



A Deep Dive Analysis of Online Food Delivery with A 6 PS of the Digital Marketing Mix-Based Framework

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ABSTRACT

This paper presents a holistic analysis of OFD by utilizing the 6 Ps of the digital marketing mix to portray how each platform employs strategic marketing to drive sustainable growth. The article utilizes extensive reviews of previous literature, as well as up-to-date news and observations. It was found that each of the market players focused on the product by expanding from only OFD to become lifestyle-driven “everyday apps” by enhancing the UX/UI experiences of the application, which supported and coordinated profound experiences, personalized offerings, and precise data analytics. Price played a role but was not the primary focus since it is controlled by the government to protect consumers. It can be concluded that if an OFD platform would like to grow sustainably, it should place a strong emphasis on product service, quality, and user-friendly technology on the application. Most of the previous studies regarding online food delivery discuss factors in driving adoptions, consumer attitudes and satisfaction towards the application and OFD landscape. There are the gaps in the holistic analyses of OFD from the digital marketing mix framework. Therefore, this academic article is the first to focus on uncovering how each of the top three OFD players in Thailand adopted the digital marketing mix to optimize opportunity.

INTRODUCTION

Online food delivery (OFD) has become the fastest growing segment of consumer food business worldwide with, 20 percent compound annual growth rate from 2016–2021, compared to a declining trend in the dine-in segment (-5 percent) and the stagnated trend of total consumer food business (0 percent). (Passport by Euromonitor International, 2022) This is due to three primary reasons. Firstly, increased internet access, especially mobile internet, establishes a ubiquitous environment and renders the smartphone indispensable for consumers who adopted it as part of their daily lifestyles for e-shopping, as shown in the forecasted strong growth of global e-commerce market from \$3.53 trillion in 2019 to \$6.54 trillion by 2022. (Ali et al., 2020; Talukder et al. , 2022; Shankar et al., 2022) Secondly, urbanization and fast-paced consumer lifestyles allow less time for cooking or even dining out in a restaurant. (Talukder et al., 2022) Consumers must balance different parts of their lives, mostly work, personal life and family.

Online food delivery has been gaining popularity since it addresses the pain points of consumers who are looking for food service alternatives that can provide a variety of food choices and save time on travel and waiting on queue. As a result, online food delivery services provided convenience benefits to consumers, allowing them to order their favorite food via call center, website, and/or fingertip on the mobile application. (Roh & Park, 2019; Sobika & Raj, 2021; Shah et al., 2021) The mobile application is the most popular platform used to order food, which can be accomplished with a few simple steps: search for restaurants, pick the desired dishes, and confirm the delivery location (Shah et al., 2021). Apart from offering convenience, most food delivery service has also taken the service to the next level by adding a larger variety of food choices and food vendors/restaurants into their service platform.

(Cho et al., 2019; Roh & Park, 2019) Thirdly, during the spread of the COVID-19 pandemic, governments announced social distancing restrictions preventing people from dining in restaurants or with other people to comply with this policy. (Wen et al., 2021) This adversely affected hospitality and food service businesses. (Macias-Rendon et al., 2021; Gardan et al., 2021) To respond and survive under such government policies, most food vendors and restaurants initiated contactless food delivery to avoid the risk of getting and spreading viruses to customers, as well as to enhance food safety. (Sungboonlue et al.,2022; Rowland, 2022) Consumers who tend to have relatively higher incidence of ordering food delivery are millennials, adults living with children, as well as female adults, since such individuals must shuffle between work and personal/family responsibilities. (Ali et al., 2020; Senthil et al., 2020; Keeble et al., 2021; Hong et al., 2021)

Within Asia Pacific, Thailand is renowned as the kitchen of the world, given its abundant food supply and famous Asian food. Therefore, Thailand was selected as the focus for this article because food delivery has been booming in the Thai food market. Food delivery business in Thailand experienced impressive growth year on year from \$212 billion in 2018 to \$3,181 billion in 2021, or more than 1400 percent growth in three years. The emergence

of food delivery emerged to help consumers who live in urban areas to access to food and beverage under the constraints of congested traffic and busy lifestyles.

Food delivery is the key enabler for consumers who wish to eat their favorite foods without going to buy it or wait in long queues. By creating unique values for consumers, food delivery is one of the businesses growing against the trend of overall economic recession. In addition, the spread of COVID-19 accelerated the growth of online food delivery business, owing largely to the country's lockdown restrictions and work from home policies formulated by the government. (Sobika & Raj, 2021; Kasim & Rosli, 2022) This has transformed the dining patterns of people away from offline and toward online food delivery service. The food delivery platforms themselves also strived to upgrade service quality by adding more varieties of food choices, vendors, and number of delivery personnel. (SCB Economic Intelligence Center, 2021).

Most previous studies regarding online food delivery address: (1) factors driving adoptions, intentions and choices among online delivery platform (Ali et al., 2020; Shafiee & Wahab, 2021; Shah et al., 2021; Sobika & Raj, 2021; Wen et al., 2021; Kasim & Rosli, 2022; Park, 2022; Ambad et al., 2022); (2) consumer attitudes toward and satisfaction with performance and optimization of food delivery applications (Macias-Rendon et al., 2021; McCain et al., 2021; Gardan et al., 2021; Sungboonlue et al., 2022; Rowland, 2022; Michalikova et al., 2022); (3) the online food delivery landscape (Senthil et al., 2020; Keeble et al., 2021) However, a holistic analysis of online food delivery within the digital marketing perspective remains unaddressed. Hence, the aim of this article is to fill this gap by presenting key digital marketing perspectives of prominent online food delivery platforms in Thailand by leveraging the 6 Ps of the digital marketing mix. The following literature review will begin with the evolution of food delivery, food delivery platforms in Thailand, business models of food delivery, mobile applications, challenges, and the 6 Ps of digital marketing mix.

THEORETICAL REVIEW

Evolution of Food Delivery

Online food delivery refers to the method of ordering food from third-party intermediaries or restaurants via website, social media, or (mostly) mobile application to have food delivered to consumers' desired location, whether home, office, or another specific place. There are currently two main types of providers: large chain restaurants, such as McDonalds, Pizza Hut, KFC or Domino's Pizza; and independent third-party intermediaries like Foodpanda, Grab, and LINE MAN. (Ali et al., 2020; Shafiee, & Wahab, 2021; Ambad et al., 2022) The food delivery business in Thailand was established a long time ago, and since 2000, has evolved in three phases. (SCB Economic Intelligence Center, 2021) Food delivery 1.0, referred to as the "marketplace era" (2000–2009), involved food delivery providers serving in the role of middleman between food vendors and deliverers. The marketplace earned a fee from being the middleman. Customers mostly ordered through website or call centers of the food delivery providers, who passed on the orders to food vendors. The

vendors would then deliver food to customers themselves or through third party delivery vendors or riders.

Food delivery 2.0 upgraded the customer experience through development of mobile applications, which became the main channel for the customers to access and order food, with platform-owned delivery services able to cover food vendors incapable of delivering food themselves. This contributed to the expansion of the customer base for food delivery platforms, alongside the introduction of technology to improve efficiency of the service in terms of convenience and rapid delivery. During the 2.0 era, the food delivery business model changed by charging service fees as a margin from the food vendors who joined the application. Finally, food delivery 3.0 is the current evolutionary stage of food delivery. Platform owners enhanced service across the value chain with new initiatives such as cloud kitchen, platform-branded food, delivery of food ingredients, etc. Now, most applications have expanded their scope of service by adding more services, such as grocery shopping, delivery services, financial services, and travel services. Transforming into such “super applications” is the current trend of most leading delivery platforms, such as LINE MAN, Grab, and Robinhood. (SCB Economic Intelligence Center, 2021)

Food Delivery Platforms in Thailand

Food delivery business in Thailand is consolidated under a few large vendors. Such vendors may be referred to as third-party food delivery platforms, as they act as middlemen between customers and food vendors. (Roberts, 2020) However, larger restaurants like Pizza Hut, The Pizza Company, McDonalds, and Burger King may have their own proprietary applications. This third-party food delivery is the consolidator among smaller and medium restaurants. Another emerging trend is the “cloud kitchen,” a food vendor serving only delivery without a dine-in location. (Senthil et al., 2020) Given the popularity of third-party food delivery platforms on mobile applications, chain restaurants also enrolled themselves with third-party food delivery platforms to enhance their exposure to potential customers.

To understand the competitive landscape of food delivery platforms, the evolution of key players must be considered. The first in the Thai market was “Foodpanda,” which launched in 2012, followed by LINE MAN in 2017 operated by LINE, one of the most popular social media platforms in Asia. Grab, an operator of taxi services, launched Grab Food in 2018. (SCB Economic Intelligence Center, 2021) The fourth player, Gojek from Indonesia, came in 2019 and was later acquired by Air Asia in 2021. (SCB Economic Intelligence Center, 2021) The latest one is Robinhood owned by Siam Commercial Bank (“SCB”). Momentum Works reported the 2020 market share distribution of the food delivery market in Thailand as follows: Grab owns 50 percent of the marketshare; followed by Foodpanda with a 23 percent share; and LINE MAN with 20 percent marketshare. The key drivers for food delivery platforms to become top of mind for customers are quality of service, application functionality and performance, and quality of food. (McCain et al., 2021) Consumers perceive that all online food delivery vendors are indifferent, and

the only way to create sustainable differentiation is through service quality and user-friendly technology in addition to occasional discounts. (Kasim & Rosli, 2022)

Business Models of Food Delivery

Food delivery platforms use two main business models for revenue generation: a profit-sharing model and a transportation model. (SCB Economic Intelligence Center, 2021) Platforms that operate with a profit-sharing model will have agreements to share profits with food vendors, ranging from 10 to 35 percent of food sales, together with revenue from delivery fees, cooperative advertising fees, and revenue sharing of 10 to 15 percent from food deliverers. Food delivery platforms spend earned profits to invest in consumer communication and promotions, such as discounted food prices and free delivery. The second revenue stream model was introduced by Robinhood, the newcomer, who focused on medium-sized and small food vendors that may not join the other platforms due to an inability to share their thin profit margins. Robinhood earns revenue mainly from delivery fees without taking a stake of food sales. This is probably because Robinhood is owned by a bank that would like to gain access to small and medium-sized food vendors to offer financial products, such as loans and insurance, rather than profiting solely from the food delivery business.

Online Food Delivery Mobile Applications

Ever-increasing internet penetration access has facilitated the downloading and usage of food delivery mobile applications. Given that the smartphone is the 33rd organ of the Thai people, who revealed that they can't leave home without smartphone. (Trueid, 2021) Therefore, the owners mobile food applications have strived to be the best in featuring food assortments, restaurant offers, and garnering positive customer reviews. (Shah et al., 2021) Hence, mobile applications are the main media for building brand trust, bonding, and customer loyalty, and are prioritized more highly in doing so than other traditional media. (He et al., 2019; Ahn, 2021) The satisfaction of consumers toward food delivery applications is driven by usability, usefulness, and affinity, which are mostly reflected through post-purchase ratings and comments in the application. (Park, 2022; Lee, & Han, 2022).

This is mainly driven by the ease of using such technology, which utilizes simple but effective user interfaces that make ordering food online easier than before. (Ali et al., 2020; Hong et al., 2021) Therefore, the quality of information and user experience design positively influenced user satisfaction and loyalty. (Ahn, 2021; Pandey et al., 2021; Michalikova et al., 2022) The quality delivered by online food delivery can be divided into functional quality, including ease of use, application design, responsiveness, privacy, security, quality of information, and personalization, as well as technical quality, such as quality of food and quality of service. (Su et al., 2022) Furthermore, Bangkokians' behavioral intentions to order online food delivery are influenced by application performance, usage experience, such as browsing for food and restaurants, and overall ease of use. (Muangmee et al., 2021)

The Challenges of the Online Food Delivery Business

Given the dramatic growth in topline revenue, food delivery platforms have faced enormous challenges. Firstly, food delivery operators experienced profit loss due to continual expansion in services, human resources, aggressive promotions, as well as incentives to deliverers. Most deliverers work with multiple food delivery operators. In 2020, Grab earned topline revenue at \$218 million, while the business lost \$8.5 million on the bottom line. Foodpanda earned revenue at \$132 million, but lost \$108 million in profit. (Marketeeronline, 2022). Similar challenges were experienced in other countries like Malaysia. (Kasim & Rosli, 2022) Secondly, the regular emergence of newcomers in the food delivery business and expansion to upcountry urban areas to increase customer base, for example, Robinhood, Gojek, Shopee Food and True Food, pose challenges. This led to price competition among food delivery platforms to gain short-term orders.

Thirdly, food delivery platforms provided more value-added services to increase revenue, profits, and loyalty among existing customers. Such services can generate average per order spending two to three times higher than food delivery, alone, especially supermarket shopping services. This transforms food delivery applications into “everyday apps,” which consumers cannot live without. For example, Grab offers e-wallet, smart shopping assistant, on-demand delivery, taxi service, and travel booking service on top of food delivery. Meanwhile, LINE MAN provides e-wallet, loans, supermarket shopping, messenger service, and taxi service, as well as LINE social media and chat. Such transformations imply that food delivery platforms envision becoming super applications or everyday applications that add value to the everyday lives of their customers, thus preventing customers from turning to competitors that aggressively focus on discounted pricing. However, the new players also imitate the additional services offered by more mature players, rendering such additional services less of a competitive advantage.

The 6 Ps of Digital Marketing Mix

Most marketers are familiar with the classic theory of 4 Ps: product, price, place, promotion. As the market and consumers evolved and moved toward digital platforms, Frank Feather (2016) invented the 6 Ps of the digital marketing mix based on the flow of digital customer experience, applicable for digital products and service. The 6 Ps include product, price, place, precise, personalized, and profound. Product refers to tangible products or services that can create value for customers through mass customization built to different needs of the customers, while maintaining economy of scale through mass production. If the product is a service, it can be customized based on the consumer’s needs and interests in the form of content, delivery service, and software application. Price refers to the exchange of value between manufacturers and customers, and with online capabilities, price, together with products can be dynamic and adapted to different types of customers to meet affordability levels. This can be seen in price offers to different groups of consumers with different values. Place deals with omni channel options and

experiences that allow consumers to order in the ubiquitous environment of anywhere and anytime from websites, applications, and social media.

Precise involves utilization of big data derived from customer profiles and lifestyles to create positioning and targeted offers that can enhance customer loyalty. Personalized service is one of the unique capabilities of digital marketing to anticipate and design the customized products and experiences for the target consumer. Profound experience refers to the user interface and user experience when customers navigate on the digital channel platform, whether it's a website, mobile application, or social media interaction. The 6 Ps of the marketing mix is a theoretical framework that can be used to analyze digital products and add more value with optimized solutions to upgrade customer experiences to increase usage and loyalty. Therefore, the 6 Ps of the digital marketing mix will be used to uncover different aspects of online food delivery in Thailand among key dominant players from the perspective of the writer. We then can examine how online food delivery can be improved in the future to meet up and coming demands of the customer in a fast-paced, changing environment.

METHODOLOGY

This academic article is derived from a review of global statistics, literature, news articles, observations, and analysis under the 6 Ps of the digital marketing mix to present a holistic perspective of online food delivery in Thailand, which can be replicated in other markets and regions in the future.

RESULTS

Each major online food delivery player has a substantial customer base acquired since the launch of its platform. Foodpanda is leading with 7 million people, followed by Grab with 2 million people, and LINE MAN with 1.5 million people. (The Standard, 2020) While there are considerable differences in the size of customer bases between Foodpanda and the other two players, active customers and spending per order must be considered. This is due to the fact that one customer may install more than one application, and the purchase is likely driven by variety of restaurants and discount offers. (Kasim & Rosli, 2022) Given that it is becoming more difficult to acquire a high-quality potential customers, online food delivery services must maximize their marketing mixes to attract the right target group and also retain good quality customers by encouraging them to spend more with the application by offering enough online services to become an everyday app. (Bluebik, 2022) Therefore, the emerging game-changing strategy is to move from being a specialized food delivery platform to becoming an all-in-one application that serves the needs of customers for courier, delivery, shopping, taxi, and financial services.

However, this movement depends upon the capacity of the existing infrastructure and ecosystem of each platform. For example, LINE MAN is an affiliate of LINE, the most popular conversational social media application, which can transfer its customer base from LINE to LINE MAN, LINE TV (online TV), LINE Pay (e-wallet), etc. Meanwhile, Grab started from a taxi service and can garner its customer base from its passengers. On the the other

hand, Foodpanda, which began with online food delivery without other services, may find it difficult to increase customer spending and interaction within its ecosystem. Therefore, this paper shall investigate each of the 6 Ps of online food delivery platforms to analyze what they have achieved and must do to continue to expand and meet the ever-changing needs of the consumers in the next stage of growth.

Product

The current big three online food delivery platforms have different strategic directions in terms of geographic expansion, restaurant coverage and rider service. Foodpanda, the first to market in Thailand, offers nationwide coverage with 100,000 restaurants on the application and a maximum of 60,000 riders. Foodpanda employed a mass marketing strategy and focused on maximum nationwide coverage, but the selection and variety of restaurants are limited to medium to large-sized businesses because it relies on collected entrance fees and monthly fees from member restaurants, while other platforms waived such fees to increase their restaurant coverage. (Makro Horeca Academy, 2021) LINE MAN covers 14 provinces in Thailand, with 500,000 restaurants and 60,000 riders. It is now undergoing transformation into a super app with additional services such as LINE CHAT, LINE TV (online TV), LINE PAY (E-wallet), LINE TODAY (News bulletin), LINE BK (Financial Loan Service), LINE Shopping (E-Commerce), etc. (Bluebik, 2022).

This demonstrates that LINE expanded its business by tapping on different aspects of Generation Y consumer lifestyles and emphasized its online environment as the key aspect for driving customer usage. Grab, the market leader in online food delivery, has approximately half of the coverage of Foodpanda but double the the number of customers. (The Standard, 2020) Thanks to its online taxi calling business, Grab has the legacy expertise in courier and delivery by utilizing innovation. (Thammasarn, 2021) Grab was the first to announce its transformation to 10 percent electric vehicle usage by 2026. (Brand Buffet, 2022) This indicates that becoming a super app is the trend toward which each player is trying to move, but the elements of the services offered must be thoroughly considered and balanced, based on the strengths and heritage of each platform, as well as target consumers' needs and lifestyles. Technology is one of the key enablers for upgrading consumer experiences to the next level, while new technologies emerge and disrupt one another. Therefore, platforms will have to pick and choose the technologies that can bring about sustainability for business and society as a whole.

Pricing

Pricing sets the expectations in consumers' minds. If consumers perceive that the value they received is far beyond the price they paid, they will be satisfied and continue to be loyal to the platform. Pricing among the three platforms does not differ greatly. The average price starts from 10 to 15 baht for one to five kilometers. (Prachachat, 2021) Delivery pricing is similar because consumers tend to compare the delivery charge across different applications before ordering. This is driven mainly by the government policies during the

COVID-19 pandemic that platforms must declare every cost incurred in food delivery and could not over charge on the price since food delivery was considered an essential service during the pandemic. (Prachachat, 2022) This means that the upper ceiling of the price is controlled by the government. Thus, the only special advantage that would encourage the customers to order is when the application or restaurants offer free delivery within a certain distance and absorb the cost. The delivery price is not the key point of differentiation because pricing is similar across platforms, and if any player attempted to use it as a loss leader, the others would follow. Therefore, it would not be differentiated and sustainable. Another trend is the evolving cashless society, which means that most e-wallet and internet banking are accepted as forms of payment, in addition to cash and credit/debit card. This drove some of the player to launch their e-wallet services, like LINE PAY to serve its online food delivery and LINE Shopping (e-commerce shopping).

Place

Place is where consumers get to know and begin interaction with online food delivery. Since this occurs on the online platforms, they mostly rely on the most popular channel, like websites and mobile applications. Mobile applications are becoming more popular than websites, since mobile phones account for more than 60 percent of the share of internet used by Thai consumers. (We Are Social, 2022) The consumer groups mainly ordering online food delivery are Generation Y (51.09 percent), followed by Generation X, Baby Boomers, and Generation Z; and the key reasons for ordering online are: (1) Consumers do not want to go to sit in a restaurant (80.37 percent); (2) They don't want to wait in long queues to get into a restaurant (57.63 percent); and (3) There are variety of offers and discounts on online delivery platforms. Mostly, online food delivery is ordered during lunch time, followed by dinner, and afternoon snacks. The most popular channel for ordering is the mobile application (88.47 percent), followed by website and direct message in social media platform. (Electronic Transactions Development Agency, 2020) This information shows that mobile applications are the main online channel used by online food delivery customers and serve as the place to create first impression and increase customer loyalty. Therefore, an application is built to serve the customer, as well as for brand building purposes. (He, Han, Cheng, Fan, & Dong, 2019; Ahn, 2021) Each platform tends to update the user interface and user experiences with friendly graphics and animation to provide seamless online services to the customer. If something wrong happens, the customer can contact a help desk at any time via the application.

Precise

Precise refers to the leverage of big data from customers to drive differentiated positioning and loyalty programs. This is unique to the digital marketing mix since applications can track interactions and usage of the customers by order, by day, or even by meals. This has been implemented by all of the top three players in the forms of loyalty program. Grab is the leader in creating a loyalty program where customers are identified based on their

spending to become silver, gold or platinum members in order to receive special privileges based on their membership tier. The points collected can be redeemed for free meals or discount vouchers for the next purchase. Grab shares a network with Central Department Store, one of the largest shopping malls, Agoda, Booking.com, as well as Ikea, to provide special discounts when Grab customers use points to redeem. (Promotions, 2020) Grab rewards can be collected across all Grab ecosystems; Grab Taxi, Grab Bike, GrabFood, etc. In addition to its member tier program, Grab also has a subscription package where customers can pay a fixed amount of money monthly to enjoy discounts and free delivery. LINE MAN does not have a similar loyalty program but, rather, focuses on offering special subscription packages for different types of customers. For example, customers can buy a package at 250 THB (\$7.50) to get a 50 percent discount on food prices on three orders. Further, LINE MAN acts as a middleman so customers can collect points from their favorite restaurants and cafés by ordering through the LINE MAN application. (Manager Online, 2020). Foodpanda doesn't have a points collection program but encourages customers to apply as a pro-member to enjoy special privileges to enjoy free delivery, 50 percent off food prices, and other special deals with limited times per month. This shows that Grab leveraged the big data to engage customers with different privileges for each member tier and sell subscription packages to meet the needs of the customers. This tends to explain why Grab retains its leadership position within the highly competitive market.

Personalized

Personalization is one of the unique qualities that online food delivery can offer to serve the different needs of the customers, by leveraging past consumer behavioral data and geolocations. Platforms employ similar strategies on location-based offers for the restaurants near the customer location, restaurants with special flash discounts on certain times of the day, favorite restaurants from which customers ordered in the past or have repeatedly ordered from, as well as new restaurants matched with the dining taste of the customer. For example, Grab, LINE MAN, Foodpanda will populate restaurants near the location of the customer, both old and new. Grab has a special tab called "What should I eat today" to recommend the type of restaurants that customers may like based on their previous orders. LINE MAN promoted trending restaurants based on customers' locations. These are evident in the application of the 3 platforms. They tend to do well in personalizing food offers based on consumer preferences, since different customers will see different restaurants based on their location and preferences. However, improvement could be made if platforms could personalize according to the mealtime of the day from morning, lunch, dinner, and snacks to offer suitable food choices to match the mealtime. This would be something that may impress customers by predicting the fare they desire for each meal.

Profound

Profound experience involves all the experiences of customers with the platform, through websites or mobile application. The top three online delivery

applications for user friendliness are Grab, Foodpanda and LINE MAN. (Mybest, 2022) There are five simple steps shared across these three platforms: (1) pick delivery location; (2) choose restaurant; (3) pick the menu; (4) confirm order; and (5) follow up delivery journey on app. The key factors affecting the user experiences are usability, usefulness, and affinity. (Park, 2022) The key target customers are main Generation Y, who are very tech-savvy and have to balance between personal life and work. The key benefits that the Thai Generation are looking for can be categorized into must-have benefits, which include a stable food ordering system. Performance benefit refers to delivery time, number of restaurants, food price and payment options, and delighter benefits are reviews and nearby restaurant recommendation. (Sungboonlue et al., 2022) However, in order to listen to the voice of the customers, each platform must regularly monitor the review through social media and in their own applications to understand what they can enhance from good to great, since customers' needs are ever changing and dynamic, meaning that what satisfies the customer today may not be good enough for tomorrow. The key analysis points of the three online delivery platforms are summarized on the table 1 below.

Table 1. 6 Ps Synthesis Summary of Three Online Food Delivery Players

6 Ps	Grab	LINE MAN	Foodpanda
# of customers base	2 million people	1.5 million people	7 million people
Product	-32 provinces coverage -200,000 restaurants -100,000 riders - Super Apps	-14 provinces coverage -500,000 restaurants -60,000 riders Super Apps	-Nationwide coverage - 100,000 restaurants - more than 50,000-60,000 riders - Food & Mart delivery
Price	-15 THB for the first 5 kms - Cash, E-wallet, Credit/Debit card	- Free for the first 1 kms and then charged with 10-15 THB - Cash, E-wallet, Credit/Debit card	-10 THB for the first 1 kms - Cash, E-wallet, Credit/Debit Card
Place	- Website, Mobile Application	Only Mobile Application	- Website, Mobile Application
Precise	- Loyalty program (Silver, Gold, Platinum) - Subscription Package	-Subscription Package	-Subscription Package for Pro account
Personalized	-Location-based, favorite food and special deals	-Location-based, favorite food and special deals	-Location-based, favorite food and special deals offers

	offers	offers	
Profound	5 steps: pick delivery location, choose restaurant, pick the menu, confirm order, follow up delivery journey on app	5 steps: pick delivery location, choose restaurant, pick the menu, confirm order, follow up delivery journey on app	5 steps: pick delivery location, choose restaurant, pick the menu, confirm order, follow up delivery journey on app

DISCUSSIONS

Online food delivery has received tremendous attention from both business and academics due to its impressive growth over the last five years, driven by upgrading technology, consumer lifestyles, and the COVID-19 pandemic. Most past studies focused on specific domains; factors in driving adoptions, consumer attitudes and satisfaction, and online food delivery landscape. However, a holistic view of online food delivery within the digital marketing perspective has not been offered. This paper synthesizes the online food delivery business in Thailand within the framework of the 6 Ps of digital marketing mixes from different sources to portray how each of the key players drives online food delivery adoption and usage in Thailand. The 6 Ps of digital marketing mixes includes product, price, place, precise, personalized, and profound. This framework considered both the quality and quantity that each application offers to the target consumer. It was found that product is still one of the main focuses for online food delivery where each player continued to enhance features and benefits to become a lifestyle-driven everyday app for consumers, in order to increase spending and maintain customer loyalty. This observation is also consistent with the research conducted by Kasim and Rosli (2022), who mentioned that the online delivery platform can create sustainable growth through product quality and technology that meets the need of the customer.

Place plays a crucial role in brand building and bonding creation with the customer, since place is the application where consumers interact with the brand, which is consistent with the studies by He et al. (2019) and Ahn (2021). Place must be supported and coordinated well with profound, personalized, and precise. Profound can create a good first impression and daily satisfaction for the customer because seamless and friendly UX/UI experiences tend to make the consumer want to return to the application. Personalized experiences are another step from profound, in the use of big data to predict what could interest customers and to offer them the right choices of restaurants and meals. This, in turn, can increase customer spending. Precise is related to personalized on how big data can be used to increase customer loyalty and positioning, where each platform may offer different forms of loyalty programs, whether it is a membership tier or subscription program. This reinforces stronger relationships between customers and the platform, as well as the brand itself. Price, especially delivery fees, is controlled by the government, and customers

mostly compare the delivery price across applications before submitting an order. Therefore, most applications tend to offer occasional free or discounted delivery pricing to incentivize new customers or reward existing users as part of their loyalty programs.

CONCLUSIONS AND RECOMMENDATIONS

Given the emphasis of online food delivery platforms on product and place, the key focus for online delivery platforms should be product and place, selectively coordinated with profound, personalized, and precise based on customer requirements, which can be accomplished accordingly:

1. As far as product is concerned, being a lifestyle-driven everyday app means different things for different customers. Platforms will have to understand deeply what the current daily challenges of the target group are, for example, taxi calling, grocery shopping, laundry, home cleaning, courier, gift purchase, party arrangement, e-wallet, financial loan, entertainment, and health-related advice, etc. This can be done through concept testing with prospective customers or soft launching of services with a small selection of customers to get feedback and respond.
2. Digital place or application/website is the window of transaction and communication with the customer. The application will need to evolve by predicting customers' requirements through big data and through conversations with customers. Profound, Personalized, and Precise can be chosen to focus selectively. For example, meal alerts and meal plans for the week can be incorporated to support customers who are busy with work and do not have time to think of meals, especially for health-related consumers who are concerned about the food quality and specifications. This will upgrade positioning of the platform in the customer's mind from mere online food delivery to being a food caregiver or a "foodie" expert.

FURTHER STUDY

This academic article sheds light on online food delivery platforms with the 6 Ps of the digital marketing mix. There are further opportunities to fill gaps in the holistic view of online food delivery by investigating the key marketing mix and other important factors that have an impact on consumer adoption, usage, and loyalty through structural equation modeling analysis to understand the indicators and factors, as well as the paths to building successful and sustainable online food delivery businesses.

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