal connections then the snowball technique to the referral network. This also included posting on the social media channel of Facebook to disperse the survey collection further. In total, the questionnaire survey was answered by 136 respondents: 101 users, and 35 non-users. The researcher could not collect a sample in the ratio of half users and half non-users due to time constraints and difficulty in finding non-users. The findings resulted from the secondary research and in-depth interviews were used to construct the questionnaire survey, which consisted of five parts as follows:

3.2.1 Screening Questions

The screening question asked respondents whether they have had any experiences in using an online food ordering service in order to separate the user and non-user groups to a different set of survey questions.

3.2.2 Actual behavioral of consumer

The users of the service were given a set of questions on when, where, why and how the respondents used the service. This section comprised of nine questions, which included nominal, ordinal and interval question types with both single and multiple answers available.

The non-users of the service were given a set of questions with the objective of finding out their alternative action instead of ordering food through the online channel. This was done through likert scale question types with a score of 1 to 7 to match respondents' actions when having to find food through the introduction of different scenarios. In addition, the non-user respondents were tested for their awareness of the service providers of online food ordering.

3.2.3 Checking consumer perception and attitude

One set of questions, containing eight benefits of an online food ordering service, was asked to the user group against the likert scale with an objective of testing their perceptions. Another set of questions with seven assorted promotions was presented in likert scale with an objective of revealing the attractive promotion tools for the user group. The employment of interval scale measurement made the respondents form their opinions on each agreement level from 7=most agree to 1=least agree. Furthermore, this is the most important indicator to form factor and cluster analysis.

For the non-user respondents, they were given the same set of questions for this part as those of the users. However, an additional set of question was asked with an objective of cross checking their attitude toward the online food ordering service. A set of questions with ten negative meanings were shown to the respondents and in return, they were asked to form an opinion through 7-point likert scale.

3.2.4 Lifestyles and values of each group

Both user and non-user respondents were given the same set of questions for this part. The objective of part 4 was to determine if the two groups differ in their lifestyles. This was asked using a nominal type of question with multiple answers accepted.

3.2.5 Demographic Profile

This part is aimed to collect respondents' demographic information, which are: gender, age, education, work location, residential location, income, occupation and nationality. The types of question used were nominal and interval.

3.3 Data Analysis

This study consisted of 136 sets of fully completed survey questionnaires: users responded to 101 and non-users responded to 35. The analysis was conducted through the SPSS statistical software package to address the research's objectives. The analysis methods employed were: frequency analysis, cross tabulation and Chi-Square test, ANOVA test, factor and cluster analysis.

CHAPTER 4
RESULTS AND DISCUSSION

4.1 Key Findings from Exploratory Research

4.1.1 Secondary Data

Time has become a scare resource for the urbanized population. With the growing demand on work-life balance and health and wellness trend, this has resulted in the development of many products and services to capture the active lifestyle population. In addition, the growth of online commerce and Internet retailing in recent years has become a key stepping stone for the emergence of the online food ordering service. Within the user group of this type of service are different needs. A group of users may not be concerned with the taste of the food as much as the convenience that the service gives them and so fast food delivery service will be their top choice. On the other hand, another group also values convenience, but at the same time adheres to consuming high quality food. The different needs among consumers created vast opportunities for the service provider. As such, leading chain operators in Thailand and small local stand-alone restaurants or other independent operators have their own positioning in this marketplace.

4.1.2 In-depth interview

The consumer insight obtained from the user group showed the main reason for choosing an online food ordering service is for the convenience factor. This group of people tended to look for variety in food given that in many occasion they were with their friends and families who had different menu preferences. Moreover, they requested to know the guaranteed estimated delivery time. The majority of the interviewees had ordered pizza through online delivery services in the past. The awareness of the online food-delivery marketplace such as Foodpanda, Food By Phone, and Passion Delivery were only known to a portion of the interviewees. The main dislikes for the user group toward this type of service was the occasional long waiting time and the food being cold when it arrived.

The non-users' group awareness of the mainstream delivery service from fast food providers was known; but unaware of another online food-delivery marketplace. They seem uninterested in this type of service as they felt they could always find food around them and that this type of service was not in their consideration set when having to purchase food. However, after the probing questions of the benefits and the offerings available in the market concerning this service, some respondents appeared interested but lacked awareness in the ordering process, delivery coverage and concern was raised over the delivery fee.

4.2 Key Findings from Descriptive Research

4.2.1 Demographic of all respondents

Among all respondents, 58.1 percent were female and 41.2 percent were male, the remaining 1 percent was the third gender. Although the term "third gender" had been used throughout the published research paper by government agencies in Thailand, the result of the survey showed that the respondents perceive themselves as the gender at birth upon doing the survey. The majority of the respondents fell in the age range 26-30 and 31-35 with 53.7 percent and 21.3 percent respectively; totaling to almost 75 percent. While the education background of the respondents who held bachelor degrees comprised of 29.4 percent and graduate degree holders comprised 69.9 percent. The occupation of the respondents fell mostly in the self-employed and corporate employee category making up 75 percent of the sample. On the other hand, the monthly personal income was dispersed among the respondents. (Appendix F)

4.3 The users of online food ordering services

Figure 4.1: Classify respondent into user and non-user group (n= 136)

	N	%
User	101	74.3%
Non-User	35	25.7%

This research divided respondents into 2 groups: users and non-users of online food ordering services.

4.3.1 Demographic Profile

The user group was approximately 60 percent female and 40 percent male. The majority of the users' age fell between 26 and 35 years old covering almost 80 percent of the sampled population. Users with bachelor degrees consisted of around 26 percent while those with graduate degrees consisted of around 73 percent. The occupations of the user group are either self-employed or corporate employees with 21.8 percent and 52.5 percent respectively. While the monthly income range aggregated between Baht 20,000 Baht 80,000; moreover, 14.9 percent of users have income greater than Baht 120,000. (Appendix G)

4.3.2 Geographic Profile

From the secondary research conducted into commercial buildings and the most condensed areas shown on the survey: Sukhumvit (1-71), Silom, Sathorn, Rama 4, Rama 9 and Phahonyothin. The result of the survey pointed to a new area, Viphavadee, in which many respondents mentioned the "Other" category. The result showed approximately 70 percent of the respondents are working in these areas or what will now be referred to as the central business district (CBD).

When it came to the residential area, the top three areas from the respondents were Sukhumvit (1-71), Phahonyothin and Thonburi in the respective order. Initially the answer choices in the survey for both the working area and residential area questions were the exact same. However, after the researcher saw the high frequency in some area

uncovered by the answer choices, the list of areas was revised accordingly. As for the residential area, Thonburi and Lad Prao were the additional areas.
(Appendix H)

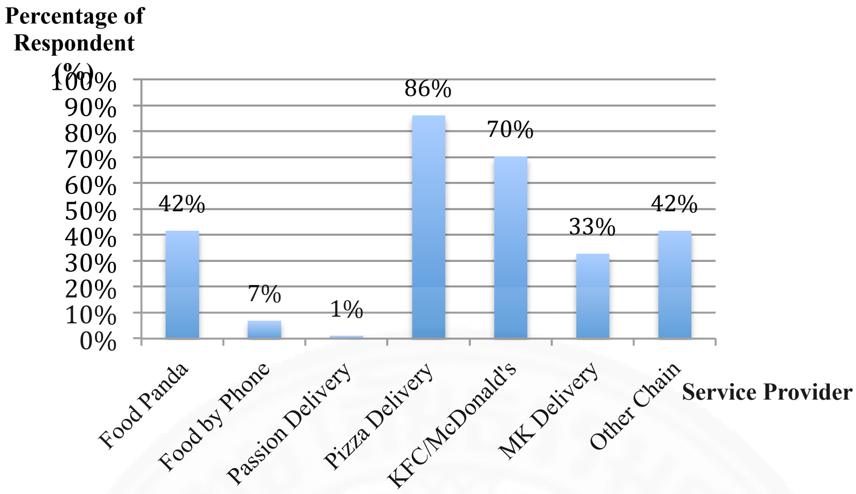
4.3.3 Usage Behavior

Figure 4.2: The occasions that users choose an online food ordering service

Occasion	N	%
Lazy to cook/go out	65	64.4%
Traffic jam	51	50.5%
Busy at work	45	44.6%
Gathering at home	38	37.6%
Specific craving	32	31.7%
Late night meal	26	25.7%
Need easy, quick meal	26	25.7%

From the in-depth interview, the finding was that most users had more than one reason to adopt this type of service; thus, the questionnaire allowed respondents multiple answers to this section. The top three reasons why users choose an online food ordering service were: (i) they feel lazy to cook or to dine out, (ii) they avoid going out during traffic congestion, (iii) too busy at work to go outside. The user group ordered food through online channels mostly 1-5 times a year showing 42.6 percent, 6-10 times a year at 32.7 percent, 11-15 times at 12.9 percent and the remainder ordered over 16 times a year. 68 percent of the users were at home when they used this type of service, another 32 percent were equally distributed between friend's home and office.

Figure 4.3: Users experienced service provider



The online channels that users had experienced were a variety covering well-known online food platforms that act as mediators between consumer and none-fast food restaurants (Foodpanda and Food By Phone), niche-target platform for purchase of raw-ingredients (Passion Delivery), and mass-target fast food chain restaurant service (KFC, McDonald's, Pizza Company.) In accordance with the in-depth interview the results displayed that 86 percent of the user group had purchased pizza and another 70 percent had purchase KFC/McDonald's through online ordering services.

Figure 4.4: Cross-tab analysis of service used by respondents

		Service Used						
		Food Panda	**Food By Phone**	**Passion Delivery**	**Pizza Delivery**	**KFC/ McDonald**	**MK**	**Other Chain**
		%	%	%	%	%	%	%
Service Used	Food Panda	100.0	85.7	0.0	41.4	42.3	39.4	31.0
	Food By Phone	14.3	100.0	0.0	8.0	9.9	9.1	4.8
	Passion Delivery	0.0	0.0	100.0	1.1	1.4	3.0	2.4

	Pizza Delivery	**85.7**	**100.0**	**100.0**	**100.0**	**90.1**	**90.9**	**85.7**
	KFC McDonald	71.4	100.0	100.0	73.6	100.0	84.8	54.8
	MK Delivery	31.0	42.9	100.0	34.5	39.4	100.0	42.9
	Other Chain Delivery	31.0	28.6	100.0	41.4	32.4	54.5	100.0

The users who had used the service from Food Panda, Food By Phone, Passion Delivery, KFC/ McDonald's, MK Delivery and other chain delivers had also used a pizza delivery service with a prominent percentage of 85.7%, 100%, 100%, 90.1%, 90.9% and 85.7% respectively.

The top five types of food that users tended to order by ranking are: fast food (88 respondents), Japanese food (34 respondents), Italian food (29 respondents), Thai food (23 respondents) and American food (16 respondents.)

Figure 4.5: Purchase channel and type of food ordered

		Service Provider that users had experienced						
		Food Panda (%)	**Food By Phone (%)**	**Passion Delivery (%)**	**Pizza Delivery (%)**	**KFC/ McDonald (%)**	**MK Delivery (%)**	**Other Chain (%)**
Type of Food Ordered	**Raw-ingredient**	2.4	0.0	100.0	9.2	8.5	9.1	14.3
	Thai Food	28.6	**42.9**	0.0	19.5	18.3	**39.4**	**31.0**
	Chinese Food	7.1	0.0	0.0	6.9	7.0	12.1	14.3
	Japanese Food	**42.9**	**42.9**	100.0	33.3	33.8	36.4	**42.9**
	American Food	**21.4**	**28.6**	0.0	17.2	18.3	21.2	19.0
	Italian Food	**45.2**	28.6	100.0	31.0	32.4	36.4	21.4
	Fast Food	**88.1**	**85.7**	100.0	**88.5**	**91.5**	**84.8**	**88.1**
	Other	11.9	28.6	0.0	9.2	7.0	12.1	9.5

This table presents the crosstab analysis of what are the overlaps in the services users had experience with and the types of food they were inclined to order. Users who ordered Thai food are also the users of Food by Phone, MK Delivery and other chain restaurants. 42.9 percent of those who ordered Japanese food are also users of Food Panda, Food by Phone and other chain delivers in an equal proportion. Those who went for American food are mostly users who had experience with Food Panda and Food by Phone. The users who ordered Italian food are mostly users of Food Panda that accounted for 45.2 percent. The majority of the users who had ordered fast food had experience using almost all of the given service channels.

Thai food was mostly ordered by users with income ranges: Baht 40,001-60,000 and greater than Baht 120,000. 50 percent of Chinese food ordered by the total sampled population was by those with income greater than Baht 120,000. Almost 60 percent of Japanese food was ordered by those with income range Baht 20,000-Baht 60,000. Those with income of Baht 40,0001-60,000 accounted for almost 63 percent of the American food orders. While Italian food orders was very dispersed across all types of income range. Fast food, on the other hand, was common with income range Baht 20,000- Baht 60,000. (Appendix I)

4.3.4 Psychographic Profile

4.3.4.1 Perception

To test the most crucial key benefits that users perceived in choosing an online food ordering service the test uses the likert scale question type where 7 indicated strongly agree and 1 indicated strongly disagree. The result demonstrated that users saw this service as being convenient (M = 6.14, SD = 1.45), easy to order (M = 5.36, SD = 1.26) and trust in safety of the payment system (M = 5.18, SD = 1.42). (Appendix M)

4.3.4.2 Life style

Figure 4.6: The user group lifestyle

Life Style of Respondents	%
Exercise Lifestyle	30

Enjoy cooking	25
Enjoy going out	62
Enjoy being home	73
Enjoy hanging out at home with friends	13
Enjoy working	15

73 percent of the user groups enjoyed relaxing at home, while another 62 percent said they enjoyed going out to activities such as meeting up with friends, going to see a movie and going shopping.

4.3.4.3 Media Consumption

The user groups are heavy consumers of social media with 82.2 percent stating that they seek their updates on food through this channel. Other channels they received information from are from talking to friends and family, and through websites with 57.7 percent and 50.5 percent respectively.

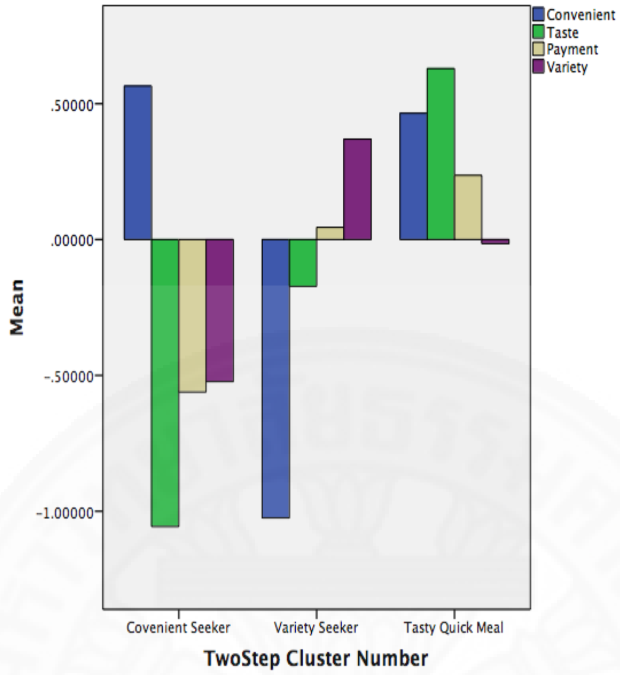
4.4 Identify user segments

In order to know the segmentation of users, the consumer insight obtained from in-depth interviews were analyzed and formed the seven perceived benefits of the online food ordering service. This was then tested against the population sampled through questionnaire before employing the factor grouping, and cluster analysis technique.

Through likert scale questions, the user respondents shared their scores toward the perceived benefits of online food ordering services. Then, the researcher performed data extraction using the rotation method of Varimax with Kaiser Normalization, the perceived benefits obtained were then factorized into four areas (Appendix J):

1. Fast delivery + Convenient + Easy process = “Convenient”
2. Good taste + Indifferent to restaurant experience = “Taste”
3. Safe payment = “Payment”
4. Variety in food = “Variety”

Figure 4.7: Cluster Analysis to determine segmentation among users



After conducting cluster analysis in the SPSS, three segments were identified: (i) Convenient Seeker, (ii) Variety Seeker, and (iii) Tasty quick meal Seeker

4.4.1 Demographic

Figure 4.8: Demographic profile by segment

	Convenient Seeker	**Variety Seeker**	**Tasty Quick Meal Seeker**
Gender	Female (54.5%) Male (45.5%)	Female (54.5%) Male (42.4%)	Female (65.2%) Male (34.8%)
Age	26-35	21-40	26-45
Education	Bachelor's Degree and Graduate Degree	Bachelor's Degree and Graduate Degree	Bachelor's Degree and Graduate Degree

4.4.2 Geographic

After conducting a one-way between-groups analysis of variance (ANOVA test), there was no significant statistical difference between each segment and the work place and residential place.

4.4.3 Usage Behavior

The order frequency for the Convenient Seekers and the Variety Seekers were similar with approximately 80 percent of the respondents who ordered food through online 1-10 times each year and those who order greater than 11 times a year accounted for around 20 percent. However, the Tasty Quick Meal respondents who ordered greater than 11 times a year accounted for 30 percent. As for the payment method used, all segments show the same trend of paying in cash upon delivery followed by online payment. Another question was added to test if users would prefer other payment method if available and the result shows that approximately half of the respondents preferred to pay by credit card as opposed to cash on delivery. This indicated that users of online services have become more accustomed to online payment and the insecurity of sharing credit card information online is no longer their concern. This can be observed from the Tasty Quick Meal seeker group, 74% of who currently paid cash on delivery but 57% would turn to online payment if available.

4.4.4 Psychographic Profile

4.4.4.1 Life Style

The Convenient Seeker group saw themselves engaging in a wide range of activities and they may be seen as the group who attempted to live their life to the fullest and seek a work-life balance lifestyle. While the variety seeker tended to enjoy being at home and home as a place for their own relaxation. They also enjoyed going out but not as much as the other two segments. The Tasty Quick Meal Seeker was the most active group when it came to exercise, and they enjoy being at home the most also. (Appendix K)

4.4.4.2 Needs

(1) Touch points

Among all three segments, there was no significant difference in the way users gave importance to the following factors when ordering food online: appearance of the ordering touch point, the user friendliness of the touch point, payment options, past users reviews, statement of delivery time, variety of food available and price. All segments perceived the most crucial factors when ordering food online to be: variety of food available, clearly stated delivery time, user-friendliness of ordering touch point with mean of 2.9010, 3.1980 and 3.4356 respectively. This question asked respondents to rank 1 to 7 where 1 is the most important factor while 7 is the least important factor. (Appendix L)

(2) Promotion

The user group was tested against the attractiveness of each promotion type through a likert scale test with 7 being strongly agree and 1 being strongly disagree. Then, a one-way between-groups analysis of variance was conducted to explore the relationship between each cluster and their reaction toward each type of promotion. There was a statistically significant difference at $p<0.05$ for the discount promotion with p-value = 0.018. Post-hoc comparisons using the Tukey HSD test showed that the mean score for Tasty Quick Meal Seekers (M = 5.4783, SD = 1.1877) was significantly different from the Variety Seekers (M = 4.6061, SD = 1.7489.)

(3) Segment by value

Figure 4.9: Average spending by segments

Average spending for User (Baht)	Two-Step Cluster Analysis					
	Convenient Seeker		Variety Seeker		Tasty Quick Meal Seeker	
	N	%	N	%	N	%
< 100	0	0.0%	0	0.0%	0	0.0%
100 - 200	3	13.6%	4	12.1%	12	26.1%
201 - 300	10	45.5%	12	36.4%	14	30.4%
301 - 400	5	22.7%	10	30.3%	7	15.2%
401 - 500	1	4.5%	3	9.1%	2	4.3%
> 500	3	13.6%	4	12.1%	11	23.9%
Total	22	100.0%	33	100.0%	46	100.0%
Segment Value*	**฿6,950**		**฿10,850**		**฿15,250**	

* Calculated from average spending for respondent (user group) x number of user in the segment

Figure 4.10: Order frequency by segment

Order Frequency	Convenient Seeker	Variety Seeker	Tasty Quick Meal	Total
	%	%	%	
1-5	23.3	32.6	**44.2**	100
6-10	24.2	36.4	**39.4**	100
11-15	15.4	15.4	**69.2**	100
16-20	0	50	**50**	100
>20	20	40	**40**	100

From the sampled population, the Tasty Quick Meal Seeker segment had the most respondents (n = 46), had the highest spending on online food ordering service, and ordered the most frequently. They are the most valuable segment for the service provider.

4.5 The non-users of online food ordering services

4.5.1 Demographic Profile

- Gender: Female (54.3%), Male (45.7%)
- Age: 26-30 (54.3%), 31-35 (11.4%), 41-45 (17.1%)
- Education: Bachelor degree (40%), Master degree (60%)
- Monthly Income: Baht 20,000 – Baht 40,000 (17.1%), Baht 40,0001 – Baht 60,000 (34.3%), Baht 60,0001 – Baht 80,000 (17.1%)
- Occupation: Self-employed (22.9%), Corporate employee (54.3%), Government officer (11.4%)

4.5.2. Geographic Profile

The Pearson Chi-Square test showed no significant differences between the geographical area: work and home between the user and non-users group.
(Appendix M)

4.5.3 Consumer Behavior

4.5.3.1 Awareness

This question had allowed for multiple answers. 54.3 percent of the non-user respondents had awareness of the Food Panda platform while 82.9% and 88.6% knew about pizza delivery service and KFC/McDonald's delivery services. Merely 5.7 percent are aware of Food by Phone and none of the respondents had ever heard of Passion Delivery. (Appendix N)

4.5.3.2 Different category competitor to food online

Figure 4.11: Non-user alternatives to online food service

Alternative to online food service	Mean	Standard Deviation
Walk/drive out for street food vendor	5.06	1.83
Go to convenient store nearby and grab food. (7/11, Family Mart, etc)	4.83	1.82
Ask someone to buy food and bring to me	4.09	2.16
Search for ingredients in the fridge and cook	3.60	2.08
Heat up frozen food in my freezer	3.57	1.65
Drive to a drive-thru restaurant	2.71	1.87

The non-user group was asked what action do they take when they needed food, they then had to rank their similarity to the alternatives given. This was tested by likert scale question type with score of 1 to 7 to match respondents' action; 7 being the most likely action and 1 being the least likely. The highest three mean scores are: go out to street food vendor, visit convenience store, ask someone to buy for them with a mean of 5.06, 4.83 and 4.09 respectively.

4.5.3.3 Media Consumption

Figure 4.12: Non-user media consumption

Type of Media	N	%
Social Media (Facebook, Instagram, blogs, etc)	23	65.7%
Free Magazine (Guru, BK, EDT, etc)	11	31.4%

Magazine	5	14.3%
Radio	10	28.6%
TV	15	42.9%
Website	17	48.6%
Talking to my friends/family	25	71.4%
I don't search for food information	8	22.9%

The non-user group received the most information on food updates from talking to their family and friends with 71.4% of all non-user respondents. They also got their updates from social media and websites with 65.7 percent and 48.6 percent respectively. Mass media channels, television and radio were also among their sources of information with 42.9 percent and 28.6 percent respectively.

4.5.4 Psychographic Profile

4.5.4.1 Lifestyle

Figure 4.13: Non-user self-perception

Self-Perception	N	%
I regularly exercise	16	45.7%
I like to cook when I have time	15	42.9%
I like to go out with my friends	17	48.6%
I like to just be at home relaxing	22	62.9%
I like to invite friends over to hang out at my place	2	5.7%
I love my job!	7	20.0%

The non-user group stated that they most like to be at home relaxing with 62.9 percent of respondents. Respondents who enjoyed exercise, cooking and going out with friends showed a similar proportion.

4.5.5 Attitude & Perception

Figure 4.14: Non-user perception toward online food ordering service

Benefits of service	Mean	Standard Deviation
It is convenient	5.43	1.20
It offers great varieties in food choices	4.66	1.19
Payment system is safe	4.29	1.30
The delivery time is fast	3.91	1.54
The order process is easy	3.83	1.44
The food quality is indifferent to dining at the	3.71	1.66
The food tastes good	3.69	1.05

Through likert scale type of question with a 1-7 scale where 7 is the strongly agree and 1 is strongly disagree, the non-user group perceived ordering food online had the most benefit in: convenience, variety offered, and safety in payment with means of 5.43, 4.66 and 4.29 respectively.

Figure 4.15: Non-user attitude toward online food ordering service

Disadvantage of the service	Mean	Standard Deviation
I have no moment when I need this service	5.26	1.58
The food is cold when it arrives	4.83	1.84
Unsure if delivery covers my area	4.74	2.05
Taste is bad	4.51	1.72
Delivery fee is expensive	4.40	1.75
The food is not fresh	4.40	1.75
Complicated ordering system	4.11	1.45
Expensive	4.06	1.76

Insecure payment system	3.83	1.85
The quantity received is too little	3.60	1.65

This question was tested through likert scale types of questions with a 1-7 scale where 7 is the strongly agree and 1 is strongly disagree with the objective of unveiling the reason why the non-user group do not turn to an online food ordering service. The highest mean of 5.26 is that non-users did not see themselves as having the need for this type of service. The second highest was the quality factor of the food being cold when arrived with a mean of 4.83. The third highest was the lack of awareness factor as to the delivery area coverage with a mean of 4.74.

4.5.5.1 Promotion

This question asked respondents for a ranking of 1 to 7 where 1 is the most important factor while 7 is the least important factor. Free delivery, discount promotion, buy 1 get 1 free were the top three promotions that were deemed attractive to the non-user group showing mean scores of 5.80, 5.69 and 5.63 respectively. (Appendix O)

4.6 Comparison between users and non-users group

An independent-samples test of the mean (t-test) in the perceived benefits that user and non-user groups had toward an online food ordering service were statistically significant. With equal variance in both groups, there was significant difference at significant level of 0.05 among the two groups in the service benefits of “convenience”, “The food tastes good”, “The delivery time is fast”, “The order process is easy”, and “The payment is safe.” (Appendix P)

Figure 4.16: Comparison of user and non-user perception of service

Two-tailed	Convenience	The Food tastes good	The delivery time is fast	The order process is easy	The payment is safe
t-test	2.606	2.955	4.022	5.944	3.280
df	134	134	134	134	134
p-value	0.010	0.004	0.000	0.000	0.001

The lifestyle of the two groups was statistically different after conducting the Pearson Chi-Square two-sided test with a significance level of 0.10. The user and non-users' differences were shown in the 'enjoy cooking' lifestyle (chi-square = 12.348, df = 5, p-value = 0.055.) The non-users enjoyed cooking when they have time more than those of users.

The Pearson Chi-Square test result showed an association between the user and non-user groups in their type of media consumption (chi-square = 33.95, df = 8, p-value = .000.) The test indicated that the user and non-user groups were significantly different in media consumption of social media, radio, TV and the non-user group do not search for information updates as much as the user group.

CHAPTER 5
CONCLUSIONS AND RECOMMENDATIONS

Thailand may be behind the developed countries in the adoption of online food services, but it is definitely moving in the same direction. From the research, both the users and non-users of online food ordering services have social media as their main source of new information on food updates. Moreover, the concern over the safety of the payment system through online channels is no longer a barrier for service providers. The media consumption behavior along with the attitude acted as a good foundation for the online food ordering service industry to grow further.

The majority of users of online food ordering services have experience in ordering fast food, particularly pizza delivery, from one service provider or another. Ordering pizza delivery through an online channel is then considered as first entry-point for the users. As users became more familiar with the ordering system together with their value in convenience, their behavior will start to shift resulting in increased usage frequency, spending and in being more adventurous to go beyond only pizza ordering service.

For food vendors with limited resources available and wishing to enter the online food delivery marketplace, the first priority should be to target the user group, particularly the Tasty Quick Meal Seeker. The reason being they are the most valuable segment with the highest purchasing power as well as being the most frequent users of the service. This segment gives highest priority to taste followed by convenience. Their payment preference is by credit card; thus, to accommodate their needs, this type of payment method should be included. The type of promotion that they are attracted to more than other segments is the discount promotion. However, what appeals the most is free delivery and guaranteed delivery time.

There were no significant differences across segments as to service touch point aspects (website, application) and the media consumption, then, service providers could take advantage of one strategy execution, which will be effective to more than one segment. The user groups in general are heavy users of social media and websites, both of which signify that they receive information updates on food from the Internet. That being said, the service providers should set up easy to understand and easy to use websites or mobile applications, offer a variety of food, and state clearly promised delivery times. To emphasize the key marketing message on convenience and taste will pinpoint the Tasty Quick Meal Seeker segment as well as be likely to capture the Convenience Seeker segment at the same time.

The non-user group of online food delivery services is more difficult to tackle. This service is not deemed as expensive and price is not their concern (Appendix Q). The first and most crucial point is that they do not see the need for this kind of service and they turn to other available alternatives for obtaining food. Secondly, they doubt the quality of food that they would receive through delivery services. Finally, they lack the awareness of delivery coverage and delivery fees. All three of these act as barriers to the service providers in capturing this group of consumers since the solution requires significant investment in advertising and promoting the service. From the finding that the non-user group tends to consume mass media -TV and radio, and advertisements through these channels are only possible for the big market players. However, the non-user group is already a consumer of social media and receives updates from talking to friends and family more than those of users' groups; thus, this could be the light at the end of the tunnel to switch them to be users of online food ordering services.

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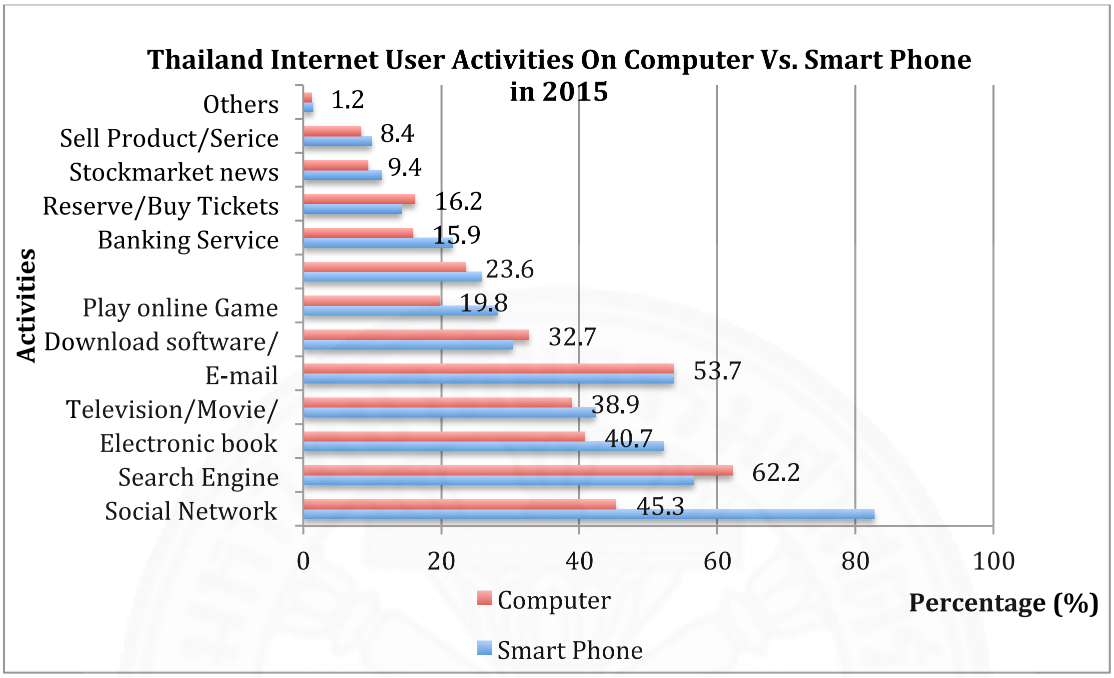
APPENDICES

APPENDIX A

THAILAND INTERNET USER PROFILE 2015: ACTIVITIES OVER THE INTERNET



APPENDIX B

INTERNET USER AND ACTIVITIES CATEGORIZED BY GENDER AND GENERATION (2015)

Internet user and activities categorize by gender and generation- 2015 (Computer)

	Percentage (%)	Social Network	E-mail	Search Engine	Electronic book	Stockmarket news	Banking Service	Purchase Product/ Service	Sell Product/ Service	Reserve/ Buy Tickets	Download software/music /drama/game	Play online Game	Television/ Movie/Radio
Gender	Male	55.2	65.9	72.4	51.2	15.5	24.5	30.2	10.9	18.9	42.8	23.3	42.5
	Female	41.9	58.8	64.3	41.0	7.5	15.7	24.2	8.5	18.4	26.8	12.9	36.1
	Third Gender	47.1	49.7	60.3	41.3	10.5	18.0	32.8	12.2	18.4	47.9	30.7	52.4
Generation	Z	35.3	22.9	38.9	21.6	3.3	2.9	11.4	3.9	7.5	27.1	27.8	37.6
	Y	48.4	56.2	64.7	42.8	9.4	17.7	26.5	10.0	18.6	37.6	21.7	43.1
	X	48.0	77.2	76.6	51.7	14.2	26.1	31.4	10.6	20.1	28.5	8.7	31.7
	Baby Boomer	43.2	70.3	74.7	55.5	16.8	17.8	19.7	4.5	18.2	23.4	8.9	30.1

Internet user and activities categorize by gender and generation- 2015 (Smart Phone Devices)

	Percentage (%)	Social Network	E-mail	Search Engine	Electronic book	Stockmarket news	Banking Service	Purchase Product/ Service	Sell Product/ Service	Reserve/ Buy Tickets	Download software/music /drama/game	Play online Game	Television/ Movie/Radio
Gender	Male	81.8	43.0	56.9	53.6	16.4	28.2	22.2	8.8	15.4	26.2	26.1	35.8
	Female	85.5	37.3	59.0	54.0	10.4	23.0	30.3	10.9	14.8	27.6	29.6	44.8
	Third Gender	90.5	40.7	61.9	57.1	10.5	31.2	29.1	13.2	17.9	40.0	36.0	49.7
Generation	Z	78.4	20.3	52.0	47.4	5.2	8.5	22.9	9.5	11.8	43.5	30.1	49.0
	Y	86.7	39.5	60.3	55.7	11.7	26.2	29.3	11.4	15.8	30.1	30.7	44.8
	X	83.0	45.2	57.4	53.8	17.1	28.5	25.0	8.8	15.9	21.5	25.5	35.9
	Baby Boomer	65.3	29.8	43.2	39.8	11.6	12.3	11.7	2.5	5.9	14.7	13.7	21.6

APPENDIX C

NUMBERS OF INDEPENDENT VS. CHAINED OPERATORS (2014)

outlets

	Independent	Chained	Total
100% Home Delivery/Takeaway	3,428	287	3,715
Cafés/Bars	11,375	2,334	13,709
Full-Service Restaurants	8,043	2,386	10,429
Fast Food	382	16,354	16,736
Self-Service Cafeterias	199	506	705
Street Stalls/Kiosks	79,672	11,357	91,029
Pizza Consumer Foodservice	-	495	495
Consumer Foodservice	103,099	33,224	136,323

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

APPENDIX D

SALES IN 100% HOME DELIVERY/ TAKEAWAY BY CATEGORY: FOOD SERVICE VALUE 2009-2014

THB million	2009	2010	2011	2012	2013	2014
Pizza 100% Home Delivery/Takeaway	4,901.7	5,029.4	5,277.6	5,779.0	6,241.3	6,606.2
- Chained Pizza 100% Home Delivery/Takeaway	4,901.7	5,029.4	5,277.6	5,779.0	6,241.3	6,606.2
- Independent Pizza 100% Home Delivery/ Takeaway	-	-	-	-	-	-
Other 100% Home Delivery/Takeaway	15,150.6	15,537.4	15,918.7	16,233.2	16,463.1	17,109.1
- Chained Other 100% Home Delivery/Takeaway	231.5	245.4	259.6	260.9	251.3	248.7
- Independent Other 100% Home Delivery/ Takeaway	14,919.1	15,292.1	15,659.1	15,972.3	16,211.8	16,860.3
Chained 100% Home Delivery/Takeaway	5,133.2	5,274.8	5,537.2	6,039.9	6,492.6	6,854.9
Independent 100% Home	14,919.1	15,292.1	15,659.1	15,972.3	16,211.8	16,860.3

APPENDIX E

SURVEY QUESTIONNAIRES

This questionnaire is part of independent study subject of Master in Marketing program, Thammasat University.
The objective of the research is to study the user and non-user of the online food ordering service in Thailand

* Order food online cover the time when you order food through telephone, website, mobile application or other platforms.

This questionnaire survey will take you around 10-15 minutes (21 questions) to complete.
Your time dedicated in doing this survey is highly appreciated.

* 1. Have you ever ordered food online? (via telephone, computer, mobile application)
คุณเคยสั่งอาหาร ผ่านช่องทางออนไลน์ไหม (ทางโทรศัพท์ เว็บไซต์ แอปพริเคชั่นบนมือถือ)

◯ Yes
เคย

◯ No
ไม่เคย

* 2. When do you order food online? (Can select more than one choice)
เพราะอะไรคุณจึงเลือกสั่งอาหารผ่านช่องทางออนไลน์ (สามารถเลือกได้มากกว่า 1 ข้อ)

☐ Busy day at work no time to go out
เป็นวันทำงานที่แสนยุ่ง ไม่มีเวลาออกจากออฟฟิศ

☐ Late night meal, Restaurant closed
เป็นอาหารมื้อดึก ร้านอาหารปิดแล้ว

☐ Traffic jam, don't want to go out
ข้างนอกรถติด จึงไม่อยากออกไป

☐ Family/friends gathering need food
มีเพื่อน/ครอบครัวมาหาที่บ้าน

☐ Specific craving
อยากกินอาหารบางชนิดเป็นพิเศษ

☐ Lazy to cook/ go out
ขี้เกียจทำอาหารกินเองหรือออกนอกบ้าน

☐ Need easy and quick meal
ต้องการกินอะไรง่ายๆ เร็วๆ

* 3. When order food online, where are you most of the time?
ปกติแล้ว เวลาคุณสั่งอาหารผ่านช่องทางออนไลน์ คุณอยู่ที่ใด

- ◯ Office
  ออฟฟิศ
- ◯ My home
  บ้าน
- ◯ My friend's home
  บ้านเพื่อน
- ◯ Other (please specify)

* 4. On average, how many times per year do you order food online?
โดยเฉลี่ยแล้วคุณสั่งอาหารผ่านช่องทางออนไลน์กี่ครั้งใน1 ปี

- ◯ 1-5
- ◯ 6-10
- ◯ 11-15
- ◯ 16-20
- ◯ >20

* 5. Which of these services have you ever used? (can select more than one choice)
ช่องทางในการสั่งซื้ออาหารออนไลน์ใดที่คุณเคยใช้มาก่อน (สามารถเลือกได้มากกว่า 1 ข้อ)

- ☐ Food Panda
  ฟู้ดแพนด้า
- ☐ Foodbyphone
  ฟู้ดบายโฟน
- ☐ Passion Delivery
- ☐ Pizza Delivery (Pizza Hut, Pizza Company, etc)
  พิซซ่า ดีลิเว่อร์รี่
- ☐ KFC/McDonald Delivery
- ☐ MK Delivery
  MK สุกี้ ดีลิเว่อร์รี่
- ☐ Other chain restaurant delivery
  ดีลิเวอร์ลี่จากร้านอาหารที่มีสาขาอื่นๆ

* 6. **What are the important factors when ordering food online? Please give ranking: 1 most important, 7 least important**
เรียงลำดับสิ่งใดที่คุณให้ความสำคัญมากที่สุดเวลาสั่งอาหารผ่านออนไลน์ (1 สำคัญมากที่สุด , 7 สำคัญน้อยที่สุด)

[ ]	Appearance of the ordering touchpoint (website,App) หน้าตา ความสวยงามของเว็ปไซต์,แอปพลิเคชั่น
[ ]	Ordering touchpoints is user friendly เว็บไซต์ แอปพลิเคชั่นใช้งานง่าย
[ ]	Payment options available มีทางเลือกในการจ่ายเงิน
[ ]	Past users reviews มีรีวิวจากลูกค้าให้อ่าน
[ ]	Clearly state delivery time กำหนดเวลาส่งอย่างชัดเจน
[ ]	Variety of food available มีอาหารให้เลือกหลายเมนู
[ ]	Price ราคา

* 7. When purchasing online, which type of food do you purchase most often? (Can select more than one choice)
คุณสั่งอาหารประเภทใดผ่านออนไลน์มากที่สุด(สามารถเลือกได้มากกว่า 1 ข้อ)

- [ ] Ingredient (raw meat, cheese, dairy product, etc)
  วัตถุดิบในการประกอบอาหาร (เนื้อ,ชีส เป็นต้น)
- [ ] Thai
  อาหารไทย
- [ ] Chinese
  อาหารจีน
- [ ] Japanese
  อาหารญี่ปุ่น
- [ ] American
  อาหารอเมริกัน
- [ ] Italian
  อาหารอิตาเลี่ยน
- [ ] Fast food (KFC, McDonald, Chain Pizza)
  อาหารฟาสต์ฟู้ด
- [ ] Other (please specify)

[ ]

* 8. What is your average spending per person when you order food online?
โดยเฉลี่ย เวลาคุณสั่งอาหารผ่านทางออนไลน์ คุณใช้จ่ายเท่าไหร่ ต่อ 1 หัว

- ◯ Less than
  น้อยกว่า ฿100
- ◯ ฿100 - ฿200
- ◯ ฿201 - ฿300
- ◯ ฿301 - ฿400
- ◯ ฿401 - ฿500
- ◯ More than
  มากกว่า ฿500

* 9. What is your usual payment method?
ปกติคุณเลือกวิธีใดจ่ายค่าอาหารที่สั่งทางออนไลน์

- ◯ Online Payment (VISA,MasterCard)
  จ่ายด้วยบัตรเครดิตทางออนไลน์
- ◯ Transfer payment
  โอนเงิน
- ◯ CASH on delivery
  จ่ายเงินสด ตอนของมาส่ง
- ◯ PayPal

* 10. If you could choose your payment method, what would it be?
ถ้าสามารถเลือกได้ คุณอย่างจ่ายด้วยวิธีใด

- ◯ Online Payment (VISA,MasterCard)
  จ่ายด้วยบัตรเครดิตทางออนไลน์
- ◯ Transfer payment
  โอนเงิน
- ◯ CASH on delivery
  จ่ายเงินสด ตอนของมาส่ง
- ◯ PayPal
- ◯ Other (please specify)
  อื่นๆ (โปรดระบุ)

* 11. On a scale of 1 to 7, please select how you feel toward online food ordering service. (7 strongly **AGREE**, 1 strongly **DISAGREE**)
คุณรู้สึกอย่างไรต่อการสั่งอาหารผ่านทางออนไลน์ (7 **เห็นด้วย**อย่างมาก , 1 **ไม่เห็นด้วย**อย่างมาก)

	1	2	3	4	5	6	7
It is convenient สะดวก	○	○	○	○	○	○	○
It offers great varieties in food choices มีประเภทอาหารให้เลือกเยอะ	○	○	○	○	○	○	○
The food tastes good รสชาติอาหารดี	○	○	○	○	○	○	○
The delivery time is fast อาหารมาส่งได้รวดเร็ว	○	○	○	○	○	○	○
The order process is easy ขั้นตอนในการสั่งง่าย	○	○	○	○	○	○	○
Payment system is safe มั่นใจในการจ่ายเงินว่าปลอดภัย	○	○	○	○	○	○	○
The food quality is indifferent to dining at the restaurant คุณภาพของอาหารไม่ต่างจากการไปกินที่ร้านอาหาร	○	○	○	○	○	○	○

* 12. On a scale of 1 to 7, please select how these factors affect your decision to order food online. (7 strongly agreed, 1 strongly disagree)
สิ่งต่อไปนี้มีผลกระทบต่อการตัดสินใจในการสั่งอาหารทางออนไลน์ ของคุณอย่างไร (7 มีผลกระทบมากที่สุด , 1ไม่มีผลกระทบเลย)

	1	2	3	4	5	6	7
Discount Promotion ส่วนลด	○	○	○	○	○	○	○
Cheaper when order online ราคาถูกกว่า ถ้าสั่งผ่านออนไลน์	○	○	○	○	○	○	○
Recommended by friends/family เพื่อน/ครอบครัวแนะนำมา	○	○	○	○	○	○	○
Buy 1 get 1 Free ซื้อ 1 แถม 1	○	○	○	○	○	○	○
Free delivery ส่งฟรี	○	○	○	○	○	○	○
Points Earned and Reward เก็บสะสมแต้มแลกของได้	○	○	○	○	○	○	○
Guarantee delivery within 45 minutes or else free รับประกันส่งภายใน 45 นาที ไม่งั้นกินฟรี	○	○	○	○	○	○	○

* 13. Which one of these best describes you? (You can select more than one choice)
ข้อไหนเหมือนตัวคุณมากที่สุด (สามารถเลือกได้มากกว่า 1 ข้อ)

- [ ] I regularly exercise
คุณออกกำลังกายอยู่เป็นประจำ
- [ ] I like to cook when I have time
เมื่อมีเวลาว่างคุณชอบทำอาหาร
- [ ] I like to go out with my friends (dining,movie,shopping,etc)
คุณชอบออกไปพบปะเพื่อนฝูง (ช้อปปิ้ง,กินข้าว,ดูหนัง)
- [ ] I like to just be at home relaxing
คุณชอบพักผ่อนอยู่บ้าน
- [ ] I like to invite friends over to hang out at my place
คุณชอบชวนเพื่อนมาที่บ้าน
- [ ] I love my job!
คุณรักงานของคุณมาก

* 14. I catch the latest update on food in… (Can select more than one choice)
คุณรับข่าวสารเกี่ยวกับอาหารจากช่องทางใด (สามารถเลือกได้มากกว่า 1 ข้อ)

- [ ] Social Media (Facebook, Instagram, blogs, etc)
สังคมออนไลน์
- [ ] Free Magazine (Guru, BK, EDT, etc)
นิตยสารแจกฟรี
- [ ] Magazine
นิตยสาร
- [ ] Radio
วิทยุ
- [ ] TV
ทีวี
- [ ] Website
เว็ปไซต์
- [ ] Talking to my friends/family
คุยกับเพื่อน/ครอบครัว
- [ ] I don't search for food information
คุณไม่ค้นหาข้อมูลข่าวสารของอาหาร

* 15. What is your gender?
เพศ

- Female
หญิง
- Male
ชาย
- Third Gender
เพศที่สาม

* 16. What is your age?
คุณอายุเท่าไหร่

- < 20
- 21-25
- 26-30
- 31-35
- 36-40
- 41-45
- > 45
- Other (please specify)
อื่นๆ (โปรดระบุ)

* 17. What is your education level?
วุฒิการศึกษาสูงสุดของคุณ

- High School
มัธยมปลาย
- Vocational School
ปวช./ปวส.
- Bachelor Degree
ปริญญาตรี
- Graduate Degree
ปริญญาโท
- Post-Grad Degree
ปริญญาเอก

* 18. Please select your work place area.
สถานที่ทำงานของคุณตั้งอยู่ที่ใด

- Sukhumvit (1-71)
  สุขุมวิท 1-71
- Silom
  สีลม
- Sathorn
  สาทร
- Rama 4
  พระราม 4
- Rama 9
  พระราม 9
- Phahonyothin
  พหลโยธิน
- Other (please specify)
  อื่นๆ (โปรดระบุ)

* 19. Please select your residential area.
บ้านพักอาศัยของคุณตั้งอยู่ที่ใด

- Sukhumvit (1-71)
  สุขุมวิท (1-71)
- Silom
  สีลม
- Sathorn
  สาทร
- Rama 4
  พระราม 4
- Rama 9
  พระราม 9
- Phahonyothin
  พหลโยธิน
- Other (please specify)
  อื่นๆ (โปรดระบุ)

* 20. Please identify your monthly income range?
กรุณาระบุรายได้ของคุณโดยเฉลี่ยต่อเดือน

- ◯ Currently no income
  ไม่มีรายได้
- ◯ ฿20,000-฿40,000
- ◯ ฿40,001-฿60,000
- ◯ ฿60,001-฿80,000
- ◯ ฿80,001-฿100,000
- ◯ ฿100,001-฿120,000
- ◯ > ฿120,001

* 21. What is your occupation/employment status?
อาชีพ/สถานะการงานของคุณ

- ◯ Student
  นักเรียน/นักศึกษา
- ◯ Self-employed
  เจ้าของกิจการ
- ◯ Corporate employee
  พนักงานบริษัท
- ◯ Government Officer
  ข้าราชการ/พนักงานรัฐวิสาหกิจ
- ◯ Freelance
  ฟรีแลนซ์
- ◯ Unemployed
  ว่างงาน
- ◯ Retired
  เกษียณ
- ◯ Housewife
  แม่บ้าน
- ◯ Other (please specify)

  ____

* 22. What is your nationality?
สัญชาติ

- ◯ Thai
  คนไทย
- ◯ Non-Thai
  ชาวต่างชาติ

* 23. Which of these services have you ever heard of ? (Can select more than one choice)
ช่องทางในการสั่งซื้ออาหารออนไลน์ใดที่คุณเคยได้ยินมาก่อน(สามารถเลือกได้มากกว่า 1 ข้อ)

- ☐ Food Panda
  ฟู้ดแพนด้า
- ☐ Foodbyphone
  ฟู้ดบายโฟน
- ☐ Passion Delivery
- ☐ Pizza Delivery (Pizza Hut, Pizza Company, etc)
  พิซซ่า ดีลิเว่อร์รี่
- ☐ KFC/McDonald Delivery
- ☐ MK Delivery
  MK สุกี้ ดีลิเว่อร์รี่
- ☐ Other chain restaurant delivery
  ดีลิเวอร์ลี่จากร้านอาหารที่มีสาขาอื่นๆ

* 24. When some people order food online because of convenient, what action you are likely to take when you need something to eat? **(7 most likely, 1 least likely)**
ในเวลาที่มีบางคนเลือกสั่งอาหารผ่านช่องทางออนไลน์เพราะต้องการความสะดวก คุณทำอย่างไรเมื่อต้องการหาของทาน (7 เหมือนคุณมากที่สุด ,1 ไม่เหมือนคุณเลย)

	1	2	3	4	5	6	7
Walk/drive out for street food vendor เดิน/ขับรถไปหาร้านข้างทางทาน	○	○	○	○	○	○	○
Search for ingredients in the fridge and cook something หาวัตถุดิบในตู้เย็นมาทำทาน	○	○	○	○	○	○	○
Go to convenient store nearby and grab food. (7/11, Family Mart,etc) ไปซื้ออาหารที่ร้านสะดวกซื้อใกล้ๆ	○	○	○	○	○	○	○
Heat up frozen food in my freezer. อุ่นอาหารแช่แข็งทาน	○	○	○	○	○	○	○
Drive to a drive-thru restaurant. ขับรถไปซื้ออาหารผ่านบริการ Drive-thru	○	○	○	○	○	○	○
Ask someone to buy food and bring to me ฝากคนซื้อมาให้	○	○	○	○	○	○	○

* 25. On a scale of 1 to 7, please select how much you agree with each statement on online food ordering service **(7 strongly agree, 1 strongly disagree)**
คุณมีความเห็นเช่นใดต่อข้อความต่อไปนี้เกี่ยวกับการสั่งอาหารทางออนไลน์ (**7= เห็นด้วยอย่างยิ่ง , 1=ไม่เห็นด้วยอย่างยิ่ง)**

	1	2	3	4	5	6	7	
Expensive แพง								
The quantity receive is too little ได้ปริมาณน้อย								
The food is not fresh อาหารไม่สด								
Complicated ordering system วิธีการสั่งยุ่งยาก								
Delivery fee is expensive ค่าส่งแพง								
Insecure payment system วิธีจ่ายเงินไม่ปลอดภัย								
Taste is bad ไม่อร่อย								
I have no moment when I need this service ไม่มีความจำเป็นต้องใช้บริการนี้								
Unsure if delivery cover my area ไม่แน่ใจว่าบริการส่งครอบคลุมพื้นที่ตัวเองไหม								
The food is cold when it arrives อาหารมีสภาพเย็นพอมาถึง								

* 26. What is a reasonable spending (per person) if you were to make online food order?
ถ้าคุณมีโอกาสได้สั่งอาหารผ่านช่องทางออนไลน์ ค่าใช้จ่ายต่อหัวที่เหมาะสมอยู่ที่เท่าไหร่

- < ฿100
- ฿100 - ฿200
- ฿201 - ฿300
- ฿301 - ฿400
- ฿401 - ฿500
- > ฿500

APPENDIX F

RESPONDENT DEMOGRAPHIC

		N	%
Gender	Female	79	58.1%
	Male	56	41.2%
	Third Gender	1	.7%
Age	< 20	0	0.0%
	21-25	8	5.9%
	26-30	73	53.7%
	31-35	29	21.3%
	36-40	10	7.4%
	41-45	13	9.6%
	> 45	1	.7%
	Others	2	1.5%
Education	High School	0	0.0%
	Vocational School	0	0.0%
	Bachelor Degree	40	29.4%
	Graduate Degree	95	69.9%
	Post-Grad Degree	1	.7%
Monthly income	Currently no income	5	3.7%
	20,000-40,000	33	24.3%
	40,001-60,000	40	29.4%
	60,001-80,000	24	17.6%
	80,001-100,000	11	8.1%
	100,001-120,000	3	2.2%
	> 120,001	20	14.7%
Occupation/employment status	Student	6	4.4%
	Self-employed	30	22.1%
	Corporate employee	72	52.9%
	Government Officer	10	7.4%
	Freelance	8	5.9%
	Unemployed	6	4.4%
	Retired	2	1.5%
	Housewife	1	.7%
	Others	1	.7%

APPENDIX G

SUMMARY OF USER DEMOGRAPHIC (n= 101)

User Demographic		N	%
Gender	Female Male Others	60 40 1	59.4% 39.6% 1.0%
Age	21-25 26-30 31-35 36-40 41-45 >45	6 54 25 8 7 1	5.9% 53.5% 24.8% 7.9% 6.9% 1.0%
Education	High School Vocational School Bachelor Degree Graduate Degree Post-Graduate Degree	- - 26 74 1	- - 25.7% 73.3% 1.0%
Occupation	Student Self-employed Corporate employee Government officer Freelance Unemployed Retired Housewife Others	6 22 53 6 6 6 - 1 1	5.9% 21.8% 52.5% 5.9% 5.9% 5.9% - 1.0% 1.0%
Income	Currently no income ฿20,000-฿40,000 ฿40,001-฿60,000 ฿60,001-฿80,000 ฿80,001-฿100,000 ฿100,001-฿120,000 > ฿120,001	3 27 28 18 7 3 15	3.0% 26.7% 27.7% 17.8% 6.9% 3.0% 14.9%

APPENDIX H

SUMMARY OF USER GEOGRAPHIC AREA

		Sukhumvit (1-71)	Silom	Sathorn	Rama 4	Rama 9	Phahonyothin	Viphavadee	Lad Prao	Thonburi	Others
Work place	**N**	22	5	9	7	11	10	6			31
	%	21.8	5.0	8.9	6.9	10.9	9.9	5.9			30.7
Residential area	**N**	22	3	7	1	7	16		6	9	30
	%	21.8	3.0	6.9	1.0	6.9	15.8		5.9	8.9	29.8

APPENDIX I

MONTHLY INCOME VERSUS TYPE OF FOOD ORDERED

		Monthly income						
		No income	20,000-40,000	40,001-60,000	60,001-80,000	80,001-100,000	100,001-120,000	> 120,001
		%	%	%	%	%	%	%
Type of Food	Order ingredient	12.5	25.0	12.5	25.0	0.0	0.0	25.0
	Thai Food	4.3	17.4	**30.4**	4.3	17.4	0.0	**26.1**
	Chinese Food	12.5	12.5	12.5	12.5	0.0	0.0	**50.0**
	Japanese Food	2.9	**26.5**	**32.4**	11.8	8.8	2.9	14.7
	American Food	6.3	6.3	**62.5**	12.5	0.0	6.3	6.3
	Italian Food	6.9	**20.7**	**31.0**	17.2	3.4	0.0	**20.7**
	Fast Food	2.3	**26.1**	**28.4**	19.3	8.0	2.3	13.6
	Other Food	0.0	0.0	**37.5**	12.5	**25.0**	0.0	**25.0**

APPENDIX J

FACTOR ANALYSIS OF USER GROUP

Rotated Component Matrix				
	Component			
	1	2	3	4
The delivery time is fast	.800			
It is convenient	.790			.346
The order process is easy	.729		.345	
The food tastes good		.856		
The food quality is indifferent to dining at the restaurant		.697	.590	
Payment system is safe			.912	
It offers great varieties in food choices				.933

APPENDIX K

USER LIFESTYLE BY SEGMENT

	Convenient Seeker		Variety Seeker		Tasty Quick Meal	
	N	%	N	%	N	%
Exercise Lifestyle	6	27.3%	8	24.2%	16	34.8%
Enjoy cooking	8	36.4%	7	21.2%	10	21.7%
Enjoy going out	17	77.3%	17	51.5%	29	63.0%
Enjoy being home	14	63.6%	25	75.8%	35	76.1%
Enjoy hang out at home with friends	4	18.2%	2	6.1%	7	15.2%
Enjoy working	4	18.2%	4	12.1%	7	15.2%

APPENDIX L

TOUCH POINT EFFECT BY SEGMENTS

		Convenient Seeker	Variety Seeker	Tasty Quick Meal Seeker
Appearance of the ordering touch point (website,App)	Mean	5.3182	5.1515	5.0000
	Standard Deviation	1.91203	1.67931	2.09762
Ordering touch points is user friendly	Mean	3.3636	3.1818	3.6522
	Standard Deviation	1.86562	1.82782	2.02449
Payment options available	Mean	4.7273	4.3030	4.2609
	Standard Deviation	1.51757	1.72273	1.67908
Past users reviews	Mean	5.4091	5.3333	5.0870
	Standard Deviation	1.40269	1.74404	1.89533
Clearly state delivery time	Mean	3.1364	2.9697	3.3913
	Standard Deviation	1.52114	1.55090	1.66638
Variety of food available	Mean	2.4091	3.1515	2.9565
	Standard Deviation	1.84285	2.12311	2.01060
Price	Mean	3.6364	3.9091	3.6522
	Standard Deviation	1.94068	1.99003	1.68941

APPENDIX M

NON-USER GEOGRAPHIC PROFILE

		Sukhumvit (1-71)	Silom	Sathorn	Rama 4	Rama 9	Phahonyothin	Viphavadee	Lad Prao	Thonburi	Others
Work place	N	6	2	4	-	4	4	6	-	-	9
	%	17.1	5.7	11.4	-	11.4	11.4	17.1	-	-	25.9
Residential area	N	9	-	2	-	2	2	-	4	2	14
	%	25.7	-	5.7	-	5.7	5.7	-	11.4	5.7	40.1

APPENDIX N

NON-USER AWARENESS OF SERVICE

Service Provider	N	%
Food Panda	19	54.3%
Food by Phone	2	5.7%
Passion Delivery	0	0.0%
Pizza Delivery	29	82.9%
KFC, McDonald	31	88.6%
MK Delivery	23	65.7%
Other Chain Delivery	14	40.0%

APPENDIX O

PROMOTION ATTRACTIVENESS TO USER AND NON-USER

Promotion Strategy	**User**	**Non User**
	Mean	Mean
Free delivery	5.87	5.80
Buy 1 get 1 Free	5.39	5.63
Guarantee delivery within 45 minutes or else free	5.33	5.51
Discount Promotion	5.20	5.69
Cheaper when order online	4.88	5.11
Recommended by friends/family	4.66	4.71
Points Earned and Reward	3.99	4.37

APPENDIX P

SERVICE PERCEPTION OF USER AND NON-USER

Perception of service		N	Mean	Std. Deviation
It is convenient	User	101	6.1386	1.44934
	Non User	35	5.4286	1.19523
It offers great varieties in food choices	User	101	4.7723	1.43444
	Non User	35	4.6571	1.18676
The food tastes good	User	101	4.4356	1.36686
	Non User	35	3.6857	1.05081
The delivery time is fast	User	101	5.0495	1.40268
	Non User	35	3.9143	1.54104
The order process is easy	User	101	5.3564	1.26162
	Non User	35	3.8286	1.44478
Payment system is safe	User	101	5.1782	1.41701
	Non User	35	4.2857	1.29641
The food quality is indifferent to dining at the restaurant	User	101	4.1980	1.72638
	Non User	35	3.7143	1.65514

APPENDIX Q

SPENDING FOR USER AND NON-USER

<table>
<tr><th colspan="2">Spending for online food</th><th>N</th><th>%</th><th>N</th><th>%</th></tr>
<tr><td rowspan="6">Average spending for user OR Acceptable spending for non-user</td><td>< Baht 100</td><td>0</td><td>0.0%</td><td>2</td><td>5.7%</td></tr>
<tr><td>Baht 100 – Baht 200</td><td>19</td><td>18.8%</td><td>4</td><td>11.4%</td></tr>
<tr><td>Baht 201 – Baht 300</td><td>36</td><td>35.6%</td><td>16</td><td>45.7%</td></tr>
<tr><td>Baht 301 – Baht 400</td><td>22</td><td>21.8%</td><td>2</td><td>5.7%</td></tr>
<tr><td>Baht 401 – Baht 500</td><td>6</td><td>5.9%</td><td>9</td><td>25.7%</td></tr>
<tr><td>> Baht 500</td><td>18</td><td>17.8%</td><td>2</td><td>5.7%</td></tr>
</table>

BIOGRAPHY

Name	Miss Varunthip Towanasutr
Date of Birth	May25, 1986
Educational Attainment	2010: Bachelor of Business Administration, Chulalongkorn University
	2015: Master's Degree Program in Marketing, Thammasat University
Work Position	Founder Knife & Fork Ribs
Work Experiences	Founder (2014- Present) Knife & Fork Ribs
	Chief Executive Officer (2011-2014) Kawamura Electric Sales (Thailand) Co., Ltd.
	Audit Assistant (2010) KPMG Phoomchai Audit Ltd.