Customers' Expectations and Satisfaction with Online Food Ordering Portals

** Ramesh Kumar Bagla*
*** Jasmine Khan*

Abstract

Purpose : This paper investigated the factors that are responsible for the growing popularity of online booking and ordering of food in India, expectations of the users, and their satisfaction levels with the popular apps such as Foodpanda, Swiggy, and Zomato.

Methodology : Descriptive research was undertaken on the basis of primary data collected from the respondents residing in National Capital Region of Delhi chosen through non – probability convenience sampling using a structured questionnaire. The collected data were converted into data matrix using SPSS 23.0 software and inferential analysis was done.

Findings : Factors contributing to the popularity of online food ordering were found to be : lack of time to prepare food, availability of variety, rewards and cashbacks. There is a scope for improving the users' satisfaction levels by understanding their expectations more precisely and offering more attractive options while ordering food online.

Research Limitations/Implications : The study was limited to a specified geographical area of National Capital Region of Delhi for chosen factors considered by customers while ordering food online conducted at a particular stage of evolution of the online food industry.

Originality/Value : The paper offered fresh insights into customers' expectations and the relative importance of the factors considered by them while ordering food online. The findings of this research can be used by online food portals for bridging the gaps between customer expectations and their satisfaction level to ensure sustainability of this innovation.

Keywords : **online food ordering, food ordering apps, restaurant search service, rewards and cashbacks**

JEL Classification : L100, L810, M310

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The food technology industry has seen a rapid transition from being perceived as a mere technology that was focused on preservation, processing, and manufacturing of food items to now becoming delivery and aggregation online. Availability of online platforms and the recent boom in e-commerce has made everything readily available anytime, anywhere. Online food ordering is the process of ordering food from a local restaurant through a web page or mobile application (app). Similar to ordering consumer goods online, many of these apps allow the customers to sign up and create accounts with them in order to make frequent ordering

* *Professor,* Amity Business School, Amity University, Sector 125, Noida - 201 313, Uttar Pradesh.
E-mail: rbagla@amity.edu
** *Academic Writer,* Paperpedia Pvt. Ltd., B - 78 Sector 27, Noida - 201 313, Uttar Pradesh.
E-mail: jasminekhan.193137@gmail.com

convenient. The process includes searching for a favorite restaurant, which is filtered by selecting types of cuisines, then choosing the delivery or pick-up option. Payment can be made either by a digital device or cash. The restaurant gives a percentage of the order value to the online food company. Online food ordering portals offer a wide variety of food choices, ratings and reviews, and a more efficient handling of the order. People would earlier search for the best places to eat by reading restaurant reviews in food guides and magazines, which have been replaced by online platforms, enabling the customers to take informed decisions in a jiffy.

The tech-savvy generation has welcomed these emerging online food portals. Growth in takeaway food and delivery market is fast, with online ordering growing much faster, facilitated by the adoption of e-commerce and increased smartphones/tablet penetration. Consumers are looking at digitization, not just in terms of menus, but also for discovering food. There is also a drive towards building up innovative delivery models and packaging options, along with a social network for tracking the rating and reviews.

The food tech industry not only comprises of online food ordering and delivery apps, but also includes apps for delivery aggregators, rating and review of restaurants, table reservation, and deals & offers (Figure 1).

Figure 1. Categories of Food Tech Apps

The concept of ordering food online is gaining mass popularity due to the convenience that is being provided by the companies in terms of doorstep delivery of food to the customer, various options of alternate payment methods and lucrative discounts, reward points, and cash back. An overview of food-tech industry in India shows that on an average, 0.5-1 million orders are received per day over phone and only 1% of the market has moved to apps (Singh, 2016). The top 25 cities in India have around 75,000 restaurants, including organized chains and standalone restaurants. Dominos alone does 1.8 lakhs to 2 lakhs orders a day and has build a ₹ 1,800 crore business in India. Swiggy, which recently raised a fresh round of funding, does about 15,000 orders a day and Zomato does 13,000 (Singh, 2016).

Surging disposable incomes, growing Internet users, and rising sales of smartphones are some of the major factors that can be attributed to the growth of food-tech market in India. College students, working couples, and office goers are the key target audience for food-tech companies.

The Boston Consulting Group has forecasted that the market size of food industry in India is expected to reach INR 42 lakh crore by 2020, from INR 23 lakh crore in 2014 ("India's food market size to reach ₹ 42 lakh crore by 2020, says Boston Consulting Group, 2015). According to Rai (2016c), more than 400 food delivery apps have cropped up in India in the past three years that raised approximately INR 800 crores. However, the food delivery business is still at a nascent stage. A recently published report by Tech - Sci Research (2016) stated that with high demand for food and consistently growing customer base in the country, the growth associated with this market is expected to be highly attractive.

The Present Scenario

The present scenario of this highly promising industry does not look as rosy as it has been painted in many

forecasts and estimates. Despite a huge potential of the food tech sector, many players that jumped into the fray have either downsized like Zomato or completely shut down like Dazo and Spoonjoy. At present, out of the 105 food tech startups in India, only 58 are operational. Initially, the food tech industry in India began with companies like Zomato trying to solve the problem of finding a good restaurant through a simple user friendly platform. The next stage saw companies like Foodpanda trying to address the issue of order booking on these restaurants by working as an aggregator. The next stage had players like Swiggy tackling the issue of delivery in the value chain. Essentially, this sums up the evolution of the Indian food tech industry so far.

Unfortunately, not many food tech startups have touched upon the top and the most important part of the value chain, which is "food" itself. One of the important reasons behind the shutdown of many food tech startups is that the new entrants are mere clones of one another without any focus on the food. The popular business models in the food tech space are: on-demand delivery, restaurant and food discovery, concierge, kitchen cloud, full stack, thin layer, market place, and home cooked food models.

The most valued, unexplored, and toughest model is the 'Home cooked food' model. This model has the greatest potential, and innovation can spin off this industry in a new direction. Companies that can possibly work on coming up with creating classic food in unexpected and non-traditional ways are bound to score big.

Going by the performance so far, the following 10 Indian food tech companies look promising:

(1) Food Panda : It is India' s most popular food tech startup. They have a strong national presence, tying up with over 2000 food vendors, including key partners such as Wendy's, Burger King, Subway, Biryani Blues, Southy to name a few (Reviews XP, 2017). They have an extensive range of global and national cuisines in their menu. They have an efficient operational process and use proprietary technology to track food order delivery till customer's door. They also offer regular discounts of 30 – 50% and timely service with their recently launched "Express Guarantee" service (Reviews XP, 2017).

(2) Zomato : It is one of India's leading food tech companies along with Foodpanda and Swiggy. It has over 42,000 restaurants listed across all the major cities in India, and it also operates in over 23 countries (Reviews XP, 2017). It has grown substantially over the years, breaking even in several big markets. If indeed it lives up to its promise, Zomato will be the first Indian food tech company to become profitable (Rai, 2016a). Their strategy is to be content driven with very low customer acquisition cost, and a bulk of their revenues comes from advertising.

(3) Swiggy : They are functional in eight cities in India with over 9000 restaurants under its wings, having their own delivery personnel (Reviews XP, 2017). The customer gets timely deliveries and real time tracking of their orders booked via their app without any extra charge (Swiggy, 2017). Swiggy does not have a minimum order policy, accepting online payments for every restaurant they are tied up with.

(4) Faasos : Faasos has its presence in over 15 major cities across India. A perfect example of an offline chain that went online, Faasos have their own kitchen with expert chefs (Reviews XP, 2017). Customers have the flexible option of getting picked up for eating in house or delivery. Apart from its own app, Faasos also has a very strong social media presence (Tewari, 2015).

(5) Freshmenu : Freshmenu operates in Bangalore, Mumbai, Delhi, and Gurgaon. It has focus on delivered food, cleverly understanding the difference between food for delivery and the food ordered at a restaurant from the style of cooking to its packaging and serving (Bhattacharjee, 2016). Their efficient team of 500 employees operates their own 30 kitchens, who cook food in-house and have their own delivery team (Reviews XP, 2017).

In addition to the above five major players, Box8, Cookaroo, Holachef, Yumist, Cookgourmet, Inner Chef, and Twigly also look promising because of their innovative approach and catering to a niche clientele (Reviews XP, 2017).

The food tech industry saw low investor sentiment as approximately USD 80 million was raised in 2016 as compared to USD 500 million in 2015. However, in spite of low investor sentiment and some companies scaling down their operations, the online food tech industry of India grew at 150% in 2016, with an estimated gross merchandise value (GMV) of USD 300 million. The share of food tech companies in the business of restaurants is approximately 30 - 35%.

Literature Review

Though there are numerous studies available on customer satisfaction from online shopping, but not much literature is available on online food ordering. A study of the research work available in this area endorses the view that ordering food online is going to play a major role in changing eating and dining habits of customers and will play a major role in acquiring customers and ensuring their retention by increasing customer satisfaction and loyalty. The analysis of existing literature brings out the following salient features :

(1) Assurance & Service Quality as Major Attributes of Customer Satisfaction in Dining : Customer service is the key differentiator between the virtual and physical world. A study revealed that the dining experience attributes (food quality, service quality, and physical environment) positively influenced customer satisfaction (Canny, 2014). Service quality was found to be the most important factor in dining experience that affected customer satisfaction (Donkoh, Quaioo, Cudjoe, & Kaba, 2012). The online food based companies should revisit their strategies in order to create value for their customers rather than just spending the funding on customer acquisition and not on customer retention (Bajaj & Mehendale, 2016).

(2) Word of Mouth Responsible for Customer Acquisition and Retention: The decision of ordering food online is largely influenced by the opinions of friends, family, and discussions on online forums. A good word of mouth and experience by existing customers and online forum discussions largely decide the success of any web-based food shopping (Sethu, 2016). Service quality and satisfaction affect customer's likelihood to recommend (Huam, Min, Ai-Chin, Rasli, & Hamid, 2011).

In lesser competitive markets, where there are few substitutes, it is quite easy to retain customers (Best, 2005). This is quite true in case of dining out in a restaurant where a customer is a regular diner because no other fine-dine restaurant is available nearby. However, on the contrary, online customers quickly switch to competitors in case of dissatisfaction. Thus, customer loyalty is very important to build a successful customer relationship in online food ordering (Nigel & Jim, 2006).

(3) Importance of Offers and Discounts : Customers order food from apps and websites on the basis of factors like offers and discounts, variety of options in the menu available, free home delivery, app-user friendliness, and cash payment option (SathiyaRaj, Santosh, & Subramani, 2015). Customer loyalty can be built when the online business focuses on providing exceptional customer service that helps in retaining customers. For example, online businesses offer special discounts, promotional offers, and exclusive service for the customers who have a regular shopping account with them (Carroll & Broadhead, 2001).

(4) Consumer Behavior and Personal Characteristics : Since there is no face to face interaction in an online business, it becomes more important to understand key features of consumer behavior. Characteristics of a person

constitute an important factor affecting the purchase decision process. Personal factors include age, gender, occupation, income, status, education, lifestyle, etc. In online shopping, most of the studies are conducted on young adults because of their familiarity with the Internet (Lester, Forman, & Loyd, 2008). Young adults are helpful in predicting the future consumer behavior easily (Kau, Tang, & Ghose, 2003). Consumers try to find out what they like or not in respect to a particular situation. The preferences are affected by their choices and consider their last experience (Wu & Morrisson, 2000). Consumers, who are accustomed to online shopping through apps or websites, with maximum convenience and transparency, increasingly expect the same experience when it comes to ordering dinner. Well-designed self-service ordering systems give customers substantial control over the pace of their transactions and allow them to limit the amount of personal interactions they experience. Customers who evaluate service quality based on interaction with employees would not want to use self-service ordering. Similarly, customers who are uncomfortable with technology may be reluctant to try an electronic self-service site because they may be afraid of getting tangled up in the technology.

(5) Impact of Smartphones for Restaurant - Based Business : It is expected to become innovative and implement unique services that add value for restaurant business when ordering can be done through smartphone apps, particularly for delivery and take-away services (Rinanda, n.d.). Smartphone enabled app-based food-tech adds more value for businesses as it helps in service improvement through review and feedback, faster accessibility, reduced error that the waiter might make. It also gives an opportunity for businesses to sustain and compete by analyzing the trend. People used to online ordering have been pleased with the technology and all indicated that online ordering met or exceeded their expectations.

An automated food-ordering system with real-time customer feedback is preferred where the system is convenient, effective, and easy that improves the performance of restaurant's staff (Tanpure, Shidankar, & Joshi, 2013). E-retailing reached the customers all across the world, it even attracted retailers positively towards rural India (Prakasha, 2014). Only innovative business models and creative marketing efforts will help these food-tech startups survive the test of time (Paul, 2015).

Objectives of the study

- To find out the most preferred platforms used for online ordering of food by the customers.
- To find out the customers' most preferred web/app based portals used to order food.
- To find out the relative importance of the factors considered while ordering food through online ordering portals/apps.
- To identify the difference between customers' expectations and satisfaction levels while ordering food through online portals/apps.

Research Methodology

The research follows exploratory and descriptive research methodology to find an answer to the research question pertaining to the gaps between customers' expectations and their satisfaction level with online food ordering portals in India. The construct for the study was developed using a 5 - point Likert scale, where 1 signifies the *lowest level of satisfaction* and 5 signifies the *highest level of satisfaction*. The research instrument, a structured disguised questionnaire, for the above construct was designed using eight variables, which were tested for reliability through a pilot survey in which responses were collected from 50 respondents (Cronbach's alpha value: 0.752). Primary data were collected from a sample of 250 respondents chosen through non-probability sampling

from a defined target population in the geographical spread of National Capital Region of Delhi. The respondents were between 18 and 60 years of age and consisted of 51.3% men and 48.7% women. Education wise distribution of the respondents was: 3.33% undergraduates, 33.33% graduates, and 63.34% post graduates. Secondary data were collected from research journals, reports, white papers, and cases previously published on the topic. The collected data were converted into data matrix using SPSS 23.0 software and inferential analysis was employed to test various hypotheses at the 5% level of significance, which included *t*- test, chi-square test, and Pearson's correlation.

Analysis and Results

It can be inferred from the data analysis that the most preferred platform used by the customers to order food online is mobile phone (87%) (Figure 2). The most popular web/app based food ordering/delivery services are : FoodPanda, Zomato, and Swiggy in that order (Figure 3). There is a gap between the expectation and satisfaction level of the customers who ordered food online through web/app based portals in the area of taste, offers/discounts/coupons, hygiene & freshness of food, and on-time time delivery (Figure 4). The most important reason that is responsible for the growing popularity of ordering food through online portals is "Lack of time to prepare food" followed by "experience variety without going to restaurants" (Figure 5).

Figure 2. Device Most Frequently Used for Ordering Food Online

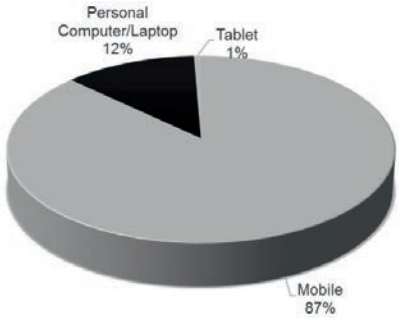
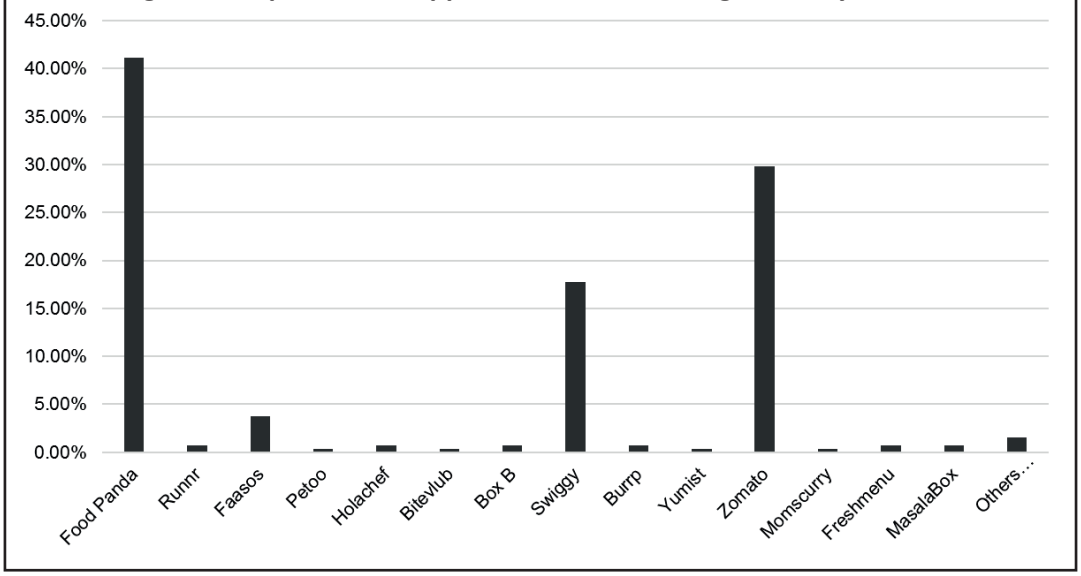
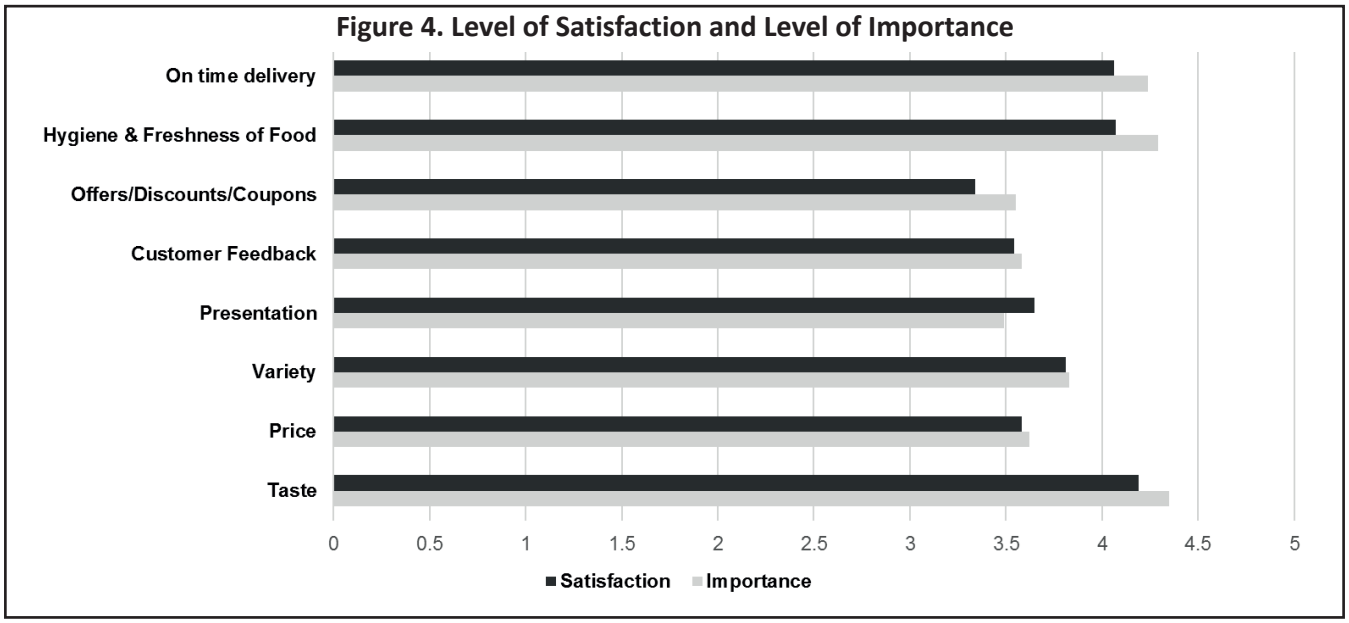
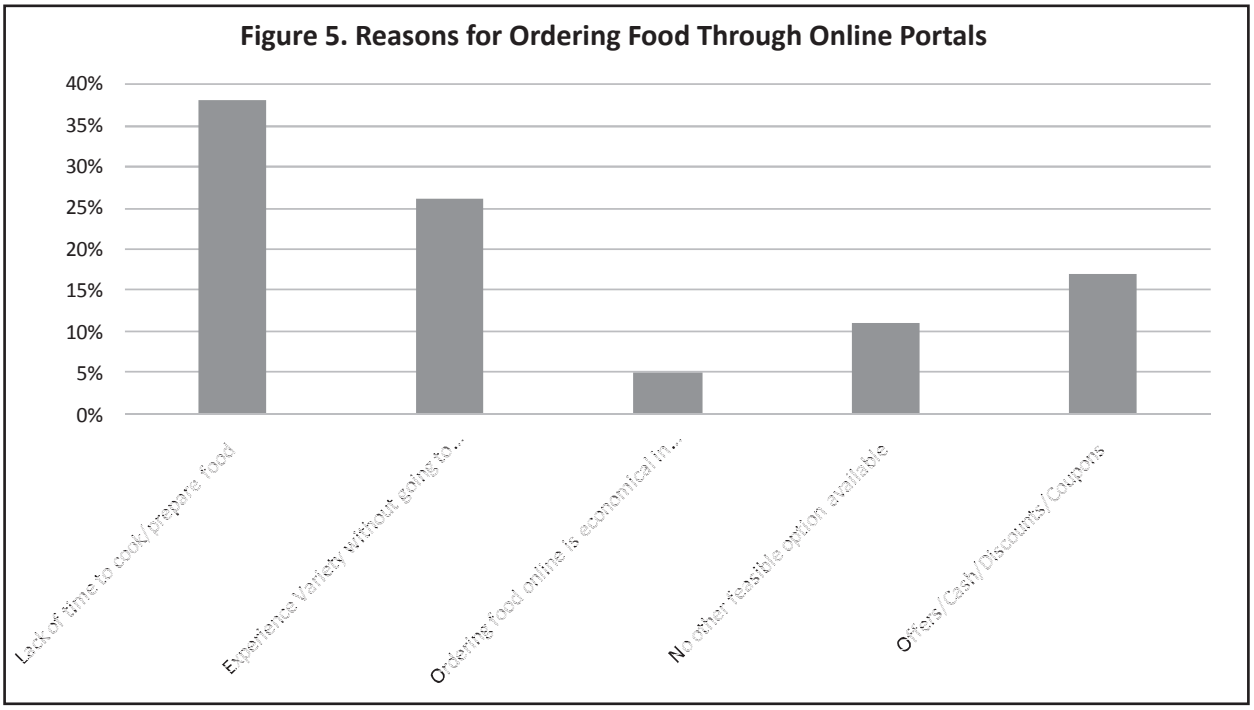


Figure 3. Popular Web/App Based Food Ordering/Delivery Services







Hypotheses Testing

In order to examine whether there is a significant relationship between the preferred mode/device to order and the frequency to order food online, the following hypotheses are specified and tested :

↳ **H01:** There is no significant relationship between preferred mode to order food and the frequency to order food online.

↳ **Ha1:** There is a significant relationship between preferred mode to order food and the frequency to order food online.

To test the above hypotheses, Pearson's correlation is calculated between preferred mode to order and the frequency to order food online. The result of the calculations given in Table 1 shows that the *p*-value for preferred mode to order is 0.046, which is less than the significance level of 0.05. Therefore, H01 is rejected, which implies that preferred mode to order food has a significant impact on the frequency to order food online.

↳ **H02 :** There is no significant relationship between the device used for ordering food online and the frequency of ordering food online.

↳ **Ha2 :** There is a significant relationship between the device used for ordering food online and the frequency of ordering food online.

To test the above hypotheses, Pearson's correlation is calculated between preferred device used to order food online and the frequency to order food online. Result of the calculation given in Table 2 shows that the *p*-value for preferred device to order food online is .390, which is more than the significance level of 0.05. Therefore, H02 is accepted, which implies that the device used for ordering food online does not have a significant impact on the frequency of ordering food online.

In order to examine whether there exists a significant association between gender and preferred mode of ordering food/ dining preference, the following hypotheses were formulated :

↳ **H03:** There is no significant association between gender and mode of ordering food.
↳ **Ha3:** There is a significant association between gender and mode of ordering food.

To test the above hypotheses, a chi-square test for association is carried out. Result of the calculation given in Table 3 shows that the *p*-value is .348, which is greater than the chosen significance level (0.05). Therefore, H03 is accepted, which implies that gender and mode of ordering preference for food do not have a significant association.

↳ **H04 :** There is no significant association between gender and mode of dining preference.

Table 1. Correlations Between Mode of Preference and Frequency to Order Food Online

	Sig. (*p* - value)
Correlations between the mode of preference to order food and the frequency to order food online.	0.046

Table 2. Correlations Between the Device Used for Ordering Food and the Frequency to Order Food Online

	Sig. (*p* - value)
Correlations between the device used for ordering food and the frequency to order food online.	0.390

Table 3. Chi-Square Test for Association Between Gender and Preferred Mode of Ordering Food

	Sig. (*p* - value)
Pearson Chi Square	0.348

Table 4. Chi-Square Test for Association Between Gender and Preferred Mode of Dining

	Sig. (*p* - value)
Pearson Chi Square	0.072

↳ **Ha4:** There is a significant association between gender and mode of dining preference.

To test the above hypotheses, a chi-square test for association is carried out. The result of the calculation given in Table 4 shows that the *p*-value (.072) is greater than the chosen significance level (0.05). Therefore, H04 is accepted, which implies that gender and mode of dining preference do not have a significant association.

Table 5. Independent Samples *t*-test Between the Mean Ratings of Satisfaction Levels of Respondents Pertaining to the Factors Considered Important While Ordering Food Online

Factors	Sig. (p - value)
Taste	0.006
Hygiene & Freshness of Food	0.088
On-time Delivery	0.003
Variety	0.006
Price	0.182
Customer Feedback	0.362
Offers/Discount/Coupons	0.464
Presentation	0.124

Note : Level of Significance: 0.05

In order to examine whether there is a significant relationship between factors leading to satisfaction and the age group of the respondents, the following hypotheses are formulated and tested :

↳ **H05:** There is no significant difference in mean satisfaction score of taste and online ordering of food among various age groups.

↳ **Ha5:** There is a significant difference in mean satisfaction score of taste and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of taste is calculated. The result of the calculation given in Table 5 shows that the mean satisfaction score of taste is 0.006, which is less than the chosen significance level (0.05). Therefore, H05 is rejected, which implies that there is a significant difference in the mean satisfaction score of taste and online ordering of food.

↳ **H06:** There is no significant difference in mean satisfaction score of price and online ordering of food among various age groups.

↳ **Ha6:** There is a significant difference in mean satisfaction score of price and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of price is calculated. The result of the calculation given in Table 5 shows that the mean satisfaction score of price is 0.182, which is more than the chosen significance level

(0.05). Therefore, H06 is accepted, which implies that there is no significant difference in the mean satisfaction score of price and online ordering of food among various age-groups.

↳ **H07:** There is no significant difference in mean satisfaction score of variety and online ordering of food among various age groups.
↳ **Ha7:** There is a significant difference in mean satisfaction score of variety and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of variety is calculated. The result of the calculation given in Table 5 shows that the mean satisfaction score of variety is 0.006, which is less than the chosen significance level (0.05). Therefore, H07 is rejected, which implies that there is a significant difference in the mean satisfaction score of variety and online ordering of food among various age groups.

↳ **H08:** There is no significant difference in mean satisfaction score of presentation and online ordering of food among various age groups.
↳ **Ha8:** There is a significant difference in mean satisfaction score of presentation and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of presentation is calculated. The result of the calculation given in Table 5 shows that the mean satisfaction score of presentation is 0.124, which is more than the chosen significance level (0.05). Therefore, H08 is accepted, which implies that there is no significant difference in the mean satisfaction score of presentation and online ordering of food among various age groups.

↳ **H09 :** There is no significant difference in mean satisfaction score of customer feedback and online ordering of food among various age groups.
↳ **Ha9:** There is a significant difference in mean satisfaction score of customer feedback and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of customer feedback is calculated. The result of the calculation given in Table 5 shows that the mean satisfaction score of customer feedback is 0.362, which is more than the chosen significance level (0.05). Therefore, H09 is accepted, which implies there is no significant difference in the mean satisfaction score of customer feedback and online ordering of food among various age groups.

↳ **H010:** There is no significant difference in mean satisfaction score of offers, discount, coupons and online ordering of food among various age groups.
↳ **Ha10:** There is a significant difference in mean satisfaction score of offers, discount, coupons and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of offers, discount, and coupons is calculated. The result given in the Table 5 shows that the mean satisfaction score of offers, discount, and coupons is 0.464, which is more than the chosen significance level (0.05). Therefore, H010 is accepted, which implies that there is no significant difference in the mean satisfaction score of offers, discount, coupons and online ordering of food among various age groups.

- **H011:** There is no significant difference in mean satisfaction score of hygiene & freshness and online ordering of food among various age groups.
- **Ha11:** There is a significant difference in mean satisfaction score of hygiene & freshness and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of hygiene and freshness is calculated. The result given in the Table 5 shows that the mean satisfaction score of hygiene & freshness is 0.088, which is more than the chosen significance level (0.05). Therefore, H011 is accepted, which implies that there is no significant difference in mean satisfaction score of hygiene & freshness and online ordering of food among various age groups.

- **H012:** There is no significant difference in mean satisfaction score of timely delivery and online ordering of food among various age groups.
- **Ha12:** There is a significant difference in mean satisfaction score of timely delivery and online ordering of food among various age groups.

To test the above hypotheses, the mean satisfaction score of timely delivery is calculated. The result given in the Table 5 shows that the mean satisfaction score of on-time delivery is 0.003, which is less than the chosen significance level (0.05). Therefore, H012 is rejected, which implies that there is a significant difference in mean satisfaction score of timely delivery and online ordering of food among the various age groups.

Discussion

- Lack of time to prepare food has emerged as the most important factor for ordering food online.
- Mobile phone is the most preferred primary device to order food online.
- Foodpanda, Zomato, and Swiggy are the top three app based online food delivery portals available in India.
- While customers consider taste, hygiene, and freshness of food and on-time delivery as the most important factors while ordering food online, variety, price, customer feedback, and offers & discounts are found to be moderately important. Presentation is found to be the least important factor.
- There is a scope of improvement in satisfaction level of customers. Improvement is required in the areas of taste, offer/discounts/coupons, hygiene & freshness, and on-time delivery.

Research Implications, Limitations of the Study, and Scope for Further Research

- The findings of the research are of great significance to the restaurant owners/food start ups who have tied up with popular food ordering portals/apps as they offer fresh insights into the gaps between Indian customers' expectations and their satisfaction levels with service provided by them through online food ordering portals/apps. These restaurants have to improve the overall experience of fine-dining with home delivered food by focusing on taste, hygiene, freshness, and on-time delivery as these are the factors that are critically important to the customers who order food online.
- The results of this research pave the way for further research to study additional factors that are important to the customers while ordering food online.
- The geographic area of the study is limited to NCR of Delhi. Therefore, further research may be undertaken

covering a wider geographic area. Application of the findings at the pan - India level might be limited due to various factors such as differences in taste and lifestyles, variety of dishes and infrastructure, etc.

↳ The findings of the study relate to a particular stage of evolution of the online food industry; hence, the findings may not hold true as the industry evolves further. Research studies at various levels of evolution may be conducted to see the changes in consumer behavior.

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About the Authors

Prof. Bagla has rich and diversified management experience of 35 years in industry and 7 years in academia. He has held senior management positions in UCO Bank, Aditya Birla Group, and Hutchison Essar Telecom Ltd. (now Vodafone). He has done Masters in Economics and Business Administration.

Jasmine Khan is an academic writer with keen interest in Research and Editing. She has done Masters in Business Administration from Amity Business School, Amity University, Noida.