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AN ANALYTICAL STUDY OF CONSUMERS' ATTITUDE TOWARDS ONLINE FOOD DELIVERY START-UPS IN GUNTUR CITY WITH SPECIAL REFERENCE TO SWIGGY AND ZOMATO

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ABSTRACT

Food delivery mechanism has taken a dramatic turn with the advent of food delivery start-ups, Swiggy and Zomato in Guntur as elsewhere aided by the smart phones and other technological innovations of the digital age. With the proliferation of the e-commerce space in India, food start-ups have been rapidly emerging in the country. Earlier, the most common form of delivery was the traditional model in which the consumer telephoned the restaurant, ordered food and waited for the restaurant to deliver it. With the rise of digital technology, this market is being redefined. Customers are now increasingly using mobile apps or websites to identify nearby restaurants, scan menus to select the cuisine and order food with the click of a button or tap of a finger. A few decades back, food delivery was confined to a few apps like pizza and Chinese but slowing the winds of change start blowing steadily and each year gathering momentum. Now it is evident that the food delivery market is on the pedestal worth billions of dollars. Considering its importance and its presence in the lives of people the research was intended to explore how people would respond to the services of Swiggy and Zomato and their presence in Guntur city. Making use of descriptive research, rigorous procedures of statistical tools and analytical computational tools the study explores ways to enhance the market base of Swiggy and Zomato in Guntur. A sample of 100 respondents were taken and questionnaires were administered to them. Certain seminal conclusions were inferred from the study based on the data analyzed with the help of rigorous statistical tools. The study brings out the fact that the food delivery apps have bright prospects if they address certain issues bearing on their customers.

Keywords: customer, attitude, online food delivery, start-ups, restaurants, services

1. Introduction

It goes without saying that consumers have switched over to online shopping with all ease through smartphones, apps or websites without any hassles and with transparency. Google Play Store and the IOS Apple Store are the two major channels that mobile consumer made use to download the various apps. Indeed, food delivery services did prevail in India since the last decade of the 19th century especially with services rendered by the Mumbai *dabba wallas*- people carrying lunch boxes on payment. However, the proliferation online purchases precipitated by the information revolution altered the system beyond one's imagination and online food delivery system has made inroads since 2010 with Zomato, Swiggy, Domino's, Food Panda etc., which have become online market vendors. Though such services have been handy in many parts across the world since 2000, their services became pronounced from about a decade in Guntur. In the paper, the business practices of the online food delivery start-ups in Guntur with special reference to Swiggy and Zomato are going to be explored and studied analytically. Divided into three parts, the paper sheds light on start-ups, Zomato and Swiggy, the pattern of food culture as elucidated in three stages of online food delivery, their business strategies, scope and significance of the study, research questions, limitations, research review and gap in the study were dwelt upon in the first part. In the second part, the analysis and interpretation of the study was given. In the third part, it was concluded that there was a symbiotic relationship between the weight of holistic consumer experience provided by online food delivery apps and the choices of consumers.

1. Profiles of the Start-ups - Zomato and Swiggy

The expression start-up means "a newly established business entity or company". Though East India Company set up by a bunch of entrepreneurs in 15th century, it has gained much currency ever since the globalization and information revolution have started blowing over about two decades back. In its initial stages of business, the people who founded their start-ups generally fund them or they endeavour to secure investment from various people which may include venture capitalists, bank loans and resource pooling. This pattern can be observed in all the start-up's including Swiggy and Zomato-online food delivery platforms.

Operated by Bundl Technologies Private Limited, Swiggy is India's largest online food ordering and delivery platform. It was set up in 2014. At present it is headquartered in Bangalore. It acquired several food start-ups and platforms. Now it functions over five hundred cities. Involved actively in food delivery, Swiggy is also noted for its services by name, on-demand grocery deliveries-Instamart and an instant package delivery service-Genie. Though started relatively late, it has outpaced Zomato in Guntur.

Set up in 2008, Zomato started off as a restaurant discovery and rating platform. It furnished information, menus and customer-reviews of restaurants as well as food delivery options from partner restaurants in select cities. In 2015, it went beyond being just a food discovery portal by venturing into food delivery services, a year after Swiggy was founded. In contrast to Swiggy, Zomato has larger diversity of services including warehouse operations and international footing in food delivery services

Although Zomato was set up long before Swiggy, the latter is the true consolidator of the food delivery ecosystem in India as food delivery is its core business. Both, Swiggy and Zomato have its business in the vibrant city, Guntur. Located nearly in the centre of Andhra Pradesh, it is the third-largest city connecting almost all parts in the state. It is one of the important educational, business and trade centre witnessing rapid urbanization due to business and employment opportunities. It is on the pedestal of India's map as it figures atop in chilli, cotton and tobacco and houses the largest chilli market-yard in Asia. It is part and parcel of East Coast Economic Corridor, housing offices and commercial complexes. It can be safely surmised that it is rightly placed to grab the attention of online food service providers.

Satisfaction is fulfillment of a person's desires or expectations. The fortunes of a company are greatly determined by the qualitative services it provides. Though it is an abstract idea, it can be quantified pressing ratings, surveys and Customer Satisfaction Score, popularly known as CSAT into service by way of measurement. Some rating scales like 1-3, 1-5, or 1-7 are used to quantify it and by adding the sum of the scores and dividing the sum of all scores it can be measured. Interviews and questionnaires are the other techniques are of great use in this direction.

I.1.Smart Phones- Mobile Apps

The advent of the smart phone, in particular, has significantly affected food culture and habits all over the world. This has, in part, been driven by the evolution of the Internet as a powerful platform for all kinds of business entities, including the food industry. An important area of digital connectivity that has influenced the eating habits in India has been online shopping. Online shopping also enables more choices and options to compare between products and prices (Haubl & Trifts 2000), than conventional brick-and-mortar shops. Thus, online stores have become an essential channel for sales of a wide range of products, and they improved their services and revenues in the following three stages.

I.2. Stages of Online Food Delivery

Though online food delivery has been rife, it is rightly poised to become a booming enterprise given the unprecedented changes in the life styles of people across the world. The following states can be noted: In the initial stage (2014 - 2016) online food delivery was in its nascent phase. The phenomenal Internet penetration and the escalation of smartphone users, brought about by Jio revolution created a paradigm shift in the market towards the end of 2015. Some tech start-ups sought to exploit it to their advantage in the realm of food delivery. In the consolidation stage (2017- 2019) many mergers and acquisitions took place, as it were. Restaurant flea or swap market and cloud kitchen – not in Guntur - emerged. However, the stage was also dominated by subsidies in delivery costs and increased penetration of apps aided by smart phones in the market. In the final phase, expansion and customization that has roughly started since 2019, food tech delivery platforms have witnessed huge investments as it attracted entrepreneurs across the world. The focus is now on expansion and customization of services to keep consumers in their fold through membership clubs, loyalty programs and high-quality service by offering special concessions to customers on special days by the food aggregators like Swiggy and Zomato. These food aggregators work on a digital platform in the form of user-friendly mobile application, which has brought restaurants close to consumers. With a population of 1.2 billion people, nearly 50 % of which, is under the age of 25, India is undoubtedly one of the largest business markets in the world (AIMS Report). Fast food demand in India is driven to a large extent by the young population and this has been a critical factor in the growth of the food and beverage sector and particularly of food aggregators.

I.3.Expansion Business Strategies

Swiggy launched "Swiggy Access", its first kitchen-based centre at Marathahalli, with Bangalore acting as its nucleus. It was conceived with an understanding of the consumers' needs and requirements and comes fully equipped with kitchen spaces. It in turn gives its restaurant partners access to the Bengaluru-based food delivery start-up's delivery fleet. The kitchens work on a plug-and-play model, in which, restaurants bring in their own equipment and need to simply start operations. Swiggy currently has more than 600 kitchens. Bengaluru-based Swiggy has launched two private kitchens namely Goodness Kitchen and Breakfast Express. This came two years after it launched its first cloud kitchen project Bowl Company in the city (Economic Times, 2019).

Even though Zomato's fortunes did change after venturing into food delivery, the start-up's eventual target is to capture both the supply and the demand side of the restaurant market. This can be seen in its investments in establishing a chain of warehouses, carving their niche in the budding concept

of 'Cloud Kitchen', launching B2B groceries platform Hyperpure and membership subscriptions such as Zomato Gold, Zomato Pro.

Most of the food technology players are interested in hybrid cloud kitchen that operates as a hub-and-spoke model. This hybrid model uses a combination of cloud kitchen delivery and outlets or cafes. It is different from a restaurant chain and a cloud kitchen only model. While the restaurant chains mostly focus on walk-ins and cloud kitchens focus on food delivery, the hybrid model leverages the best of both. Datalabs by Inc42 found that cloud kitchens are able to make 10% profit as compared to dine-in restaurants making 3% profit.

I.4.Statement of the Research Problem

This study was intended to explore the nature of "Online Food Delivery and Customers' Attitude towards Food Delivery Start-ups in Guntur with Special Reference to Swiggy and Zomato".

I.5. Significance and Scope of the Study

Online food delivery has become an emerging area which impacts the life styles of people and provides employment to lakhs of others. Scores of reports brought out the fact that the global online food industry is expected to grow exponentially by leaps and bounds and India is no exception. The online food delivery apps market amasses a significant market share in the stock market and the huge success of Zomato's Initial Public Offer in 2021 is a proof in this direction. Most research studies, hitherto, have focussed on the role of value systems on people's traditional lifestyles and choices in dietary life but have not explored the online delivery of food items through mobile or other net-based apps. It is clear that online food delivery market is poised to grow exponentially in the days to come. However, the online platform apps in their bid to win over customers offer discounts which have dented their revenues substantially. It is further compounded since how customers respond to the ever-expanding market as it becomes a lifeline during tough times of COVID-19. Hence, the study was embarked upon to find out answers to the following research questions. The pressure is on for the platforms. Despite explosive growth, they are struggling to make a profit. And, as the *Wall Street Journal* has reported, these companies aren't expected to become profitable for a number of years.⁵ Nonetheless, there is opportunity for upside, as platforms tap into new revenue sources and curb certain costs.

I.6. Research Questions

The analytical study in the paper sought to secure answers to the questions mentioned hereunder:

1. What are the pertinent issues being faced by consumers with online food delivery apps, Swiggy and Zomato ?
2. What are the future prospects of Swiggy and Zomato in Guntur?
3. What methods and strategies do the customers use to get quality services from the food delivery apps?
4. Do variables like marital status, education and economic position influence customers' behaviour in their choice between the two online food order delivery platforms in Guntur?
5. What is the quality of services being provided to their respective customers by Swiggy and Zomato in Guntur?

I.7. Objectives of the Study

The following objectives were kept in mind which are based on research questions.

1. To find out the attitude of customers towards the online food delivery apps, Swiggy and Zomato.
2. To comprehend the future prospects of the food delivery platforms in Guntur.
3. To explore the methods and strategies they adopt in order to attract customers' trust.

4. To find out whether marital status and economic status, level of education are crucial determinants when it comes to the choice between Swiggy and Zomato.

1.8.Hypothesis

The customers are happy with the consumer experience of Swiggy than that of Zomato.

1.9 Limitations of the Study:

The study has certain constraints which are detailed below:

1. The present study seeks to study the pattern of food delivery platforms of Swiggy and Zomato in Guntur city via smart phones with a relatively small sample and hence, may be subject to sampling errors.
2. The study did not study order of high-margin items such as wine and other alcoholic drinks but only food items as they may have better margins and so taking them into the present would make the study unreliable.
3. The study seeks to explore some of the variables like education, gender, speed of the delivery, choice of the online platform etc. of the customers. It did not devote its attention to study the overall function of either Swiggy or Zomato.
4. The attitude of customers under the study underwent some troubles owing to COVID-19 pandemic and therefore, its results should not be applied to customers' stance during normal times.

2. Review of Literature

Online food delivery platforms were of recent origin, started about a decade in Guntur. Customers gradually gravitate towards them. The following are important studies conducted on this domain:

Shukla, A. (2011) stated that entrepreneurial ecosystems was very crucial for online food delivery businesses to be not only innovative but hardworking and incisively clever. Bhotvawala et al. (2016), analysed the growth of food tech in India and provided a comparative study of food aggregator delivery services. The study compared the four booming food delivery companies in India, viz., Zomato, Swiggy, Foodpanda and Tinyowl. Kapoor & Vij (2018) discussed Indian online food aggregators; their research examined visual design, informational design and collaboration design of the online food aggregators. Kim Dang et al. (2018) dwelt on the fluctuating temperaments of customers which have a rebounding effect on the online food platforms and their products. The entire ecosystem of a firm plays a lion's share in deciding financial wellbeing of it and customers' attitudes. Meenakshi, Sinha. (2019) explained that the structure of competition would be the means of differentiation and customer loyalty. Rummo et al. (2020) explored the intimate connection between the youth-targetted online delivery platforms and their effect on different demographic population in general and youth in particular as they are surrounded by social media. Ahuja, Kabir et al (2022) stated that brand, real estate, operating efficiency, breadth of offerings, and changing consumer habits are bound play key role as to which stakeholder win or lose. It also noted that it is a cost-intensive business that is low-margin and scale driven.

2.1. Gap in Research: The current research work empirically identifies various issues related to online food platforms apps. The factors that drive Indian consumers.

3. Research Methodology

A research plan is the heart and soul of research since techniques and procedures for gathering and analysing the secured data to fix the issue.

3.1. Research Tool: A questionnaire was developed to collect the required information from the respondents. Of the questions, a few were open ended but most of them were close ended. Pilot Study:

A small size of population cutting across different parts of the region was selected to forecast and address the issues being faced. Research Design: The descriptive research design was employed with quantitative data analysis which would give conclusive and concise results.

3.2. The Sample size is 100. Care was taken to give adequate representation keeping in mind education, gender and other variables in mind. The food delivery startup companies were covered under the study where the appropriate weightage was given based on the geographical area.

3.3. Sampling Technique: Simple Sample technique was performed to collect valid from the population. Simple random sampling technique is used for this research work.

3.4. Sources of Data: The present research considered both primary and secondary data. The primary data was collected through questionnaires and the secondary data was compiled from websites, e-journals, research articles and books.

3.5. Statistical Tools: The data that was collected from different sources was computed, classified, tabulated, analysed and interpreted. Pareto chart, variance and mean were used to analyze the data to arrive at meaningful conclusions.

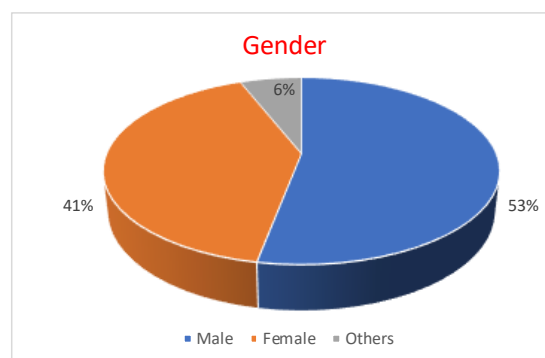
3.6. Research Method: Quantitative research method was used in this research so as to investigate and observe the collected data with the help of statistical, mathematical and computational techniques.

3.7. Data Collection Tool: The research paper consists of primary research in order to find the data for the paper. A total of 100 respondents were selected. A structured questionnaire was designed with close ended and open-ended questions. It was designed in such a manner so that it caters all areas of study. Respondents were asked to fill up form related to their online purchase behaviour of food ordering and their frequency of the purchase. The data was analysed by simply entering the data into excel sheet where respondents answering the various options.

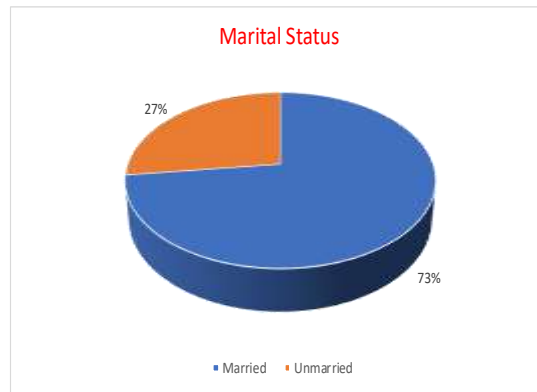
4. Data Interpretation and Data Analysis

The data was analysed using simple percentages of respondents answering the various options. The presentation was made with the help of tables and charts. Conclusions were drawn on the basis of findings related to observations after analysis of data.

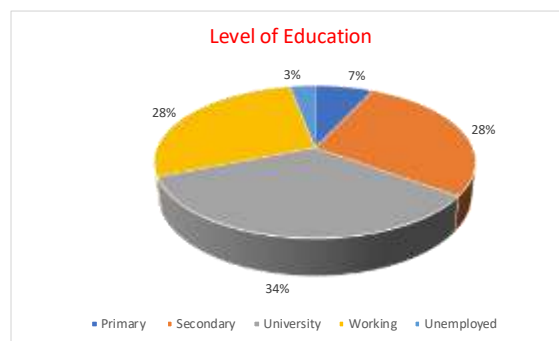
Pie-Chart 4.1



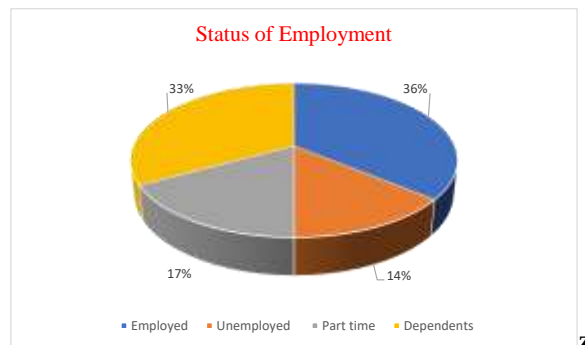
Pie-chart 4.1 shows the gender of the customers – Male (53%), Female (41%) and Others (6%) ordering food using digital platforms - Swiggy and Zomato.

Pie-Chart 4.2

Pie-chart 4.2 shows the marital status of customers – married (27%) and unmarried (73%)- ordering food using digital platforms- Swiggy and Zomato.

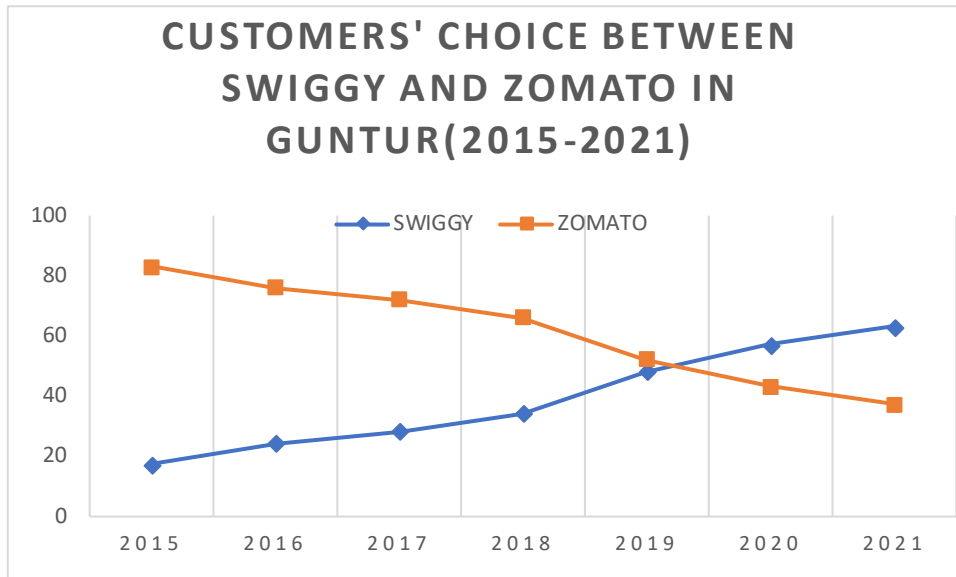
Pie-Chart 4.3

Pie-chart 4.3 presents the level of education of customers: Primary (3%), Secondary (28%), University (34%), Working (28%) and Unemployed (7%) using Swiggy and Zomato.

Pie-Chart 4.4

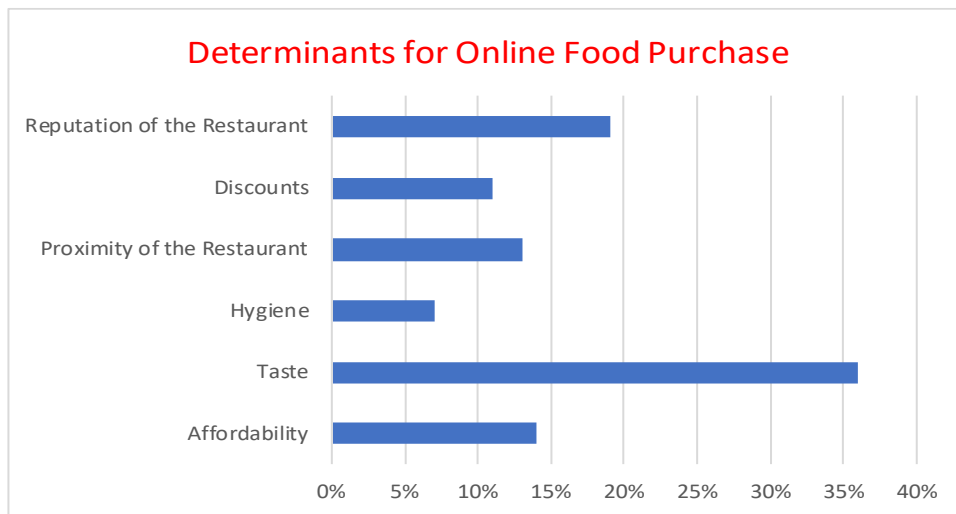
Pie- chart 4.4 presents the status of employment of the customers: Employed (36%), Unemployed (14%), Part time (17%) and Dependents (33%) using Swiggy and Zomato.

Line Chart



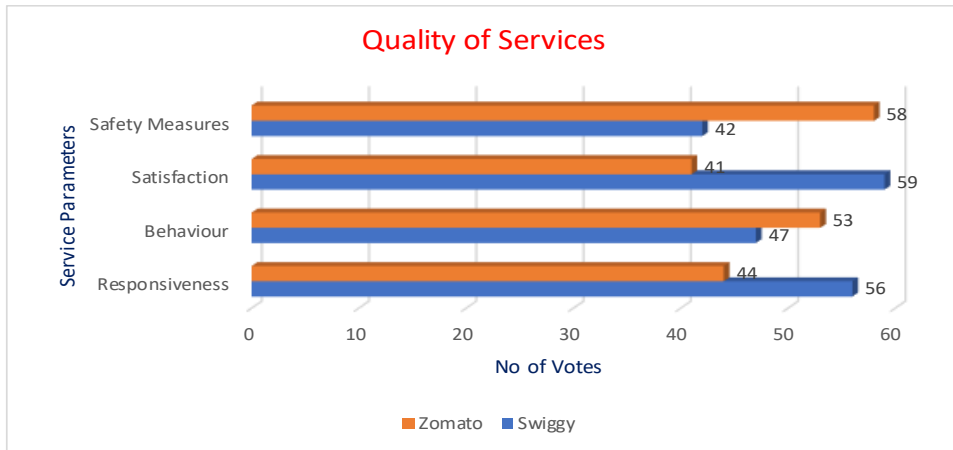
As shown in line chart, in 2015 Zomato was chosen the most over Swiggy by 66%. Since then, Zomato has shown a downward growth and Swiggy the opposite in terms of customers’ choice. Around the year 2019, both of them were positioned equally by the customers. Since then Swiggy has started outpacing Zomato and remained at 63% of customers’ choice in the year 2021 whereas Zomato stood at 37%

Line Chart



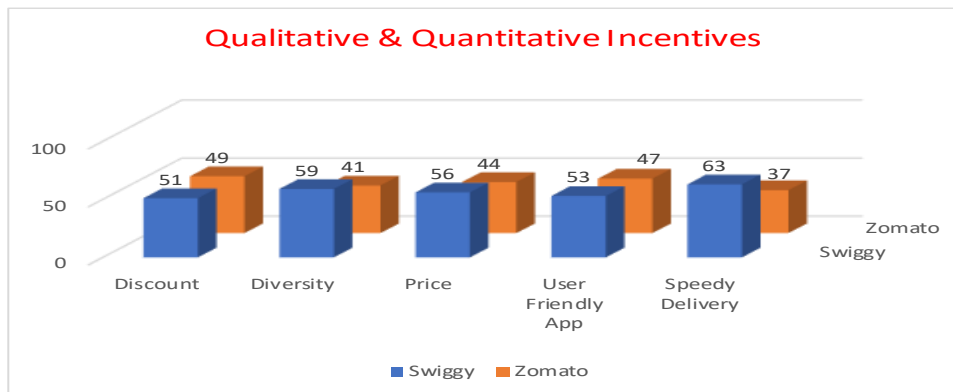
As shown in the bar graph- 4.1 “Determinants for Online Food Purchase”, taste remained the utmost priority of customers while ordering food standing at 36% followed by the reputation of restaurant which stood at 19%. Then came the affordability, discount and hygiene factors.

Bar Graph 4.2



As shown in bar graph V.2, the quality of services offered by Zomato and Swiggy were assessed under four parameters: safety measures, satisfaction, behaviour and responsiveness. Zomato fared well over Swiggy in the parameters of safety (58%) and behaviour (53%). Swiggy outperformed Zomato in the satisfaction (59%) and responsiveness (56%) parameters.

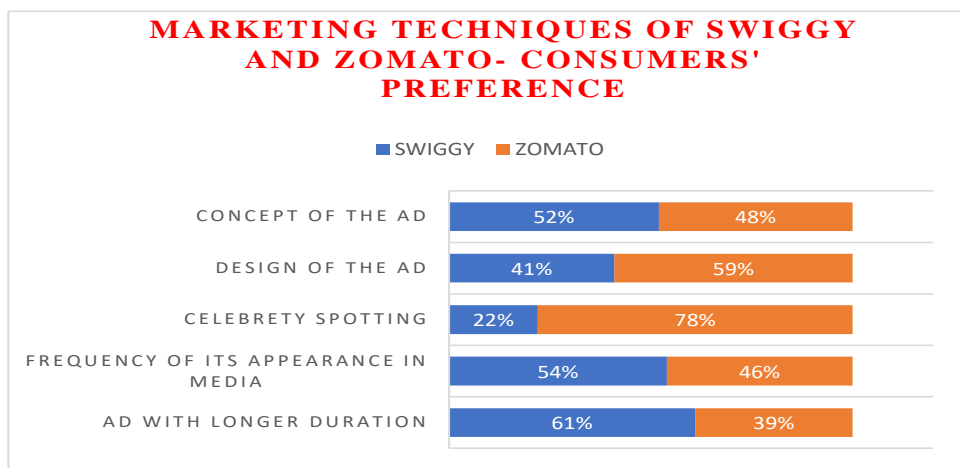
Bar Graph 4.3



As observed in the bar graph 4.3, the incentives offered by Swiggy and Zomato were assessed under two categories qualitative and quantitative. Swiggy fared well in the parameters; diversity, price, user friendliness of the app and speedy delivery.

Whereas in the parameter of discount both of them fared almost equally-Swiggy 51%, Zomato 49%.

Bar Graph 4.4



The bar graph records the responses of the customers of both Swiggy and Zomato regarding the platforms' marketing techniques which were assessed on the basis of five parameters- concept of the ad, design of the ad, spotting of celebrities, and frequency of its appearance in the media and the duration of the ad. The disparity between the two platforms is the most (56%) with respect to the parameter of celebrity spotting with Zomato actively including celebrities in its ad campaigns.

5. Testing of Hypothesis

H0. The null hypothesis is that the customers are happy with the consumer experience of the online food delivery app- Swiggy over that of Zomato in Guntur.

H1. The alternate hypothesis is that the customers are facing significant issues pertaining to the quality and diversity of services of Swiggy as well.

First, observing the bar graphs IV.2 and IV.3 carefully, some interesting observations can be made which will eventually help us to negate or not negate the null hypotheses. Zomato fared far better than Swiggy in terms of taking appropriate safety measures during the delivery process by a margin of 16%. It also fared slightly better than Zomato in its delivery behaviour. This is promising for Zomato especially in the tough times posed by Covid-19. However, we cannot undermine Swiggy's performance in the parameters of consumer satisfaction where it surpassed Zomato by a margin of 18% and the platform's overall responsiveness where it beat Zomato by a margin of 12%. They fared more or less the same around the mean value of 50 with an average variance of +3% or -3% in the parameters of discount, price and user friendliness of the app. These findings when coupled with the national market share of both the delivery platforms, some meaningful conclusions can be inferred. The strength of Swiggy lies in its logistics and larger tie-ups with restaurants. This helps it to provide services faster and address the inconvenience of the customer in a shorter span of time.

Next, when bar graph IV.4 is analysed, it was inferred that the marketing techniques of Swiggy and Zomato which play a major role in establishing supremacy in the minds of people. Advertising plays an important role in tuning the minds of people in choosing one brand over the other. Out of the five parameters, Zomato outperforms Swiggy in partnering with celebrities for ad campaigns and also in the aesthetics of the ad. Though, Swiggy performs better than Zomato in the remaining three there is no substantial evidence that this would give Swiggy an edge over Zomato in reaching to the larger masses.

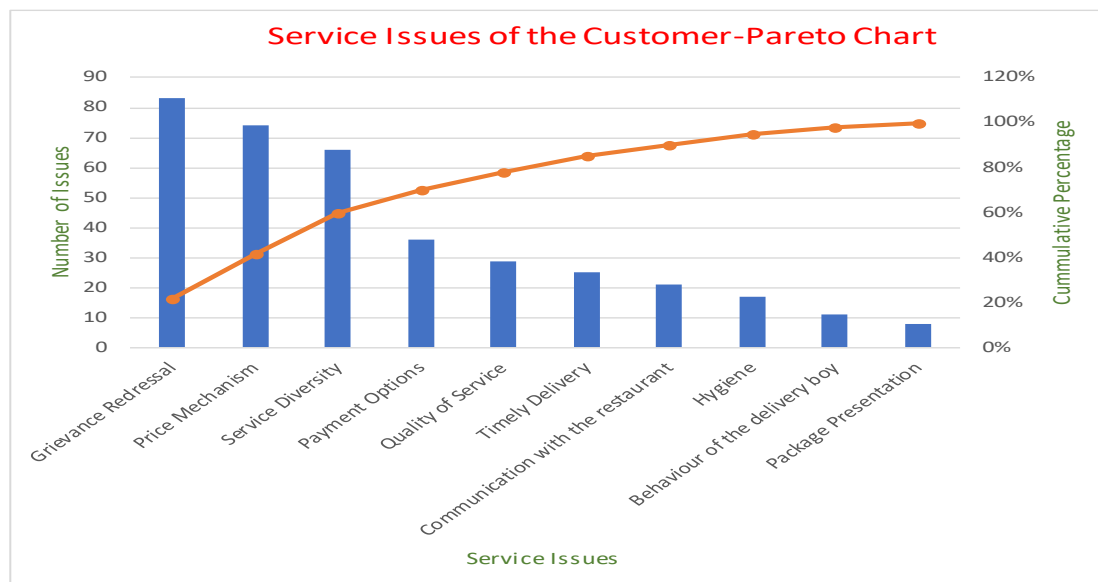
Hence, according to the statistics, Swiggy performed better than Zomato in quantitative parameters of logistical support, while Zomato marked its presence in the quality of services as it has wide variety of data regarding the information of various restaurants. So, with the help of alternate hypothesis it can be concluded that the null hypothesis is only partially true.

6. Findings

The following are the findings:

1. *The cut-throat competition between the two stakeholders, Swiggy and Zomato will take very keen turns as they battle tooth and nail to woo the customers* as evidenced in the kind of various strategies that the online food delivery platforms have adopted.
2. The line chart clearly brings out the journey of both the platforms poised towards equilibrium in Guntur.
3. With a constructive marketing strategy and a wholesome plan to expand and strengthen logistics, it does not take much time for either of the platforms to drastically outperform the other as at present both of them are valued more or less in a similar way by the consumer.

4. Some of the most important determinants that shape consumers choice in placing an online delivery include reputation of the restaurant, discounts provided, proximity of the restaurant, hygiene, taste and affordability.
5. Of all, taste is the most significant factor that determines the choice of the consumer. If these minute details are paid heed to, then the food delivery platforms can gradually start building a loyal consumer base.
6. Furthermore, the four pie charts bear out the fact that the gender, marital status, level of education and status of employment of the consumers do not have any prominence. However, these must not be brushed aside as superficial especially in places like Guntur that are transitioning into cities.
7. If a well-thought strategy to attract specific set of the consumers on different events across the year is put in action, it would be very helpful for the platforms to increase their revenue.
8. Creation of brand assumes pivotal role and hence, proactive and customer-centric approach would yield better results for both of them.
9. The customer-pareto chart brings out some of the cardinal issues pertaining to customers' attitude towards the service issues:



- a) Based on the survey conducted it was noticed that customers face certain issues regarding the services offered by Swiggy and Zomato in Guntur. The issues are pertaining to grievance redressal, price mechanism, service diversity, payment options, quality of service, timely delivery, communication with the restaurant, hygiene, behaviour of the delivery boy and package presentation.
- b) The issues were analysed with the help of a Pareto chart, an effective visualisation technique for decision making process by trouble shooting various problems. It highlights the most pressing issues among many that need to be fixed. In the pareto chart plotted, whoever among Swiggy and Zomato address the cumulative impact of the first four parametres namely grievance redressal, price mechanism, service diversity and payment options could retain their present customer base while actively attracting the potential future customers. Based on the above parameters the food platforms should devise a corrective and preventive action plan. However, it should be used along with other root causes analysis tools and to optimize the effectiveness of its plan of action.

- c) With rapid transition of the geographical limits and demographics of Guntur, Swiggy and Zomato have sped up the availability of services in the city. It can be noted that irrespective of all age groups barring children and the old the trend of ordering food online has gathered momentum. The online food delivery service providers in Guntur, Swiggy and Zomato have taken recourse to several means to comprehend the choices of customers and make all endeavours to woo them to their side.
 - d) The findings of this paper shed light on the symbiotic relationship between the weight of holistic consumer experience provided by online food delivery apps and the choices of consumers' who is prone to change his loyalty to another one if right kind of services are provided as specified or as predicted by the study. Many are tuning to online food delivery services as an easier and more convenient alternative given the dramatic changes in the life styles especially in cities like Guntur. Hence, the online food delivery platforms must leave no stone unturned to win over the trust and loyalty of the consumers.
10. Where the customer has some online presence that can be turned out to be lucrative the online food delivery startups should follow leveraging the technology and banking on new or emerging business platforms like cloud kitchen. However new be the technology or other innovative practices, the services should be qualitative based on goodwill.

7. Conclusion

To conclude, both Swiggy and Zomato are rightly poised to become market leaders and make more lucrative business if they address the problems. Since their fortunes, more or less, revolve round customers, they should evolve realistic approach to broaden their customer base and to keep them loyal to them. This may be possible if they devise ways and means to make their business more customer-centric with sincere endeavours.

7.1 Suggestions for Further Research:

The following studies may be carried out:

1. A comparative study between the customers of the neighboring city, Vijayawada and Guntur cities may be carried out with an approximate sample of 1000 in order to arrive at better understanding about ins and outs of customers' stance towards the apps. Certain other important variables like privacy and security, which have not been studied in the present paper, may be explored.
2. Over the years Zomato has diversified its operations whereas Swiggy confined its operations exclusively in the domain of food delivery. To arrive at comprehensive understanding about them, a study may be taken up to assess the stances of the other stakeholders, the delivery boys, managers, people belonging to restaurants and customers. In future, scholars while embarking upon research may take recourse to quantitative and qualitative data techniques while gathering data collection to secure comprehensive responses.

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