Czech University of Life Sciences Prague

Faculty of Economics and Management

Department of Information Technologies

Bachelor Thesis

Online food delivery services in Kazakhstan

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Faculty of Economics and Management

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Business Administration

Thesis title

Online food delivery services in Kazakhstan

Objectives of thesis

Main objective:
The research's main objective is to understand Kazakh people's attitudes and preferences toward online food delivery services.

Partial objectives:
1. To analyse Central Asia and Kazakhstan's current food delivery market.

2. Survey Kazakh customers and suppliers about online ordering and delivering local goods.

3. To evaluate the results and interpret findings and formulate conclusions.

Methodology

The current situation of the online food delivery market in Central Asia and Kazakhstan will be analysed through a literature review of research papers and secondary literature (professional articles, reports and published surveys). The survey data will be collected both from Kazakhstani suppliers and customers and will be statistically evaluated. By synthesizing the survey results and findings of the literature review, the conclusions will be formulated.

The proposed extent of the thesis

40-50 pages

Keywords

delivery, Kazakhstan, preference, Instagram, culture, attitude, business

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Recommended information sources

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Declaration

I declare that I have worked on my bachelor thesis titled "Online food delivery services in Kazakhstan" by myself and I have used only the sources mentioned at the end of the thesis. As the author of the bachelor thesis, I declare that the thesis does not break any copyrights.

In Prague on 30.11.2023   _____

Online food delivery services in Kazakhstan

Abstract

The main purpose of the thesis is to find out the attitudes and preferences of Kazakhstanis to online food delivery services. The research consists of two parts: theoretical and practical parts.

In the theoretical part was presented basic information about the Republic of Kazakhstan, general information about online food delivery services in the world and Asia, the use of social networks to promote and implement online food delivery, basic information about the use of online food delivery services in Kazakhstan and consumer preferences and behavior in the use of online food delivery services. Thus, the theoretical part provides the basis for the analysis carried out in the practical part.

The practical part of the thesis consists of developing and conducting a survey of Kazakhstani customers and interviews with Kazakhstani suppliers about online ordering and delivery services for local goods. After processing the obtained information, the author formed and tested hypotheses. At the end, the obtained results were evaluated, interpreted and conclusions were formulated based on them.

Keywords: delivery, Kazakhstan, apps, Instagram, culture, mentality, business

Online rozvoz jídla v Kazachstánu

Abstrakt

Hlavním cílem práce je zjistit postoje a preference Kazachů k online službám rozvozu jídla. Výzkum se skládá ze dvou částí: teoretické a praktické.

V teoretické části byly uvedeny základní informace o Republice Kazachstán, obecné informace o online službách rozvozu potravin ve světě a v Asii, využití sociálních sítí k propagaci a realizaci online rozvozu potravin, základní informace o využívání online služeb rozvozu potravin v Kazachstánu a preference a chování spotřebitelů při využívání online služeb rozvozu potravin. Teoretická část tak poskytuje základ pro analýzu provedenou v praktické části.

Praktická část práce spočívá ve vypracování a provedení průzkumu mezi kazašskými zákazníky a rozhovorů s kazašskými dodavateli o službách online objednávání a doručování místního zboží. Po zpracování získaných informací autorka vytvořila a ověřila hypotézy. Na závěr byly získané výsledky vyhodnoceny, interpretovány a na jejich základě formulovány závěry.

Klíčová slova: doručování, Kazachstán, aplikace, Instagram, kultura, mentalita, podnikání

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List of abbreviations

OFDS – Online Food Delivery Services

OFD – Online Food Delivery

FDA – Food Delivery Applications

KZ - Kazakhstan

KAZ - Kazakhstan

1 Introduction

In today's fast paced life, many people cannot afford the hassle of going out to eat or waiting in a restaurant for their food to be served. Thus, instead, they make the food come to them. (Yeo, et al., 2017) To accomplish ordering and home delivery of food, vendors and customers use different services for food delivery. In the modern world, preference is given to gaining popularity and actively developing Online Food Delivery Services.

Kazakhstan, being a progressive state, which actively develops and establishes digitalization in all spheres of the country and the daily life of citizens, also actively began to develop online services for food delivery, especially strong growth of development came during the pandemic, which forced a large number of establishments to go online.

This topic is interesting because Kazakhstan has a good information development, but the sphere of online food delivery is less developed. To better understand this issue, this bachelor's thesis will examine the current situation in the online food delivery market in Kazakhstan and what online food delivery services are used by Kazakhstanis.

In addition, based on a survey of Kazakhstani customers and suppliers about online ordering and delivery services for local goods, the attitudes and preferences of Kazakhstani people towards online food delivery services will be revealed and the main factors that influence their formation will be highlighted.

Online Food Delivery Services in Kazakhstan are relatively new, but promising direction, so the author of the paper is interested to delve into this topic, to identify the main features and problems of this sphere of e-commerce in Kazakhstan.

2 Objectives and Methodology

2.1 Objectives

Main objective:

The research's main objective is to understand Kazakh people's attitudes and preferences toward online food delivery services.

Partial objectives:

1. To analyze Central Asia and Kazakhstan's current food delivery market.
2. Survey Kazakh customers and suppliers about online ordering and delivering local goods.
3. To evaluate the results and interpret findings and formulate conclusions.

2.2 Methodology

The current situation of the online food delivery market in Central Asia and Kazakhstan will be analyzed through a literature review of research papers and secondary literature (professional articles, reports, and published surveys). The survey data will be collected both from Kazakhstani suppliers and customers and will be statistically evaluated. By synthesizing the survey results and findings of the literature review, the conclusions will be formulated.

3 Literature Review

3.1 General information about the Republic of Kazakhstan.

The Republic of Kazakhstan is located in the center of the Eurasian continent and belongs to the countries of Central Asia and the countries of the former Soviet Union. The country has a huge territory and favorable transport and economic position because it is located between Europe and Asia. The state is a unitary state with a presidential form of government. According to the Constitution, the country claims to be a democratic, secular, legal, and social state, the highest values of which are the human being, his life, rights, and freedoms. (Gov.kz, 2020)

Stable growth in all sectors of the economy, international recognition, and political stability have become the basis for the prosperity of Kazakhstan's society. Kazakhstan is a future-oriented country that preserves its cultural traditions and successfully realizes its enormous creative potential in today's dynamic world. (Gov.kz, 2020)

3.1.1 Information development of the country.

Today there is no doubt that digital technologies are firmly entering our lives, accelerating their pace and thereby making life easier for humanity. Kazakhstan is one of the developing countries and since gaining independence it has actively begun to develop and pay great attention to the development of the country, paying special attention to the development of the digital direction. To develop the industry, various government programs are being adopted, which are a set of programs aimed at improving the standard of living of every resident of the country through the use of digital technologies and providing the population with wide access to the Internet.

Kazakhstan actively carries out systematic work to promote IT innovations in the public sector. The government is interested in improving the digital literacy of the population and strengthening the professional competencies of service providers. (Bokaev, et al., 2021)

One of the first modernizations adopted in the country was the project for the introduction of electronic government. Kazakhstan was part of the USSR until its collapse in 1990, and after gaining independence in 1991, it quickly recognized the need for a transparent and accountable government. Against the backdrop of the challenges of the transition period, the

government decided to implement e-government to achieve two goals: to ensure fast and high-quality access to government services and to increase the efficiency of government services through the widespread use of ICT in the public sector. (Bhuiyan, 2009)

Already on April 12, 2006, Kazakhstan switched to an electronic government system. Currently, the state program "Electronic Government" is working well and is actively used, which allows citizens to easily receive and request any necessary documents online, as well as order and even receive electronic versions of documents within a couple of minutes. With the development of information technology, it has become possible for government agencies to work effectively, in particular, in the provision of public services to the population and business structures. (Bhuiyan, 2009)

On March 28, 2023, a new program "Digital transformation and development of the information and communication technologies and cybersecurity industry for 2023–2029" was developed and adopted. The main goals of which are:

1. Digital transformation and comprehensive development of the country's innovative potential
2. Development of information and communication technologies
3. Development of cybersecurity
4. Creation of a national artificial intelligence system
5. Development of infrastructure and connecting to the Internet the remaining villages with a population of less than 250 people
6. Implementation of the "Smart City" concept
7. Development of digital business models, products and digital economy
8. Raising public awareness on cyber hygiene issues

(Government of the Republic of Kazakhstan, 2023)

At the moment, Kazakhstan has a very high e-government development index and ranks 28th; in addition, the country ranks 8th in the index of online services, 92% of which are provided in electronic format. Based on a study released by the United Nations in 2022, Kazakhstan occupies a leading position among the countries of Central Asia and the countries of the former Soviet Union and is in second place after the United Arab Emirates in its assigned category. (United Nations, 2022)

Figure 1 Distribution of countries by development level of e-government based on complex network analysis pilot study findings and EGDI values, 2022.
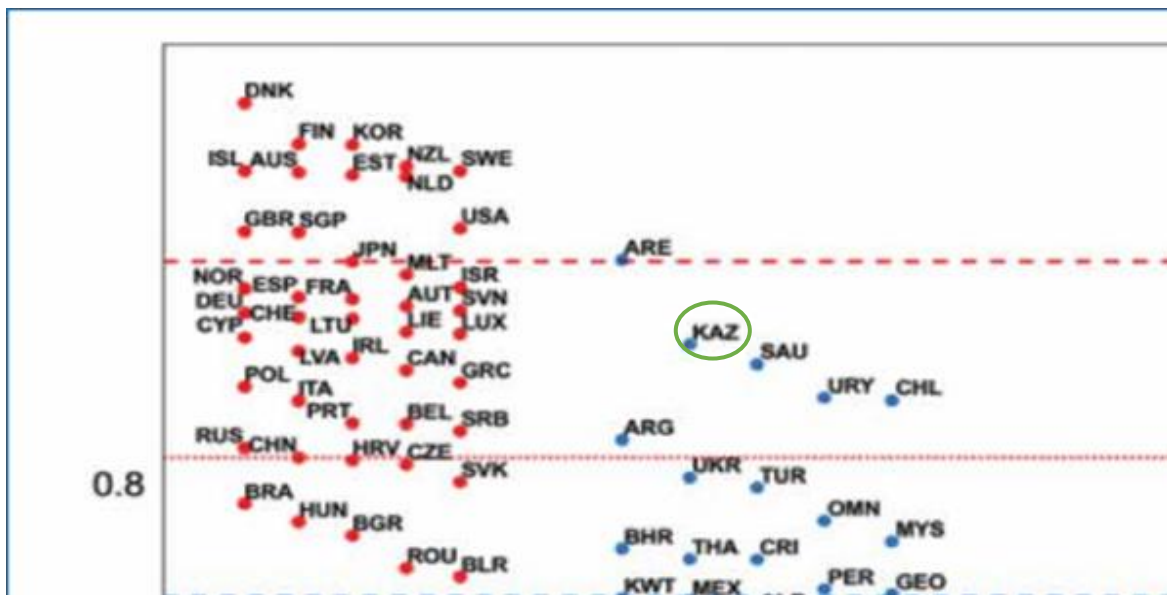
Source: United Nations E-Government Survey, 2022. (United Nations, 2022)

In addition to the active development of e-commerce in the country, Kazakhstan also has a very developed online banking system. Kaspi Bank is one of the most popular banks and even applications in Kazakhstan. It is convenient and easy to use and is also very versatile. (Kaspi bank, 2023)

This application includes an online bank, where you can open an account, deposit, take an interest-free loan "up to salary", and make international and local transfers by phone number or card number. In the bank branches, there are machines for issuing physical cards, which will be ready in 2 minutes after passing the identification through facial scanning. Payment by QR code is very popular in the country and is available in both large and small shops and businesses. (Kaspi bank, 2023)

In the Kaspi app, bank customers also have access to the government services feature where they can pay taxes and fines, as well as obtain necessary documents. The app also offers electronic versions of ID cards, driving licenses, and car passports that were officially equated to paper in July 2022. (TENGRI, 2022)

The app also has an online shop with a huge variety of different products, from electronics and home appliances to groceries and medicines, for which installments are available for 3, 12, and 24 months from Kaspi Bank, which can be arranged in a couple of clicks. The app

also has an ad board for finding job openings for work and part-time jobs. In addition, the bank's application allows you to buy tickets for planes, trains, and other means of transport, both within the country and for international flights. (Kaspi bank, 2023)

People in Kazakhstan are very much into convenience, so most of the banks in the country have also started improving their apps to provide more services. Over the past few years, people have become so used to having everything they need on their phones, which has become a big problem in Kazakhstan during January 2022.

At the beginning of January 2022, mass protests started in Kazakhstan, which rapidly spread throughout the country and led to riots and even vandalism. For this reason, communication, the internet, and other means of communication were blocked throughout Kazakhstan. Because of these events, a large number of people who were used to using only online banking found themselves without money for their needs. Huge queues lined up at ATMs in cities, and many systems suspended their work, which hurt many companies and the financial and mental state of citizens. (Brodovskaya, et al., 2022)

All the above factors indicate a high level of development and importance of e-commerce and information technology in the lives of people living in Kazakhstan. Therefore, Kazakhs try to improve and simplify all spheres of their lives through modernization.

3.1.2   Kazakh people, their mentality, and its influence on doing business.

Kazakhstan is a large multinational state in Central Asia, which has a rich and interesting history of development. Due to various historical events and locations, many different peoples and ethnic groups live on the territory of Kazakhstan, which has different cultures, values, religions, and languages, but at the same time coexist harmoniously and peacefully with each other.

Culture and history have generally determined the style of how business is conducted, so this chapter will look at the peculiarities of negotiating through the prism of national values. Kazakhstan is interesting because as a country that combines elements of European and Asian cultures, it has developed its style of communication that combines both modern trends of the West and ancient traditions of the East. (Didik, 2018)

The first thing that comes to mind when Kazakhstan is mentioned is hospitality. (Didik, 2018) For Kazakhs, any guest is an honored person, so since ancient times they have paid great attention to the process of welcoming guests. It is important to them that the guest is warm, comfortable, fed, and in need of nothing. The best place at the table is prepared for the guest, and the table should be full of different treats. Hospitality is literally in the DNA of Kazakhstanis and is evident at home, in restaurants, and on the streets. People are happy to help in any way they can and make every effort to do so. Such a bright character trait has also manifested itself in doing business. For Kazakhstani businessmen, an important part of concluding a contract is going to a restaurant and celebrating a successful deal. If the business partner is from another city, and even more so from another country, an important part is also meeting at the airport, touring beautiful local things, and getting to know the local culture.

Honoring traditions and respect are also part of the Kazakh mentality. Traditions and customs still occupy a significant part of people's lives, they are proud of them, honor them, and love to share them with others. Respect in Kazakhstan is especially developed among the elders, and it does not matter how much a person is older: a month, a year, or 10 years. Respect for elders by age, and rank; respect for other nations and cultures; respect for other people's opinions - all this is peculiar to the representatives of Kazakhstan. At a business meeting, the junior is the first to greet the senior. This principle is maintained when people of different positions meet. Any representative of the business community knows that the right form of address to potential partners is the key to successful negotiations. (Didik, 2018) In Kazakhstan, people also emphasize this. However, business partners of the same status, after a successfully concluded deal, by mutual agreement can switch to an informal way of communication, which emphasizes their close and even friendly relations.

In Kazakhstan, age is a symbol of wisdom. Older age commands special respect. Kazakhs believe that there is a lot to learn from their elders. Their life experience is worth sharing. The Council of Elders is a pearl of wisdom. (Karibayeva & Kunanbayeva, 2016)

In Kazakh people there are many synonyms for the concept "Motherland", and it shows how important the quality of patriotism is for the representatives of this culture. Kazakhs are patriots, they love and appreciate their country, so they may be inclined to work with local businesses and businessmen. Historically, Kazakhs have long led a nomadic lifestyle. They

were never tied to a place and were always ready to get back on the road again. (Didik, 2018) For them home was the earth beneath their feet and the sky above their heads, so Kazakhs are a very freedom-loving people, which often manifests itself in persistence at work and the ability to defend their rights and freedoms.

People traditionally lived in close groups and large families that moved throughout the year to support large numbers of livestock. Therefore, family is a very important part of life for Kazakhs and is a source of pride. For this reason, it is not uncommon in Kazakhstan to find family holidays organized by companies and informal meetings of partners with their families.

Another cultural trait that is also expressed today in the business sphere is generosity, namely the culture of gifts. Among Kazakhs, it is customary to give gifts to those who visit their country, city, or home for the first time. For Kazakhs, giving gifts to their business partners is a kind of investment in further cooperation, and it is done at the very beginning of building relationships. (Didik, 2018)

A common form of greeting in Kazakhstan is a handshake. When shaking hands, Kazakhs make eye contact and may smile. (Didik, 2018) The handshake is usually soft, and using both hands, it is necessary to greet everyone, otherwise, people may consider a person rude or take everything into account, which can negatively affect further communication. In addition to greetings, a handshake is often used after a deal and even during the farewell. If the deal is successful, Kazakhs may even give their business partner a friendly hug to show that they are now in a close relationship.

Kazakhs are characterized by lengthy negotiations, it is also characteristic of the Kazakh people to be persistent and raise their voices, but this is not always a manifestation of aggression or dislike but can be a common manifestation of persistence. (Didik, 2018) Kazakhs are by nature a very peaceful people, which can be seen in the country's politics, business, and lifestyle. For this reason, they prefer to deal with issues as diplomatically as possible, every businessman of Kazakh culture understands this and is aware of their weaknesses. At the end of a meeting, Kazakhs try to create an atmosphere in which it is clear to the interlocutor how and where their relationship will develop. (Didik, 2018)

Kazakhs have a strong sense of "face" or personal dignity. As a result, many decisions in personal life are often juxtaposed against public opinion. (Karibayeva & Kunanbayeva, 2016) Public opinion is very important to Kazakhs, so they try to always look good during business meetings and at gatherings. Good appearance shows high status, so often people like to buy expensive suits, jewelry, and other wardrobe items. Personal offices are also considered a reflection of status, especially their spaciousness and equipment.

Building trust and loyalty with business partners and colleagues is an important part of business interaction among Kazakhs because for them an important part of a deal is not only personal gain but also the relationship with the partner and the prospect of their cooperation. (Karibayeva & Kunanbayeva, 2016)

3.2   Online Food Delivery Services

In the digital age, fueled by society's ability to utilize the Internet, a new business trend has emerged - e-commerce. Together with the development of information and communication technology, a change in the way of life of society will follow. (Sjahroeddin, 2018)

This trend was activated worldwide during the covid pandemic, which served as a huge impetus for the development and evolution of multiple options for buyers and sellers to interact with each other to be able to deliver and receive goods and services door-to-door.

The economic crisis caused by COVID-19 was a powerful trigger that pushed the digitalization of business. E-commerce had tremendous advantages during a period of severe quarantine restrictions and helped provide factors that were particularly important at the time: no contact, affordable prices, mobility, and scalability. (Gu, et al., 2021)

In addition, the widespread use of social media and digital marketing gave companies the opportunity to seek and attract new customers globally, nationally, and locally. At the same time, they offer great opportunities to significantly reduce operating costs by not having to invest in real estate or hire a large number of employees. Current trends in e-commerce are related to convenience and security. (Gu, et al., 2021)

The increasing use of the Internet as a platform for exchanging goods and services is fueled by the proliferation of e-commerce websites, mobile commerce applications, instant payment systems, and mobile payment systems. For most people, the use of e-commerce in

ordering and delivering goods has become an integral part of life as it is usually a fast, convenient, and easy to use way of communication between buyer and seller. (Zhanturin & Bukhonin, 2022)

Consumers prefer e-commerce platforms as a means of shopping because they can shop from the comfort of their homes and at their leisure. (Yeo, et al., 2017) E-commerce platforms are used as an effective way to help the overall service process such as online ordering and food delivery. For example, online food delivery (OFD) services are leading the way in e-commerce today. (Gavilan, et al., 2021)

In today's world, the restaurant business makes extensive use of information technology and includes online food services and food delivery services from supermarkets, cafes, and restaurants. (Zhanturin & Bukhonin, 2022) Simply put, OFDS orders and delivering food from various restaurants through a website or app. Customers usually search for their favorite restaurant, choose from the available dishes, and provide a delivery address. (Gavilan, et al., 2021)

Many restaurants have moved from offline to online platforms by developing their own websites and allowing customers to order food through the restaurant's own website, and the growing use of smartphone apps has prompted restaurants to launch their own apps that also serve as online food ordering platforms for consumers. (Shankar, et al., 2022)

The COVID-19 pandemic has changed consumer behavior and how they purchase food in Asia, food and beverage e-commerce started to grow rapidly even before the pandemic. However, the quarantine caused by the pandemic has pushed this trend to a higher level, the volume of online food delivery has increased dramatically around the world and in Asia among others. (Pingali & Abraham, 2022)

Currently, there are two main categories of OFD service providers: the restaurant itself and other suppliers. Examples of restaurants that provide their own OFD services are McDonalds and KFC. While other OFD service providers may be multi-restaurant apps or websites such as Wolt and Glovo. (Sjahroeddin, 2018)

OFD has been witnessing exponential growth in recent years. According to the "Global Online Food Delivery Market Report 2020-30", the global OFD market is expected to grow

from $107.44 billion in 2019 to $154.34 billion in 2023 at a CAGR of 11.51%. The above statistics indicate the huge growth potential of OFD system across the globe. (Shankar, et al., 2022)

3.2.1 Food delivery apps

Globally, the growth and use of food delivery apps and platforms has revolutionized the way food providers and consumers interact. Food delivery applications (FDA) are an online-to-offline mobile service that provides the means for convenient and efficient online ordering and offline delivery of goods and services. (Muangmee, et al., 2021)

Essentially, online food delivery apps are the intermediaries through which restaurants deliver food to the doorsteps of their customers. (Ganatra, et al., 2021) For example, KFC fast food restaurant partners with online intermediaries such as Uber Eats and through them can deliver from online to offline. This means that a customer places an online order through a third-party online intermediary and the restaurant delivers the food to their home. (Gavilan, et al., 2021)

The main convenience of using delivery apps is that the customer can search and select meals without time constraints, then place them in a "shopping cart", place the order and make payment. In addition, throughout the preparation and delivery process, the customer can track the status of the product and its delivery. (Gavilan, et al., 2021)

Food delivery apps fall into two main categories: large chain restaurants with their own services and apps, such as Burger King, McDonald's and KFC, and multi-restaurant apps, such as Wolt and Glovo, which collaborate with both large and popular as well as small local cafes and restaurants. (Ray, et al., 2019) However, recently, more and more restaurants, cafes and stores have started to develop and launch their own personal food delivery apps to be more independent and not to pay other services a percentage for delivery.

3.3 Using social media to promote and implement food delivery

Social media platforms are one of the most widely used sources of information in the world, easy and inexpensive internet access, and a large number of registered users on these platforms make them one of the easiest and most effective ways to disseminate information.

People especially use the search for information during major events of any nature, for example, it could be a world cup, a worldwide pandemic, or a natural disaster.

With the rise of social media, the industry has shifted from traditional methods of corporate communication to public relations through large online platforms that have opened a new frontier in the way business is conducted. (Venkateswaran, et al., 2019) The use of online networks and communities helps people to easily create and share information, ideas, and interests, interact with potential customers, and get feedback from them in the form of likes and comments. Most companies are now making equal efforts to use traditional and online platforms because both are very effective and online platforms have great prospects and benefits, hence social media in business is gaining recognition by organizations all over the world. This is because the internet provides a platform where companies can gain a wider audience and bypass various challenges such as time, accessibility, affordability, and distance. (Venkateswaran, et al., 2019)

Social media has proven to be one of the most active online platforms globally, with more than 3.6 billion users in 2020, and is expected to reach 4.4 billion in five years. (Sadyk & Md Zahurul Islam, 2021) This rapidly increasing number of users of social networking sites makes them very attractive to various organizations and companies as well as marketers. Online advertising has become the new frontier in doing business, so today people stumble upon adverts almost as soon as they pick up their gadget, and clever algorithms suggest products of interest on all the sites they use. For example, promotional emails and SMS messages, adverts while browsing feeds on many social media platforms like Instagram, Facebook, Twitter, and TikTok. Through this, large corporations interact with their customers, and small private firms have the opportunity to communicate about themselves to a wide audience.

Facebook, YouTube, Instagram, Twitter, and other social networks play an important role in how online users find, research, and share information about brands and new products. (Venkateswaran, et al., 2019) But beyond that, social media also allows you to sell and buy products without leaving the app. Additional features and functionalities such as Facebook Marketplace, Instagram and What's App for Business, etc. have started gaining more popularity. However, with the advent of this feature, the number of frauds has increased, so it can be dangerous to buy or order something on such sites, and customer trust is at a low

level. Therefore, active social media users are more likely to read product reviews online to learn more about a product and find out about a company's trust, reputation, and history before buying. (Venkateswaran, et al., 2019)

Another important use of social media for any business is to track the competitive position of organizations, providing vital market information and statistics on the industry. Social media also facilitates the sharing of knowledge and expertise, thereby accelerating innovation and the development of new products based on consumer suggestions and recommendations. From a brand perspective, social media markedly enhances the voice of consumers and their ability to influence the creation, promotion, and consumption of existing brands, activating customer participation in the creation of brand value. (Venkateswaran, et al., 2019)

In today's world, the internet is home to various digital activities including digital marketing and sales. People use social media as a place to sell their products digitally and also to establish good communication with customers. (Agung & Darma, 2019) Today, social networks have developed as an effective platform for the promotion of goods and services. Instagram is one of the most popular social networks in the world, as well as a useful platform for promoting and advertising goods and services. (Gubasheva D.T.1, 2019)

Figure 2 Most popular social networks worldwide as of January 2023, ranked by number of monthly active users.

Most popular social networks worldwide as of January 2023, ranked by number of monthly active users (in millions)

Social Network	Monthly active users (in millions)
Facebook	2,958
YouTube	2,514
WhatsApp*	2,000
Instagram	2,000
WeChat	1,309
TikTok	1,051
Facebook Messenger	931
Douyin**	715
Telegram	700
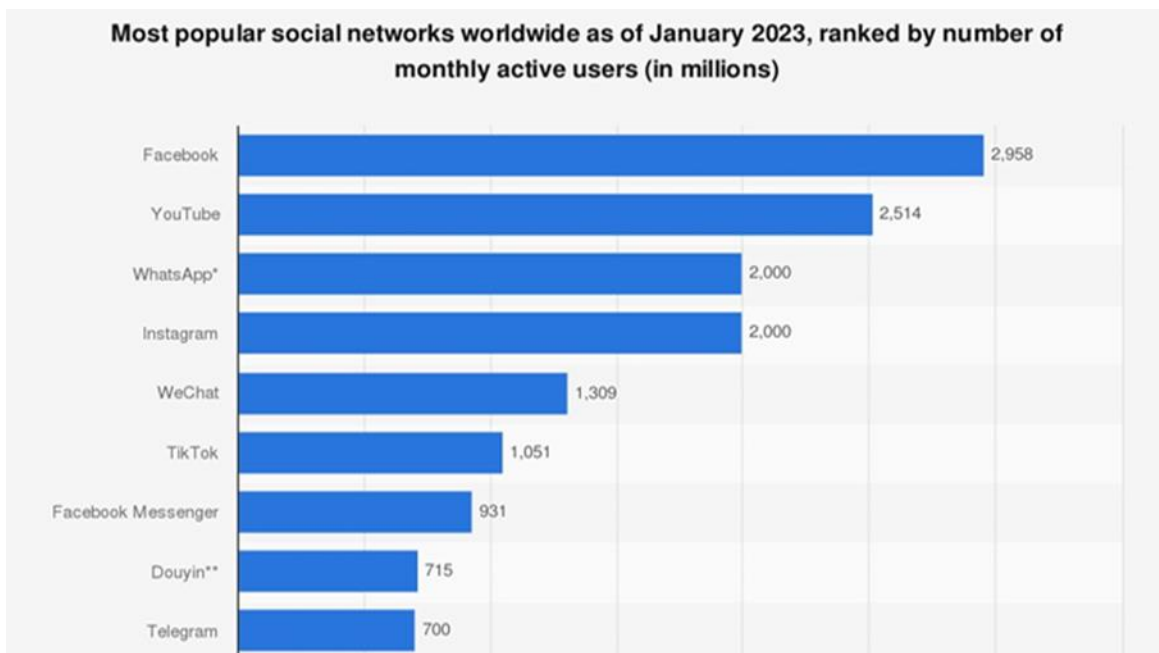
Instagram is great as an online shopping platform because it initially specializes in publishing photos and video content that customers need to order products. In addition, Instagram's algorithm opens up various opportunities for online marketers to grow their business, especially for attracting potential customers. Also, it allows online marketers to easily monitor the situation and market conditions so that they can identify the right and innovative marketing strategies to stay ahead of the competition and attract more audiences. (Agung & Darma, 2019)

With an easy Instagram feedback system like likes, reposts, comments, subscriptions, and directs, consumers can connect with marketers and get their needs quickly. Customers can directly give their opinions or compare products or services, and the user-friendly design and specialization in photos and videos help them easily find and review the products they like. In addition, a convenient "stories" and "relevant" system keeps customers up to date with all new and ongoing promotions and news of a company or brand.

In addition, Instagram has added many features for the full-fledged promotion of goods and services. In 2016, an opportunity to create a business profile appeared. When switching to a business account, the user has the opportunity to track statistics and promote posts. (Pozhidaeva, 2021)

However, Instagram has several disadvantages, such as a higher level of fraud and mistrust on the part of customers, as well as the lack of any well-established in-app system for ordering, payment, and delivery of goods and services. Because of this, customers and businesses have to use other apps thus increasing the risk of coming across fraudsters.

There is no doubt that social media opens new frontiers in doing business, but there are both advantages and disadvantages to using social media. The table below summarizes the main advantages, disadvantages, and risks in using social media to promote business:

Table 1 Advantages, disadvantages, and risks in using social media to promote business.

Advantages
•   Learn about your audience
•   Better target audience identification

• Lower cost	
• Getting instant feedback from a consumer perspective	
• Personalizing consumer interactions	
• Creating a corporate identity	
• Increasing market awareness	
• Accelerates innovation and new product development	
• Increase online visibility	
• Facilitating recruitment and staffing	
• Facilitates and speeds up communication	
• Building trust and loyalty	

Disadvantages	*Risks*
• Updating social media accounts takes time and effort.	• Negative comments
• Social media is not completely free.	• Viruses and malware
• Information is only visible for a short time before newer posts replace it.	• Brand hijacking
	• Lack of control over corporate content
• Reduce face-to-face communication	• Unrealistic customer expectations
• Social media marketing makes you lose control	• Non-compliance with record management regulations

Source: author, based on *(Venkateswaran, et al., 2019).*

Many different companies are actively promoting their services and products through social media and Instagram. Today, the restaurant industry is developing at a rapid pace and are also active users of Instagram. (Pozhidaeva, 2021)

Restaurants and cafes in many countries are placing great emphasis on maintaining their Instagram page to connect with their customers, find new customers and spread various promotions and offers. This is because social media users increasingly prefer to view visual information, and information in images and short videos is easier and quicker to be perceived by the audience. (Lee, et al., 2021)

During Pandemic Covid, Instagram became one of the main services through which restaurants, cafes and stores could continue to operate without investing additional funds. Many of them found themselves in a difficult financial situation during this period and could not afford to allocate additional funds to develop or purchase their own food delivery apps and websites, or to pay interest to ready-made food delivery platforms.

Therefore, Instagram became the perfect option for them because there was special call to action buttons: call, email, buy, download, learn more, see more, etc. All these innovations attracted different companies to this social network, because now goods and services there could not only be promoted, but also sold. (Pozhidaeva, 2021)

3.4   Using of online food delivery services in Kazakhstan.

Kazakhstanis are active users of the Internet. According to a study of the Internet space conducted by the international agency Wunder Digital, the Internet penetration rate in Kazakhstan is 90.1%. This is quite natural, given the young average age of Kazakhstanis - more than 50% of Internet users in Kazakhstan are under 35 years old. Almost 14 million Kazakhstanis use social networks (more than 72% of the population, including infants). (Marmontova & Tazhibaev, 2023)

The share of Internet users who bought goods and services online rose to 17.7% in 2021, up from 15.6% a year earlier. (Momynkulova & Abutalipova, 2022) There is a positive dynamic of digitalization. According to the survey results, people have started to buy more through online marketplaces, online electronics stores and delivery services. (Yelesh & Yelamanova, 2020)

Based on the above factors, it can be understood that Kazakhstani people are actively mastering and using various online platforms in their daily life. Therefore, the use of online food delivery services is also gaining popularity among buyers and suppliers.

The trend of food delivery in Kazakhstan started to develop actively with the emergence of Covid-19, adjusting to the new circumstances people created new habits in ordering food, changing the old ones. (Yergaliyeva, et al., 2022) However, most people in Kazakhstan prefer to order food delivery at work, in case of time constraints, on holidays or because of the desire to eat unusual food at home. (Yelesh & Yelamanova, 2020)

Apps and websites for ordering and delivering food are becoming quite popular in Kazakhstan, but their availability and variety directly depend on the city in which the client lives. The largest number of active food delivery services are located in the capital of Kazakhstan - Astana, in the second largest city of the country - Almaty and in the city of Pavlodar. (Ahead, 2023)

Young people often order takeaway food, whereas the older a person is, the less likely he or she is to order food delivery or takeaway food. (Yelesh & Yelamanova, 2020) Kazakhstanis aged 20-35 are actively using food delivery as it has been found to save them time. (Yergaliyeva, et al., 2022)

Given the fact that almost all restaurants and cafes closed for the quarantine period, food delivery services became the only bridge between restaurants and their customers during the self-isolation in Kazakhstan. (Yelesh & Yelamanova, 2020) Therefore, it was during this period that Kazakhstanis began to actively explore online delivery and continued to actively use it after the restrictions were lifted.

At the moment, the main online food delivery services in Kazakhstan are special online platforms for food delivery, restaurants' own apps and websites, and ordering food delivery via Instagram and WhatsApp.

3.4.1 Special online platforms for food delivery

Dedicated online food delivery platforms are one of the most progressively developing technologies in the food delivery industry. Now the number of online platforms in Kazakhstan is quite high. People in Kazakhstan use already known international services such as Glovo, Wolt and Yandex Food, but also develop and launch their own multi-restaurant services such as ChocoFood, Emenu, FoodGo and Abr+. The table below summarizes the Top 5 most popular online food delivery platforms in Kazakhstan: (Nazirova, et al., 2023)

Table 2 The largest food delivery platforms in Kazakhstan

Platform name	In Kazakhstan since	Number of cities	Revenue for 2022	Origin country	Official website

Glovo	2019	14	$54,29 mil	Spain	https://glovoapp.com/kz/
Wolt	2019	18	$42,64 mil	Finland	https://explore.wolt.com/ru/kaz/
Choco Food	2013	25	$15,36 mil	Kazakhstan	https://chocofood.kz
Yandex Food	2019	18	$13,2 mil	Russia	https://eda.yandex.kz
Emenu	2015	18	-	Kazakhstan	https://emenu.delivery

Source: author, based on Forbes Kazakhstan: 45 largest online trading platforms in Kazakhstan – 2023. *(Nazirova, et al., 2023)*

The table above reflects the popularity of food delivery services in Kazakhstan. The most popular international platforms are Glovo, Wolt, and Yandex Food. During the pandemic, the popularity of such platforms increased particularly sharply. For example, the level of interest in Glovo and Wolt services increased by 50%. (Yelesh & Yelamanova, 2020) And among the platforms developed and launched in Kazakhstan the most popular are ChocoFood and Emenu, they were the first to appear on the Kazakhstan market quite a long time ago in 2013 and 2015, when international counterparts arrived in 2019. (Nazirova, et al., 2023)

Timur Izbergenov, Senior Manager of Glovo Brand Partnership, noted that online food ordering service Kazakhstan is not fully developed, but its market is very favorable for development and expansion. Also, the growth of orders depends on the penetration in cities, the higher the penetration level, the greater the growth of orders. (Yergaliyeva, et al., 2022)

The Operations Director of the local ChocoFood platform noted that free delivery increases the frequency of orders among Kazakhstani customers but does not affect the revenue generated. He also noted that the city of Almaty ranks first in the number of users of dedicated online food delivery platforms. (Yergaliyeva, et al., 2022)

3.4.2 Own mobile applications and websites of restaurants, cafes and shops

During the Kovid pandemic in Kazakhstan, chain and private supermarkets, restaurants and cafes were hit hard. Therefore, in order not to go bankrupt and continue to operate, they had to quickly adapt to the situation: they had to switch to online delivery.

The government introduced restrictive measures, and people had a fear of leaving their homes and doing free shopping. Customer habits and behavior changed, and in this situation

the entire Kazakhstan OFDS focused primarily on improving the quality of customer service. (Alkeyeva, et al., 2021)

In addition to social media activity, most cafes, restaurants, and supermarkets quickly reoriented themselves during the crisis and within a short period of time started to create their own websites and apps through which customers could shop from the comfort of their own homes. This option became very popular because it allowed cafes and restaurants to remain independent from third-party platforms and not pay them a percentage of each order.

For example, large supermarket chains such as Galmart created their own website and launched their own delivery service to maintain quality service. Another large Kazakhstani supermarket chain Magnum has launched its own grocery delivery app and as part of its marketing strategy to attract more customers it is constantly launching various promotions. (Alkeyeva, et al., 2021)

According to Maria Moon, head of marketing at Magnum chain supermarket, the target audience of people using their food delivery services are tied to specific interests and needs rather than age, gender, location or social status. (Yergaliyeva, et al., 2022)

3.4.3   Instagram and WhatsApp

Instagram is the most popular social network in Kazakhstan and has the largest number of users with 58.2% of the total population. (Sadyk & Md Zahurul Islam, 2021) According to the Digital 2022: Kazakhstan report, Instagram has the highest number of users in Kazakhstan among social networks. (Kemp, 2022)

Next, the most popular social networks are VK and Facebook, and the most popular messengers are WhatsApp and Telegram. WhatsApp doubled in popularity after government restrictions were imposed during the pandemic. Messenger Telegram also saw a significant growth after the quarantine was announced. (Yelesh & Yelamanova, 2020)

In addition to being big fans of a pretty picture online, Kazakhstanis are also active on social media such as Instagram. Especially active use of Instagram started during the pandemic, when there was no ready alternative on the Kazakhstani market to make online sales without additional costs. For this reason, Kazakhstani people began to publish their goods and

services on Instagram, as well as order and deliver goods via various messengers such as WhatsApp.

The country's restaurant sector has also switched to using Instagram, WhatsApp, and Telegram to make deliveries and take orders. These social networks have become the best option for the continued operation of establishments under quarantine restrictions and have kept small companies from incurring additional costs in the form of buying or developing ready-made websites and applications, or cooperating with ready-made platforms that charge a high percentage for their work.

At the moment, many restaurants, cafes and stores in Kazakhstan still continue to deliver food through social networks. Especially popular is the system of booking tables through Instagram Direct and WhatsApp.

3.5 Consumer preferences and behavior in using OFDS

Nowadays, almost all spheres of life relate to the consumption of goods and services. Modern man consumes a variety of products every day, while giving preference to certain brands and companies. (Turdaliyeva, et al., 2021)

Knowledge of the peculiarities of consumer behavior in the market, his motivation. and factors that attract attention and influence loyalty - the basis for building a successful business strategy and brand communication. (Turdaliyeva, et al., 2021) Reasons that motivate consumers to make purchases in the online environment are important for food retailers. found a positive relationship between attitude and behavioral intentions (Yeo, et al., 2017)

The link between quality service, customer satisfaction and ongoing loyalty drives the adoption and implementation of food ordering apps. Ordering food online through delivery apps and perceived service quality can influence customer experience, satisfaction, and loyalty. (Rowland, 2022)

Customer behavior is influenced by factors such as order matching, courtesy and friendliness of delivery staff, cleanliness of food boxes, excellent condition of the ordered food received, and affordable delivery cost. (Ray, et al., 2019) In addition, customer service quality, delivery experience, convenience, quality control, quality control, community pressure, ease

of use, restaurant search and listing also shape customers' preferences in choosing OFDS. (Muangmee, et al., 2021)

- *External factors*

There are a few factors that influence consumer behavior, including external factors such as the global pandemic that forced people to change their habits and lifestyles. (Ganatra, et al., 2021) Consumer behavior has been influenced by both the COVID-19 pandemic itself and government restrictions. (Gu, et al., 2021)

People were forced to adjust to the new circumstances, but also to maintain their usual leisure activities. Therefore, going to restaurants and cafes was replaced by ordering their favorite meals at home. After the end of self-isolation, people continued to actively use OFDS because it was convenient and profitable, and their preferences and behavior were changed.

In addition, many businesses continued to operate by targeting online customers, which made it easier for users to access ready-to-eat meals. The change in the system helped restaurant owners to stay in business despite the difficulties of quarantine and mitigated the impact of the restrictions on revenues; without the FDA, most restaurant businesses would have faced bankruptcy and liquidation. (Muangmee, et al., 2021) However, take-out restaurants are now going strong, and some are making a complete transition to online operations and delivery.

- *Previous experience*

A customer's past experience or the experience of their friends and close people can have a great influence on his or her willingness to use a certain OFDS or to order from a certain restaurant, cafe, or store.

A positive experience positively influences the frequency of use of the service by the consumer and spreads the good reputation of the establishment or platform. Where a negative experience can completely discourage customers from using it and recommending it to others. Because of this, people are sometimes afraid to order food online because they have once received a wrong order, or the food was delivered cold and of poor quality. (Ganatra, et al., 2021)

An individual's online experience includes their engagement, cognitive process, flow, and schema. A consumer can learn from their experience by interacting with the online environment. There are two types of online shopping experiences. The first is direct product experience, where the user directly interacts with the product itself. The second is the indirect online experience, meaning that the user only interacted with the advertisement of the product. (Yeo, et al., 2017)

- *Price saving orientation*

After the Covid pandemic, when people had an urgent need to explore online delivery services, Internet users became more confident in online shopping and more interested in purchasing quality products at lower prices. (Gu, et al., 2021)

Lower prices are attractive and tempting to consumers. In the food segment, different categories of consumers tend to choose different levels of quality and price of food products. (Yeo, et al., 2017)

This is because customers always want to stay in a favorable position, so the likelihood of increasing orders may depend on promotions and discounts provided by restaurants or platforms, free or cheap delivery, but the good quality and appearance of the product or food must be maintained.

- *Speed and efficiency*

Food delivery apps should provide information effectively so that it is not difficult to find. They should pay more attention to food quality and service providers should be able to address customer concerns or complaints. (Ganatra, et al., 2021)

Consumers are gradually adopting food delivery apps to make the transactions convenient and fast. Consumer experience of using online food delivery apps in terms of perceived quality affects loyalty and satisfaction. (Rowland, 2022) Because consumers are increasingly using meal delivery apps to make their lives easier and get convenient and quick food delivery. (Tandon, et al., 2021)

- *Service operation and design*

In the electronic context, purchase intentions are influenced by several factors related to the information system, such as website quality, web page design, and display of product information. In addition, visual attention is a key element in the process of buying clothes or choosing a meal, gradually shaping emotional perception, and ultimately making the decision to buy or order. (Chaves, et al., 2022)

The performance of food delivery apps and the quality of products and services affect customer satisfaction. (Rowland, 2022) A service with an easy, fast, and clear way of ordering will be more popular. Also, a service with smooth operation without glitches and errors will be more in demand and will inspire more trust.

- *Security and trust*

The growing activity of Internet users, including e-commerce consumers, requires a high level of security and a flexible payment system that supports cross-currency payments. (Gu, et al., 2021)

However, ordering goods or food online requires consumers to spend a lot of time searching for the goods or products they want, researching the chosen website and deciding whether to trust it or not. Many customers are afraid of being cheated by online scammers, so reviews from other users and the promotion of the chosen store are very important for them. Trust in the store arises after the buyer buys the goods based on clear expectations. The same applies to online food ordering services when the customer has to enter his personal data or his bank card details. Many people are still wary of linking their bank card to the OFDS.

Online retailers try to encourage new consumers to visit their online stores and buy their products and services by actively promoting themselves on social media. (Chaves, et al., 2022) However, many consumers buy goods and services from established online stores for reasons such as justified trust and product satisfaction. In order to attract new customers, stores need to create a favorable and safe environment for them, such as shipping costs, good customer service, no return issues, privacy, ability to touch and feel the product, fast delivery, etc.

On the issue of OFDS operation, the same trend continues, people prefer to order food from the same place or from a place recommended by their friends or family members. In order

to gain people's trust, the service needs to establish itself well and constantly advertise and promote itself on social media. Because a service that is constantly on the rumor mill is more likely to inspire more trust.

- *Enjoyment of the process*

Another interesting factor in influencing customer behavior is the pleasure of the process. It can also refer to the aesthetic and experience-based pleasure derived from the whole process of deciding whether to purchase a service or a product. (Yeo, et al., 2017) Ordering food may become a ritual or tradition for many people, they may experience pleasure in the process and receive positive emotions, which will also influence the frequency of ordering.

3.6 Related studies

The sphere of food delivery through various online services is in an active stage of development in Kazakhstan, so a small number of studies on this topic have been written. Below are two of the largest and most informative studies on online food delivery services in Kazakhstan:

1. In November 2019, the financial and economic magazine Forbes Kazakhstan published an article on the topic: "Eat is served. What an online food delivery services are developing in Kazakhstan".

The article tells us that at the time of the study, OFDS had not yet begun to enjoy great popularity among citizens. An important indicator characterizing the state of this market at the end of 2018 is the ratio of the number of users to the population. In Kazakhstan, it amounted to only 3%, when the world average is 15%. According to the researcher's calculations, the average Kazakhstani user makes only four food orders per year, usually for holidays or corporate events.

According to ChocoFood, the largest dedicated food delivery platform at the time, the service has grown 42% in completed orders since the beginning of 2019 compared to 2018. They estimated that the market is growing by 20% every year. The platform also provided data on the average age of the customer of online food delivery services - it amounted to 18-35 years old.

The main criteria for choosing an online food delivery service according to the author of the article are - speed and convenience. Services are working on reducing delivery time, collecting, analyzing data, and developing a user-friendly interface so that customers can place an order in two or three clicks.

According to the author of the article, the main reasons why Kazakhs are less actively mastering OFDS is the income level of the population and established traditions of home cooking, especially for representatives of older generations.

The author of the article pays special attention to an interestingly developing segment - ordering food via Instagram. Its share for 2019 is insignificant and amounts to about 2.4%, but the number of users choosing this channel is growing.

(Reznik, 2019)

2. The second major study on the given topic was published in July 2023 by digital marketing service Go Ahead, which released a major study on ready-to-eat food and grocery delivery apps in Kazakhstan.

The study shows that OFDS have gained significant popularity over the past few years. According to the results of the study, already 20% of the population of Kazakhstan use ready meal delivery services. And the market in 2022 compared to 2021 grew by 26%.

The study notes that most of the respondents who took their survey are not in the habit of ordering ready-to-eat food at home, and if they order, then for a few people a few times a year and at weekends or on holidays.

The main problem and discouraging factor for customers is the high cost of delivery. And the main criterion for choosing an online food delivery service is the speed of delivery.

On the figure below you can see which OFDS the interviewees prefer to use most often: in the first-place mobile applications - 56%, followed by orders through websites - 31% and 25%, 22% of people order through a phone call, and 12% of people order through social networks and messengers.

Prepared food ordering channels

Channel	Percentage
In the mobile application	56%
On the website (via computer/laptop)	31%
On the website (via smartphone browser)	25%
Via call	22%
On social networks/bot	12%
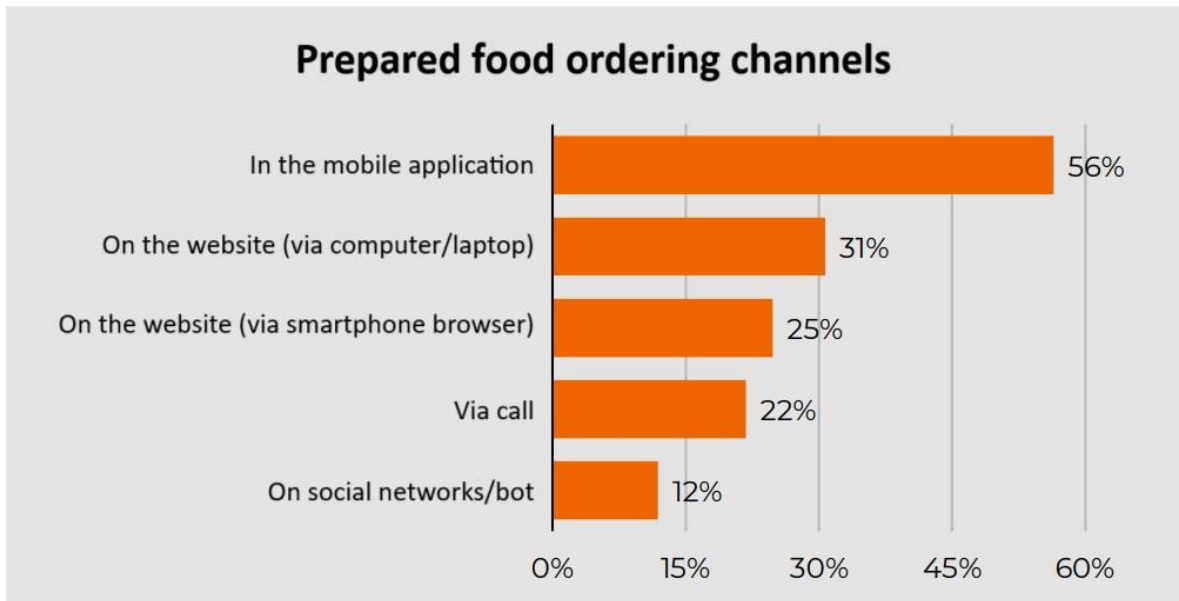
Source: Go Food: Study of applications for the delivery of ready-to-eat food delivery applications in Kazakhstan, 2022. (Ahead, 2023)

The figure below shows the number of special platforms for food delivery and their distribution by large and small cities of Kazakhstan. Most of the services operate in Astana, Almaty, and Pavlodar - 7, then in regional centers of the country - 6.

Figure 4 Dissemination of specialized online food delivery platforms in Kazakhstan.

The top 3 most popular specialty food delivery platforms according to the results of this study were: 1st place - Yandex Food, 2nd place - Glovo, 3rd place - Wolt.

(Ahead, 2023)

3.7 Summary of main findings

This literature review is written to analyze the current food delivery market in Central Asia and Kazakhstan, which is in an active stage of development. The main impetus for its development has been quarantine restrictions and active digitalization of the country.

In addition to analyzing the market, the first part of the literature review presents general information about the Republic of Kazakhstan: information development of the country and briefly outlines the main features of Kazakh people and their mentality in the vision of business. From which it became clear that Kazakhstan is pursuing an active policy of introducing information technologies into the everyday life of its citizens, in order to improve and simplify the realization of everyday tasks.

The second part of the literature review discusses general information about online food delivery services around the world and Asia: existing types of services and principles of their work. This section emphasizes the promising development and implementation of OFDS in people's daily lives.

The third part of the literature review explores the use of social media to promote and implement food delivery. Research has shown that the demand for this type of delivery was particularly strong during the pandemic, allowing many restaurants and cafes to continue their work even under severe restrictions.

The fourth part of the literature review shows the online food delivery services used in Kazakhstan, which are divided into 3 main groups: special online platforms for food delivery, own mobile applications and websites of restaurants, cafes and stores, and ordering and delivery of goods using Instagram and WhatsApp.

The fifth part of the literature review discusses the main factors influencing consumers' preferences and behavior in using OFDS, such as external factors, previous experience, price

saving orientation, speed and efficiency, service operation and design, security and trust, enjoyment of the process.

The literature review concludes with two major studies on OFDS in Kazakhstan, which show that OFDS are not yet very popular among Kazakhs compared to other countries, but this sector has great prospects.

4 Practical Part

4.1 Research Question and Research Design

The main research question of this bachelor's thesis is to understand the attitudes and preferences of Kazakhs towards online food delivery services and what factors influence their behavior, to identify the peculiarities in the choice of online services, to highlight the problems and propose ways to solve them.

Attitudes and preferences towards online food delivery services are formulated based on the opinions of two distinguished groups: buyers and suppliers. A two-stage online questionnaire was developed and distributed for Kazakh consumers, and for Kazakh suppliers - questions asked in the format of an online interview. The survey is conducted in an online format, the respondents are a random sample of people living in Kazakhstan.

After collecting the necessary information, the data is analyzed, and based on the results obtained, common features in the attitudes and preferences of Kazakhstanis towards online food delivery services are highlighted.

4.2 Data Collection

Collecting information in this paper is one of the key actions to answer the main research question and to fulfill the objectives.
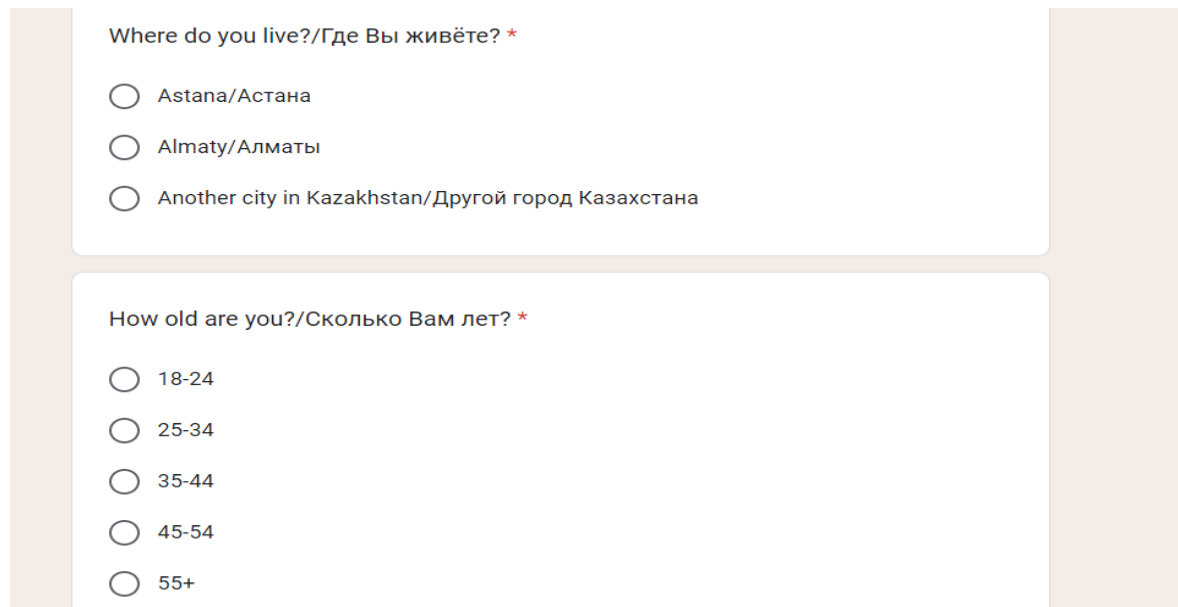
4.2.1 Questionnaire Survey of Kazakh customers

The first stage of information collection is based on the creation and distribution of a two-stage questionnaire. The questionnaire was designed and developed in such a way that it was clear and simple for ordinary customers who are not familiar with the topic of online food delivery services. Google Forms was used as the platform to create and distribute the questionnaire. The questionnaire distribution and data collection were conducted in October 2023. The link to the questionnaire was distributed through various social media and messengers. The approximate number of respondents covered was 200 out of which 150 respondents gave a response. The questionnaire consists of two parts: the first part - 22 closed questions, the second part - 7 open questions.

The questionnaire was distributed in Russian to a random sample of Kazakhs of different ages and living in different cities of Kazakhstan, who voluntarily agreed to participate in the study. All questions and answer options are presented in English and Russian. Below is a fragment of the developed questionnaire:

Figure 5 Sample of questionnaire format

Where do you live?/Где Вы живёте? *
- ◯ Astana/Астана
- ◯ Almaty/Алматы
- ◯ Another city in Kazakhstan/Другой город Казахстана

How old are you?/Сколько Вам лет? *
- ◯ 18-24
- ◯ 25-34
- ◯ 35-44
- ◯ 45-54
- ◯ 55+

Source: author.

4.2.2   Interview with Kazakh suppliers

The second stage of information collection is based on creating and conducting a survey in interview format among employees and owners of small and medium-sized businesses in Kazakhstan operating in the field of restaurants, cafes, and food stores. The interview touches on the personal experiences of the interviewees and their personal attitudes towards different OFDSs in Kazakhstan. Interviews and data collection were conducted in September 2023, 30 respondents agreed and provided the answers. The interview consists of 10 open-ended questions and was conducted in an online format via WhatsApp messenger.

Invitations to participate in the interview were sent out to many different restaurants, cafes and store owners via WhatsApp, whose contacts were taken from the official Instagram page and official websites of the restaurants, cafes and stores. After voluntary consent, each participant was interviewed and recorded in Russian.

4.3 Data Preparation

The study has collected a large amount of information, so the next important step is the processing and preparation of the obtained data, namely converting the data into a format that is easy to analyze.

4.3.1 Questionnaire Survey of Kazakh customers

People living in Kazakhstan mostly speak Kazakh and Russian, so both parts of the questionnaire were created and distributed in Russian. However, all survey questions were also duplicated in English. After obtaining the necessary information, all questions and answers were fully translated into English and converted into a single Excel database. Below is a part of the resulting database:

Figure 6 Sample of Results of Questionnaire.

Where do you live?	What online food delivery services do you use most often?	How old ar	Do you us
Almaty	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	45-54	Yes
Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	25-34	Yes
Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Another city in Kazakhstan	Own websites of restaurants, cafes and shops	18-24	Yes
Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	45-54	Yes
Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
Almaty	Own mobile applications of restaurants, cafes and shops	18-24	Yes
Almaty	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	45-54	Yes
Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	25-34	No

Source: author.

4.3.2 Interview with Kazakh suppliers

The interviews were conducted in Russian and were pre-recorded, so all responses were converted to text and then translated into English before analyzing the results. After that, the interviews were processed and the most interesting answers, in the author's opinion, were combined and included in this paper.

Below is an excerpt from the interview in Russian (the English version of the excerpt is presented in the paragraph "Results of interviews with Kazakhstani suppliers":

Figure 7 Excerpt of the interview in Russian.

"Мы запустили свой сайт, но он просуществовал недолго, на этом наш опыт в сфере онлайн-сервисов доставки еды закончился, сошел на нет и закрылся. Возможно, в нашей компании не хватало специалистов для этого".

"К нам обращались готовые платформы по доставке еды, но у них очень высокий процент, они берут 20 % за доставку. Для нас это очень много, мы бы работали в ноль, а то и в минус. Это был главный критерий, почему мы им отказали".

"Отсутствие доставки не мешает развитию бизнеса, потому что все последние новости и информацию мы публикуем на нашей странице в Instagram. Если у покупателей возникают вопросы, они могут позвонить нам, и мы с удовольствием на них ответим".

Source: author.

4.4 Data Analysis

The next important stage of the practical part of this work is to analyze the obtained and processed data.

4.4.1 Results of first part of questionnaire survey

The results of the first part of the survey are based on the responses of 150 Kazakhs who filled in the questionnaire, of different ages and living in different cities of Kazakhstan.

In the first part of the survey people answered general questions related to their place of residence, age, and delivery usage. The table below summarizes the demographics of the Kazakhs who completed the survey:

Table 3 Demographics of the Kazakhs who completed the survey.

		Where do you live?			
		Astana	Almaty	Another city in Kazakhstan	Total
How old are you?	18-24	9	10	47	66
	25-34	3	0	15	18
	35-44	9	3	27	39
	45-54	1	3	23	27
Total		22	16	112	150

Source: author.

In the questionnaire only 2 cities of Kazakhstan are highlighted because they are the largest and most densely populated, the other cities have approximately the same level of development, so they are collected in one category. There is also an assumption that people living in Astana and Almaty are more advanced in the issue of online delivery and ordering food. (Kosherbaeva, 2018)

84% of responded that they use OFDS and 16% do not use them. 53.3% order food delivery several times a month, 24% several times a year, 14% do not use delivery, and 8.7% of people order food several times a week. As a rule, respondents order ready-made food from restaurants and cafes - 68.7%, in second place are various convenience foods and fast food - 21.3%, in third place are confectionery and baked goods - 13.3%, then come products from supermarkets - 5.3%, the rest of the respondents find it difficult to answer this question, or do not order anything.

The main issue of this thesis is to identify the main attributes that influence the formation of preferences of Kazakhs in the choice of OFDS. It is assumed that age can have a strong influence on people's preferences. This is because older and older people prefer to use services that are already familiar and convenient for them, when young people are open to new fast services.

In Graph 1 we can clearly see that the use of special platforms for food delivery is more popular among people from 18 to 24 years old, people from 25 to 34 prefer to order food via WhatsApp, the age group from 35 to 44 almost equally uses all OFDS, when people from 45 to 54 more prefer to order food via Instagram.

Graph 1 Using of OFDS by Age in KZ.

Using of OFDS by Age in KZ
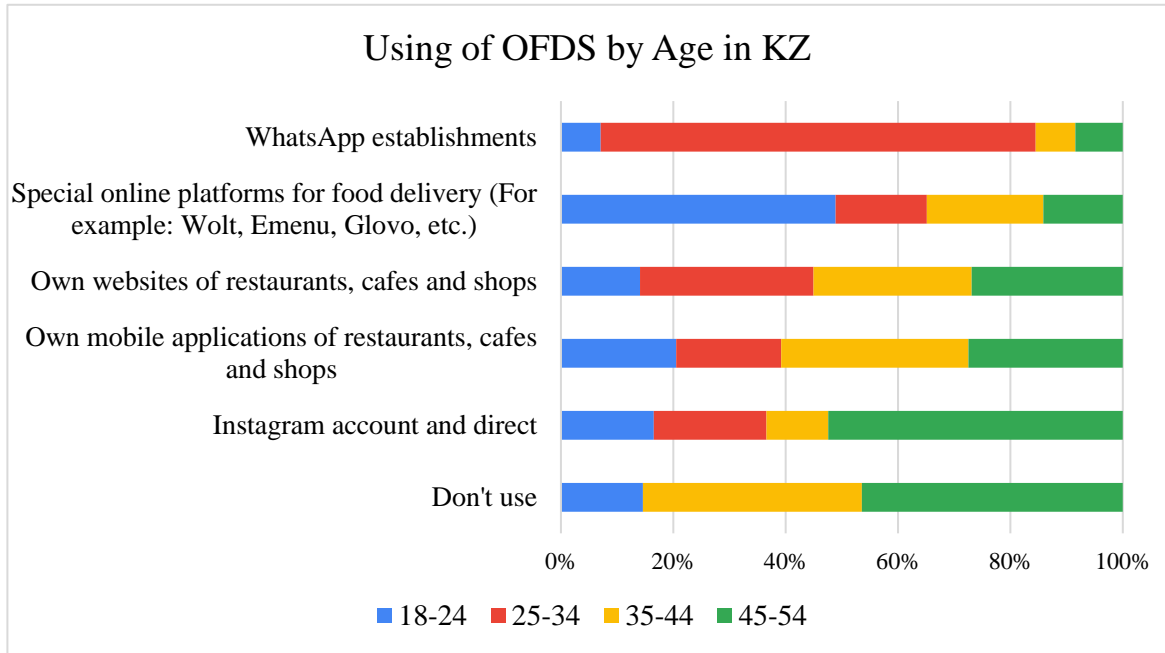
Source: author.

The next important influencing factor is the city where respondents live. As can be seen in Graph 2 below people from Almaty and Astana prefer to use a dedicated food delivery platform to a greater extent. When respondents from other Kazakh cities prefer their own mobile applications of restaurants, cafes, and stores in the first place, and special online platforms for food delivery in the second place.

Graph 2 Using of OFDS by city in KZ.

Using of OFDS by city in KZ

Source: author.

41
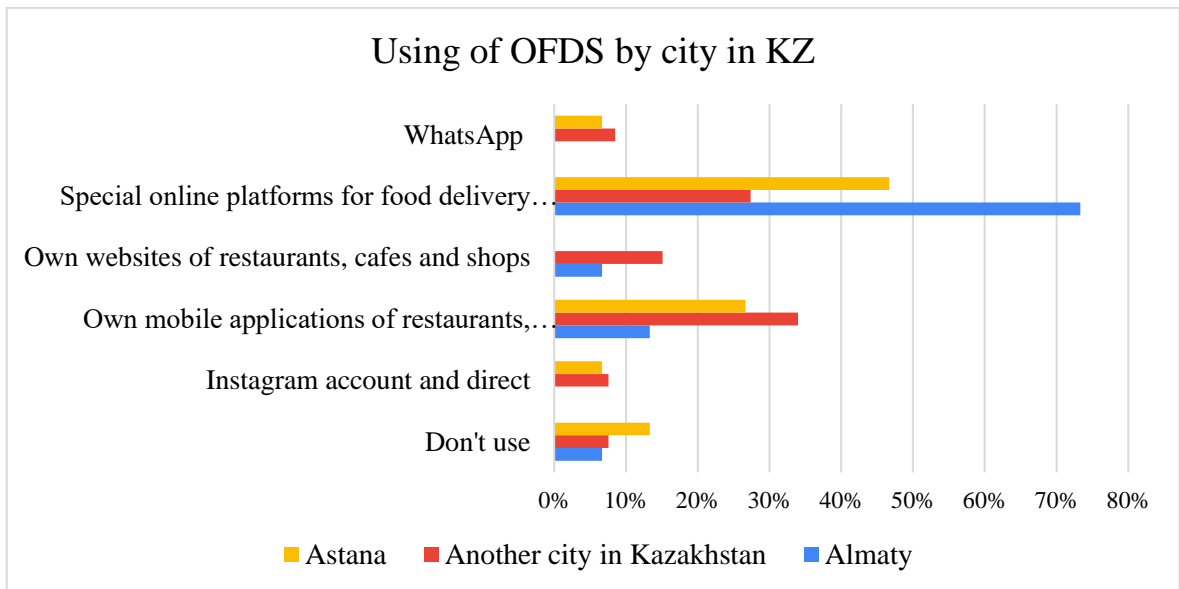
Graph 3 below shows that the most popular OFDS in Kazakhstan are special platforms for food delivery - 34.7%, followed by Owned mobile applications of restaurants, cafes, and stores - 31.3%.

Graph 3 The most popular OFDS in KZ

The most popular OFDS in KZ

Category	Percentage
WhatsApp establishments	7.3%
Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	34.7%
Own websites of restaurants, cafes and shops	11.3%
Own mobile applications of restaurants, cafes and shops	31.3%
Instagram account and direct	6.7%
Don't use	8.7%
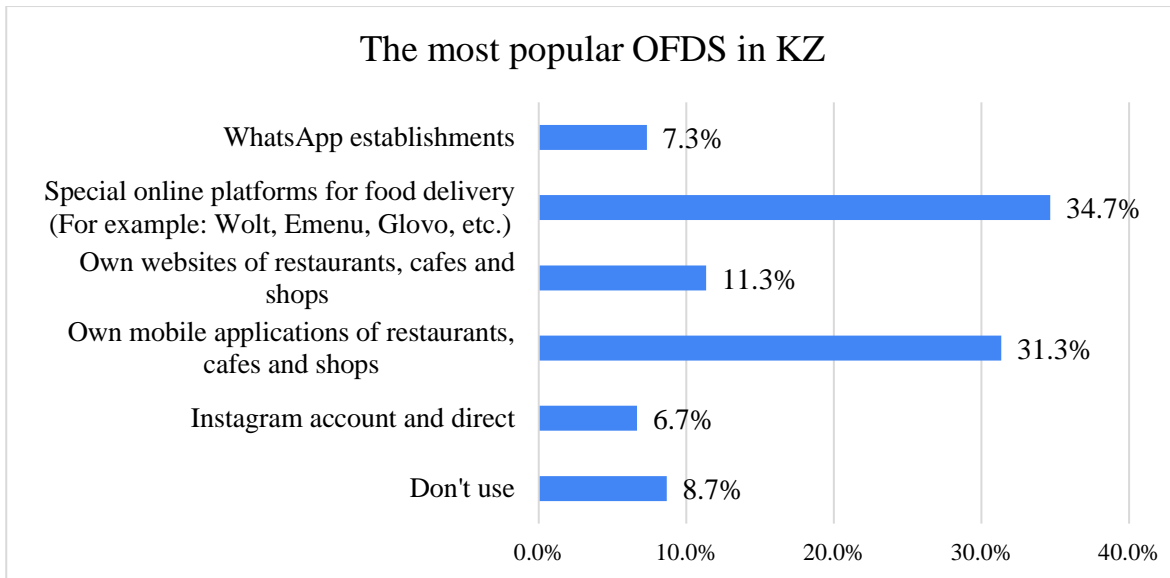
Source: author.

At the moment there are many different special platforms for food delivery in Kazakhstan. Respondents were also asked to choose the most frequently used platform. Table 4 below shows the ranking of the platforms used by the interviewees:

Table 4 Rating of specific food delivery platforms used by respondents.

What specific food delivery platforms do you use?		
1.	Glovo	27.9%
2.	Wolt	21.2%
3.	Don't use	18.0%
4.	Yandex food	13.1%
5.	ChocoFood	8.1%
6.	Other	5.0%
7.	Emenu	3.6%
8.	FoodGo	1.8%
9.	Abr+	1.4%

Source: author.

Glovo platform is in first place, Wolt is in second place, and the answer "I don't use food delivery platforms" is in third place.

4.4.2 Results of second part of questionnaire survey

The results of the second part of the survey are also based on the responses of 150 Kazakhs who filled in the questionnaire, of different ages and living in different cities of Kazakhstan.

In the second part of the survey people were given an opportunity to answer more detailed questions related to their opinions and attitudes towards OFDS. Table 5 below analyzes and summarizes the most common opinions of respondents on the questions asked:

Table 5 Widespread opinions of respondents to the questions of the second part of the survey.

Factors influencing the choice of OFDS according to respondents' opinion	• Convenience • Quickness • Ease of use • Reliability • Ability to communicate and ask questions directly • Availability of promotions and special offers
Factors discouraging people from choosing OFDS according to respondents	• Requesting a large amount of personal data • High delivery prices • Risk of discrepancy between the selected product in the picture and in reality
What problems do respondents face when ordering food	• Long order processing and waiting for a response • Sudden cancellation of an order without explanation • Not completely fulfilled order • Incomplete menu, errors in the description of information about restaurants/cafes/shops • Overloading of the site or applications • Many different applications, but a small number of restaurants/cafes/shops represented in them.
What needs to be changed in the OFDS in Kazakhstan according to respondents	• Set up a food ordering system • Eliminate errors and overloading of applications and websites • Speed up order processing and delivery • Provide more restaurants/cafes/shops in one app

Source: author.

4.4.3 Results of interview with Kazakh suppliers

The interview was conducted with 30 owners and employees of small and medium-sized businesses in Kazakhstan, who work in the sphere of restaurants, cafes, stores and use online food delivery services, or on the contrary do not use them. In the interviews people with different positions and experience were selected, so the research touches on different interesting points of view of suppliers, who will help to investigate the work of services from the inside and talk about their personal opinion on the issue of popularity among Kazakhstanis of various online services for food delivery.

The following interview excerpts are the most key and interesting in the opinion of the author of the paper and are direct quotes from owners and employees working in the restaurant and cafe sector. Each of the interviewees gave their consent to use some personal data about themselves and display it in this paper.

Natalia, owner of a store selling foreign sweets and her own café-candy store. The store has existed since 2015, café-confectionery since 2021, two points are in the city of Pavlodar and one point in the city of Ekibastuz, it is planned to open one point in the city of Astana.

Delivery is not provided. Experience to set up food delivery:

"We launched our own website, but it did not last long, that's where our experience in online food delivery services ended, went down and closed. Perhaps there weren't enough specialists to do it in our company."

"We were approached by ready-made food delivery platforms, but they have a very high percentage, they charge 20% for delivery. That's a lot for us, we would be working at zero, or even minus. That was the main criterion why we turned them down."

"The lack of delivery does not interfere with business development because we publish all the latest news and information on our Instagram page. If customers have any questions, they can call us, and we are happy to answer them."

Madina, General Director of a chain of cafes and pastry shops. The company has been operating since 1995, with two outlets located in Astana, one outlet in Aksu and eight outlets in Pavlodar.

Delivery is carried out through the food delivery platform Glovo, through its own application and website. Experience in using food delivery services:

"Delivery is in demand among our customers, as it helps to save time. It became most active during the pandemic, during this period we developed our own delivery app and website to keep the business running."

"However, after the pandemic ended, ready-made delivery platforms started to develop actively in Kazakhstan, so we decided to cooperate with them. It's easier, no need to find and hire couriers, fast delivery, affordable and convenient app, food delivery in integrity and courteous couriers."

Elmira, Creative Director, and co-owner of a Japanese cuisine restaurant. The business was launched in 2018, work only for delivery in the city of Pavlodar.

Delivery is done through the food delivery platforms Emenu, ChocoFood and Glovo. Orders are also accepted via Instagram and WhatsApp messenger. Experience in using food delivery services:

"We had attempts to create our own courier service and develop our own website, but we faced a number of difficulties. Kazakhstan is now actively developing in food delivery, so we decided to turn to ready-made platforms with an already established courier service system."

"The main disadvantage in cooperation with ready-made platforms is the system of settlements with us, because all payment goes to their platforms and after removing all commissions and interest comes to us."

"Most of all for us it is convenient to cooperate with the Kazakh platform Emenu, because it works only in Kazakhstan due to which we almost never have problems and misunderstandings. Working with larger platforms like Glovo can sometimes be inconvenient because they can be overloaded, which causes problems."

Aliya, director of a restaurant and banquet hall. The business was launched in 2017, one point in the city of Pavlodar.

Delivery is not provided. Experience to establish food delivery:

"We had experience with delivery, it was promoted mainly through Instagram, and we cooperated with a ready-made platform for food delivery. Delivery in general was in demand, people ordered the most during the pandemic, after the pandemic ended there were fewer orders and there were still a lot of delivery costs. The percentage we were paying to the service was high enough for us, so we decided to discontinue delivery."

"It is more profitable to have your own courier service, however our restaurant does not have that experience yet."

Anara, Director, and owner of a fast-food restaurant. The business was launched in 2016, two outlets in Pavlodar city, one outlet in Aksu city.

Delivery is done through its own app and website, but ready-made food delivery platforms Emenu and Glovo are also used. Orders are also accepted via Instagram and WhatsApp messenger. Experience in using food delivery services:

"We are satisfied with working through our own app and website, it is more profitable and convenient. The website was developed for us for free through a special company, to which we pay 2% of the order amount. We try to attract customers there so that they download and order directly from us."

"However, we use ready-made food delivery platforms because they are gaining popularity, new customers come to us from there. For us it is expensive and not profitable, 30% of the order amount goes to the platform. We need to be on the same page as our competitors and attract new customers, so we continue to use these platforms."

"Despite the active development of delivery apps, we still constantly receive orders on Instagram and on WhatsApp, the first place is still orders by phone number, the second through WhatsApp, and then through the app, website and platforms. Because people in Kazakhstan like live communication, they can ask questions, it's part of our mentality."

"Apps are used mostly by young people, those who are older like to call and ask everything and have everything explained to them. It all depends on age and mentality, my husband always calls on the phone and me and the kids have been ordering everything through apps for a long time."

Denis, owner of a chain of pizzerias and a chain of sushi restaurants. The restaurants have been operating since 2019 in the cities of Pavlodar, Kostanay, Ust-Kamenogorsk, Karaganda and Kokshetau. There are physical outlets of the restaurants in the cities, but mostly the establishments specialize in delivery.

Delivery is carried out through their own websites and food delivery apps. Experience in using food delivery services:

"Our establishments are popular with people, so the demand for delivery is increasing every year by about 25%. It's an area in an active stage of development right now, but it has huge prospects in my opinion."

"We didn't develop websites and apps ourselves but turned to a company that created everything for us. We don't pay any interest to the company because we made one large payment and bought the license for the apps and sites. It was the best option for our growing business. However, we are thinking of developing our services from scratch in the future to focus on customer convenience and quick ordering."

"We have our own courier service and for us this is the best option because we specialize mainly in delivery and can regulate all issues completely independently."

Based on the data received, a table with pros and cons of all online food delivery services used in Kazakhstan has been formed below:

Table 6 Pros and cons of the OFDS used in Kazakhstan.

OFDS	Pros	Cons
WhatsApp	1. Free 2. Already known to customers	1. Takes longer 2. Additional employees to communicate with the client
Instagram	1. Free 2. Already known to customers 3. Opportunity to attract new clients	1. Takes longer 2. Additional employees to communicate with the client

Own Food Delivery Website	1. Independence 2. Work directly with customers	1. The cost of creating and maintaining work 2. Requires constant advertising and distribution 3. Create your own courier service
Own Food Delivery App	1. Independence 2. Work directly with customers	1. The cost of creating and maintaining work 2. Requires constant advertising and distribution 3. Create your own courier service
Food Delivery Platform	1. Well-established courier service 2. Ready application or website 3. Opportunity to attract new clients	1. Platform dependency 2. Large percentage of payment from each order 3. Disruptions due to high demand

Source: author.

5 Results and Discussion

In this part of the section, the results of the literature review and practical part are collected and interpreted. In addition, based on the findings, hypotheses regarding various influencing factors on the preferences of Kazakhs in the selection and use of OFDS are formulated and tested.

5.1 Main factors influencing the choice of OFDS

Based on the results of the questionnaires and interviews, the necessary information for the study was collected, a database was created, and a series of questions were compiled, based on which the hypotheses were formulated and tested. The key questions are as follows:

1. Is there a relationship between age category/city where they live and using OFDS among Kazakh respondents?
2. Is there a relationship between age category/city where they live and choice of OFDS among Kazakh respondents?
3. Is there a relationship between age category/city where they live and trust in OFDS among Kazakh respondents?
4. Is there a relationship between how often people use OFDS and trust in OFDS among Kazakh respondents?
5. Is there a relationship between how often people use OFDS and whether it is important for customers to have an Instagram page by restaurant/cafe/shop?

Below is the date base created based on respondents' answers, which is used in hypothesis testing:

Figure 8 Database created based on obtained and processed data from questionnaires and interviews.

	city	ofds	age	using_ofds
1	Almaty	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
2	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
3	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
4	Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
5	Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
6	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
7	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	18-24	Yes
8	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	45-54	Yes
9	Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
10	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	25-34	Yes
11	Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
12	Another city in Kazakhstan	Own websites of restaurants, cafes and shops	18-24	Yes
13	Another city in Kazakhstan	Own mobile applications of restaurants, cafes and shops	45-54	Yes
14	Astana	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	18-24	Yes
15	Almaty	Own mobile applications of restaurants, cafes and shops	18-24	Yes
16	Almaty	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	45-54	Yes
17	Another city in Kazakhstan	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	25-34	No

Source: author.

After forming the date base and hypotheses, the author proceeds to test and verify all hypotheses for relationships and connections between various factors and characteristics based on the respondents' answers from questionnaires and interviews.

5.1.1 First Hypothesis tested

Figure 9 Hypothesis 1 by age.

How old are you? * Do you use online food delivery services? Crosstabulation

			Do you use online food delivery services?		
			Yes	No	Total
How old are you?	18-24	Count	54	12	66
		Expected Count	55.0	11.0	66.0
	25-34	Count	17	1	18
		Expected Count	15.0	3.0	18.0
	35-44	Count	33	6	39
		Expected Count	32.5	6.5	39.0
	45-54	Count	21	6	27
		Expected Count	22.5	4.5	27.0
Total		Count	125	25	150
		Expected Count	125.0	25.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	2.355a	3	.502
Likelihood Ratio	2.767	3	.429
Linear-by-Linear Association	.077	1	.781
N of Valid Cases	150		

a. 2 cells (25.0%) have expected count less than 5. The minimum expected count is 3.00.

Source: author.

H0: there is no relationship between age and using OFDS.

H1: there is relationship between age and using OFDS.

α=0.05 – significance level

Use Chi-square test.

p=0.502

p>α, 0.502>0.05

Answer: H0 –not enough evidence to reject it.

There is no relationship between age and using OFDS. It means that age has no impact on the use of OFDS among Kazakh respondents.

Figure 10 Hypothesis 1 by city.

Where do you live? * Do you use online food delivery services? Crosstabulation

			Do you use online food delivery services?		Total
			Yes	No	
Where do you live?	Astana	Count	18	4	22
		Expected Count	18.3	3.7	22.0
	Almaty	Count	15	1	16
		Expected Count	13.3	2.7	16.0
	Another city in Kazakhstan	Count	92	20	112
		Expected Count	93.3	18.7	112.0
Total		Count	125	25	150
		Expected Count	125.0	25.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	1.401a	2	.496

			1.720	2	.423
Likelihood Ratio			1.720	2	.423
Linear-by-Linear Association			.089	1	.765
N of Valid Cases			150		

a. 2 cells (33.3%) have expected count less than 5. The minimum expected count is 2.67.

Source: author.

H0: there is no relationship between city and using OFDS.

H1: there is relationship between city and using OFDS.

α=0.05 – significance level

Use Chi-square test.

p=0.496

p>α, 0.496>0.05

Answer: H0 – not enough evidence to reject it.

There is no relationship between the city and using OFDS. It means that the city where they live has no impact on the use of OFDS among Kazakh respondents.

5.1.2 Second Hypothesis tested

Figure 11 Hypothesis 2 by age.

What online food delivery services do you use most often? * How old are you? Crosstabulation

			How old are you?				Total
			18-24	25-34	35-44	45-54	
What online food delivery services do you use most often?	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	Count	35	4	10	4	53
		Expected Count	23.3	6.4	13.8	9.5	53.0
	Own mobile applications of restaurants, cafes and shops	Count	17	4	16	10	47
		Expected Count	20.7	5.6	12.2	8.5	47.0
	Own websites of restaurants, cafes and shops	Count	5	3	5	4	17
		Expected Count	7.5	2.0	4.4	3.1	17.0
	WhatsApp	Count	3	6	1	1	11
		Expected Count	4.8	1.3	2.9	2.0	11.0
		Count	3	1	2	4	10

			Astana	Almaty	Another city in Kazakhstan	Total
Instagram account and direct	Expected Count		4.4	1.2	2.6	1.8	10.0
Don't use	Count		3	0	5	4	12
	Expected Count		5.3	1.4	3.1	2.2	12.0
Total	Count		66	18	39	27	150
	Expected Count		66.0	18.0	39.0	27.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	42.618[a]	15	<.001
Likelihood Ratio	36.328	15	.002
Linear-by-Linear Association	10.771	1	.001
N of Valid Cases	150		

a. 14 cells (58.3%) have expected count less than 5. The minimum expected count is 1.20.

Source: author.

H0: there is no relationship between age and choice of OFDS.

H1: there is relationship between age and choice of OFDS.

α=0.05 – significance level

Use Chi-square test.

p<0.001

p<α, 0.001<0.05

Answer: H0 – reject, H1 – not enough evidence to reject it.

There is a relationship between age and using OFDS. It means that age has influence on the choice of OFDS among Kazakh respondents.

Figure 12 Hypothesis 2 by city.

What online food delivery services do you use most often? * Where do you live? Crosstabulation

		Where do you live?			
		Astana	Almaty	Another city in Kazakhstan	Total
	Count	11	11	31	53

What online food delivery services do you use most often?						
	Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)	Expected Count	7.8	5.7	39.6	53.0
	Own mobile applications of restaurants, cafes and shops	Count	6	3	38	47
		Expected Count	6.9	5.0	35.1	47.0
	Own websites of restaurants, cafes and shops	Count	0	1	16	17
		Expected Count	2.5	1.8	12.7	17.0
	WhatsApp	Count	1	0	10	11
		Expected Count	1.6	1.2	8.2	11.0
	Instagram account and direct	Count	1	0	9	10
		Expected Count	1.5	1.1	7.5	10.0
	Don't use	Count	3	1	8	12
		Expected Count	1.8	1.3	9.0	12.0
Total		Count	22	16	112	150
		Expected Count	22.0	16.0	112.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	17.501[a]	10	.064
Likelihood Ratio	21.132	10	.020
Linear-by-Linear Association	1.941	1	.164
N of Valid Cases	150		

a. 8 cells (44.4%) have expected count less than 5. The minimum expected count is 1.07.

Source: author.

H0: there is no relationship between city and choice of OFDS.

H1: there is a relationship between city and choice of OFDS.

α=0.05 – significance level

Use Chi-square test.

p=0.064

p<α, 0.064>0.05

Answer: H0 – not enough evidence to reject it.

There is no relationship between city and using OFDS. It means that the city where they live have no influence on the choice of OFDS among Kazakh respondents.

5.1.3 Third Hypothesis tested

Figure 13 Hypothesis 3 by age.

How old are you? * Do you trust online food delivery services? Crosstabulation

			Do you trust online food delivery services?			
			Yes	No	I find it difficult to answer	Total
How old are you?	18-24	Count	54	1	11	66
		Expected Count	51.9	2.6	11.4	66.0
	25-34	Count	16	0	2	18
		Expected Count	14.2	.7	3.1	18.0
	35-44	Count	29	2	8	39
		Expected Count	30.7	1.6	6.8	39.0
	45-54	Count	19	3	5	27
		Expected Count	21.2	1.1	4.7	27.0
Total		Count	118	6	26	150
		Expected Count	118.0	6.0	26.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	6.595[a]	6	.360
Likelihood Ratio	6.547	6	.365
Linear-by-Linear Association	.912	1	.340
N of Valid Cases	150		

a. 6 cells (50.0%) have expected count less than 5. The minimum expected count is .72.

Source: author.

H0: there is no relationship between age and trust in OFDS.

H1: there is relationship between age and trust in OFDS.

α=0.05 – significance level

Use Chi-square test.

p=0.360

p>α, 0.360>0.05

Answer: H0 – not enough evidence to reject it.

There is no relationship between age and trust in OFDS. It means that age has no influence on trust in OFDS among Kazakh respondents.

Figure 14 Hypothesis 3 by city.

Where do you live? * Do you trust online food delivery services? Crosstabulation

			Do you trust online food delivery services?			
			Yes	No	I find it difficult to answer	Total
Where do you live?	Astana	Count	17	1	4	22
		Expected Count	17.3	.9	3.8	22.0
	Almaty	Count	13	0	3	16
		Expected Count	12.6	.6	2.8	16.0
	Another city in Kazakhstan	Count	88	5	19	112
		Expected Count	88.1	4.5	19.4	112.0
Total		Count	118	6	26	150
		Expected Count	118.0	6.0	26.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	.772[a]	4	.942
Likelihood Ratio	1.409	4	.843
Linear-by-Linear Association	.014	1	.907
N of Valid Cases	150		

a. 5 cells (55.6%) have expected count less than 5. The minimum expected count is .64.

Source: author.

H0: there is no relationship between city and trust in OFDS.

H1: there is relationship between city and trust in OFDS.

α=0.05 – significance level

Use Chi-square test.

p=0.942

p>α, 0.942>0.05

Answer: H0 – not enough evidence to reject it.

There is no relationship between the city and trust in OFDS. It means that the city where they live has no influence on trust in OFDS among Kazakh respondents.

5.1.4 Fourth Hypothesis tested

Figure 15 Hypothesis 4.

How often do you use online food delivery services? * Do you trust online food delivery services? Crosstabulation

| | | | Do you trust online food delivery services? | | | |
			Yes	No	I find it difficult to answer	Total
How often do you use online food delivery services?	Few times a week	Count	13	0	0	13
		Expected Count	10.2	.5	2.3	13.0
	Several times a month	Count	72	0	7	79
		Expected Count	62.1	3.2	13.7	79.0
	Several times a year	Count	30	0	6	36
		Expected Count	28.3	1.4	6.2	36.0
	Don't use	Count	3	6	12	21
		Expected Count	16.5	.8	3.6	21.0
	Every day	Count	0	0	1	1
		Expected Count	.8	.0	.2	1.0
Total		Count	118	6	26	150
		Expected Count	118.0	6.0	26.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	79.800[a]	8	<.001
Likelihood Ratio	66.517	8	<.001

Linear-by-Linear Association	40.917	1	<.001
N of Valid Cases	150		

a. 9 cells (60.0%) have expected count less than 5. The minimum expected count is .04.

H0: there is no relationship between how often people use OFDS and trust in OFDS.

H1: there is relationship between how often people use OFDS and trust in OFDS.

α=0.05 – significance level

Use Chi-square test.

p<0.001

p<α, 0.001<0.05

Answer: H0 – reject, H1 – not enough evidence to reject it.

There is a relationship between how often people use OFDS and trust in OFDS. It means that trust in OFDS has influence on how often people use OFDS among Kazakh respondents.

5.1.5 Fifth Hypothesis tested

Figure 16 Hypothesis 5.

Do you use online food delivery services? * Is it important for you to have an Instagram page for an establishment? Crosstabulation

			Is it important for you to have an Instagram page for an establishment?		Total
			Yes	No	
Do you use online food delivery services?	Yes	Count	104	21	125
		Expected Count	97.5	27.5	125.0
	No	Count	13	12	25
		Expected Count	19.5	5.5	25.0
Total		Count	117	33	150
		Expected Count	117.0	33.0	150.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	11.818a	1	<.001		
Continuity Correctionb	10.070	1	.002		
Likelihood Ratio	10.280	1	.001		

Fisher's Exact Test				.002	.001
Linear-by-Linear Association	11.739	1	<.001		
N of Valid Cases	150				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 5.50.

b. Computed only for a 2x2 table

Source: author.

H0: there is no relationship between how often people use OFDS and having an Instagram page.

H1: there is relationship between how often people use OFDS and having an Instagram page.

α=0.05 – significance level

Use Chi-square test, because 0 cells have expected count less than 5 and n>40.

p<0.001

p<α, 0.001<0.05

Answer: H0 – reject, H1 – not enough evidence to reject it.

There is a relationship between how often people use OFDS and having an Instagram page. It means that having a restaurant/café/shop page on Instagram has influence on using OFDS among Kazakh respondents.

5.1.6   Interpretation of results

The hypotheses tested were formed based on the information studied in the literature review and interpreted for the situation in Kazakhstan.

Table 7 Results of Hypothesizes tested.

Hypothesizes		Result
Hypothesis 1.	Is there relationship between age category and using OFDS among Kazakh respondents?	NO
	Is there relationship between city where they live and using OFDS among Kazakh respondents?	NO
Hypothesis 2.	Is there relationship between age category and choice of OFDS among Kazakh respondents?	YES
	Is there relationship between city where they live and choice of OFDS among Kazakh respondents?	NO
Hypothesis 3.	Is there relationship between age category and trust in OFDS among Kazakh respondents?	NO
	Is there relationship between city where they live and trust in OFDS among Kazakh respondents?	NO
Hypothesis 4.	Is there relationship between how often people use OFDS and trust in OFDS among Kazakh respondents?	YES

Hypothesis 5.	Is there relationship between how often people use OFDS and whether it is important for customers to have an Instagram page by restaurant/cafe/shop?	YES

Source: author.

Of the 5 hypotheses presented above, only 3 were not rejected:

   - Age category does influence the choice of a particular food delivery service among the interviewed Kazakhstanis.

This is because special platforms for food delivery are preferred by young Kazakhstanis, when the older generation uses services already known to them, such as Instagram and own applications of restaurants and cafes.

   - Trust in OFDS affects the frequency of use of the presented services for food delivery among the interviewed Kazakhstanis.

Many Kazakhstanis are still distrustful of some food delivery services, so they prefer to eat homemade food. However, people with an already formed attitude towards OFDS practice more frequent orders, especially on holidays and weekends.

   - Having an Instagram page at a restaurant, cafe or store may encourage customers to order delivery from there more often.

Kazakhstanis are active users of social networks, so they often subscribe to their favorite restaurants and cafes on Instagram or other social networks. Local establishments often publish on their page's current promotions and special offers, which often encourage customers to order something with additional benefits for them.

The other hypotheses rejected were:

   -Age category and the city in which the customer resides do not influence the use of OFDS among the interviewed Kazakhstanis.

This is because people in Kazakhstan have high Internet activity, so most people use OFDS regardless of age and city of residence.

   - The city in which the customer resides does not influence the choice of a particular service for food delivery among the interviewed Kazakhstanis.

Digitalization is well developed in Kazakhstan, so the awareness of citizens increases every year higher and higher, regardless of the city in which they live. This is due to the great interest of the government in the informational development of citizens.

-Age category and the city in which the client resides do not affect the confidence in the use of OFDS among the interviewed Kazakhstani citizens.

As mentioned above, Kazakhstanis have almost the same information awareness throughout the country, regardless of age and city. Their trust is usually more influenced by personal experience and the experience of their friends and acquaintances.

5.2 Discussions

The research results obtained by the author have slight differences from the results obtained by other authors of similar studies.

A 2019 Forbes study calculates that the average Kazakhstani user makes only four food orders per year, typically for holidays or corporate events. However, a study conducted by the thesis author in 2023 shows that the use of OFDS has increased from a few times a year, to several times a month. This could be because over the years and due to the global pandemic, Kazakhstanis have become more active in OFDS and have changed their food ordering habits.

In a study by GoAhead team, the top 3 most popular specialized food delivery platforms were: 1st place - Yandex Food, 2nd place - Glovo, 3rd place - Wolt. When the author of the paper has different statistics: 1st place - Glovo, 2nd place - Wolt, 3rd place - Yandex Food. This may be due to the limitations of both studies as both studies are based on a random sample of interviewees.

In addition, both studies claim that the city of residence affects the choice and use of OFDS among Kazakhstanis, when the author of the paper did not identify any relationships and dependencies between these factors.

5.3 Main issues identified and Recommendations

After analyzing all the information received, the following problems and recommendations in OFDS in Kazakhstan were highlighted:

1. Slower development of new online food delivery services due to low trust among Kazakhstanis.

Many Kazakhstanis, usually of older generation, are more difficult to master new online food delivery services, due to low trust in them and prefer to use already familiar services. In addition, the majority of Kazakhstanis prefer to pay for their orders in cash or by card upon receipt, due to the lack of trust in their bank data services. Social networks have a great influence on the formation of opinions of Kazakhstanis, so the author proposes to launch advertising programs in social networks, proving the safety of new OFDS.

2.   High prices for using special online platforms like Wolt and Glovo.

Most of the interviewed small establishments and companies faced disadvantageous for them high interest payments to international platforms and had to refuse to provide delivery. There are many international and local OFDS in Kazakhstan. The author proposes to strengthen the development of local platforms, which charge less interest, unlike international platforms, by launching profitable promotions and advertising programs when using them.

3.   High delivery prices from restaurants, cafes, and stores.

Many customers have faced high prices for food delivery, or the high minimum order value set by the services. The main reason for expensive delivery is gasoline costs because most deliveries are made exclusively by car. In some parts of Kazakhstan, delivery can only be done by car due to weather conditions. The author suggests introducing pedestrian couriers and couriers on bicycles to reduce delivery costs during good weather conditions.

4.   Periodic disruption in the operation of the OFDS.

Customers and suppliers report periodic failures in the work of OFDS and explain it by heavy workload, or lack of qualified specialists to eliminate these errors. In Kazakhstan, many I.T. specialists are working to improve government and banking information technology. The author suggests hiring more specialists to improve the services.

5.   Infrequent practice of ordering food delivery among customers.

Kazakhstani people prefer to order food delivery mainly on holidays and weekends because of the high culture of home cooked food. Home food culture is part of the Kazakhs' mentality,

so it may be difficult to change the cultural characteristics of the population and increase the ordering of meals from restaurants. The author suggests that the food delivery system from supermarkets and grocery stores should be developed more strongly.

6.   Additional funding for operators who call customers back and process the order.

An interesting feature of OFDS in Kazakhstan is the presence of operators who call customers back to clarify the details of the order, even if the order was placed through a mobile application or a special platform. Most Kazakhstanis prefer to receive feedback from operators after ordering food because of their mentality. However, this is costly. The author suggests adding an additional option during order placement: "please call me back to clarify details" and "please do not call me back" so that operators do not call back all customers.

5.4   Research limitations

This study has its limitations. One limitation is that the present results are obtained by analyzing a random sample of Kazakhstani people's opinions. The number of respondents amounted to only 150 people, so these conclusions are based solely on the opinions received. In a rapidly changing environment, consumer behavior and priorities also tend to change. The more respondents participate, the more accurate the results will be.

Moreover, the respondents are not evenly distributed across different demographic groups, with the younger demographic segment (44.7% aged between 18 and 24) mostly participating in the study.

In addition, this area is in an active stage of development, so few studies on this topic in Kazakhstan have been released. Also, the author did not find any studies and research papers related to Central Asia, but the literature review included studies of Asia in general.

6 Conclusion

In Kazakhstan, as in the rest of the world, great attention is paid to digital advancement in various spheres of people's lives. The level of digitalization of the country already now has a high level and great prospects. However, online food delivery services in Kazakhstan have less dynamics of development and popularization among citizens, compared to online government and online banking.

The main purpose of this bachelor thesis was to find out the attitudes and preferences of Kazakhstani citizens towards online food delivery services. The theoretical part of the study showed that age group, trust in the service, convenience, speed, and past experience are the key factors influencing the preferences and behavior of Kazakhstanis. In the practical part of the study confirmed the influence of age and trust on the use of OFDS, in addition, it was highlighted that social networks also shape the opinion of Kazakhstanis.

Interestingly, according to the results of the study, the city of residence does not affect the availability of services and awareness of customers, when the age group has a greater influence on the choice of OFDS. In general, people living in Kazakhstan have a positive attitude towards OFDS, but some cultural characteristics, such as a high culture of home-cooked food, have an impact on the development of these services.

This study has identified several problems in the current situation of services in Kazakhstan, namely: slow development of new online food delivery services due to low trust in them among Kazakhstani people, high prices for using special online platforms such as Wolt and Glovo, high prices for delivery from restaurants, cafes and stores, periodic disruptions in the operation of OFDS, infrequent practice of ordering food delivery among customers and additional funding for operators to call customers back and process the order. Most of the problems arise due to the peculiarities of doing business in Kazakhstan, mentality, cultural preferences, and peculiarities of the country.

Even though the active development of OFDS in Kazakhstan was during the pandemic period, the habits of consumers have already undergone changes, so these services will remain and will be stronger in the future. Online food delivery services in Kazakhstan have great prospects and will gradually reach a better level, but for this purpose it is necessary to provide favorable and favorable conditions for both large chains of restaurants and

supermarkets, and for small and young restaurants, cafes, and stores. Therefore, the author recommends conducting a repeat study of OFDS in Kazakhstan in 2 years.

The importance of developing this sector lies in the fact that services for online food delivery can help to grow the catering sector and bring it to a new level, which will work effectively in both offline and online formats.

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8 Appendix

8.1 First part of questionnaire survey

1.   *Where do you live?*

  a) Astana

  b) Almaty

  c) Another city in Kazakhstan

2.   *How old are you?*

  a) 18-24

  b) 25-34

  c) 35-44

  d) 45-54

  e) 55+

3.   *Do you use online food delivery services?*

  a) Yes

  b) No

4.   *How often do you use online food delivery services?*

  a) Every day

  b) Few times a week

  c) Several times a month

  d) Several times a year

  e) Don't use

5.   *What do you order most often?*

  a) Ready meals from restaurants and cafes

  b) Semi-finished and instant food

  c) Food from supermarkets

  d) Unusual food: exotic fruits, foreign sweets, etc.

  e) Confectionery and bakery products

6.   *What online food delivery services do you use most often?*

  a) Own mobile applications of restaurants, cafes and shops

  b) Own websites of restaurants, cafes and shops

  c) Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)

d) Instagram account and direct

e) WhatsApp

7. *What specific food delivery platforms do you use?*

a) Wolt

b) Emenu

c) Abr+

d) Glovo

e) Yandex food

f) FoodGo

g) ChocoFood

h) Don't use

8. *How can an online food delivery platform grab your attention?*

a) Functionality, it is convenient to select your favorite establishment from a variety of presented ones in one application

b) Special offers, discounts

c) Design and ease of use

d) Favorable and fast delivery

e) Lack of direct contact with establishment employees

f) Individuality, I prefer it when my favorite establishment has its own website or delivery app

9. *Which food delivery method do you like best?*

a) Home delivery by courier

b) Pickup at your own expense

c) None, I prefer to eat in the establishment

10. *Where do you most often order food from?*

a) From proven and favorite restaurants, cafes, and shops

b) From restaurants, cafes and shops with competitive prices or discounts on food

c) From restaurants, cafes, and shops with free delivery

d) From restaurants, cafes, and shops with the fastest delivery

11. *Do you trust online food delivery services?*

a) Yes

b) No

c) I find it difficult to answer

12.   *If you order food online, what payment method do you prefer?*

a) By card upon receipt

b) Cash upon receipt

c) Automatic debiting from a card linked to the service

13.   *Do you find online food delivery services convenient?*

a) Yes

b) No

c)   I find it difficult to answer

14.   *Do you have problems ordering food online?*

a) Yes

b) No

c) Sometimes

15.   *Is feedback from the establishment important to you?*

a) Yes, I want to know about all stages of order preparation

b) Yes, I want to chat with a employee and ask questions that interest me

c) No, I prefer to place an order and not communicate with a employee

16.   *How often do they call you back and clarify the details of your order after placing it online?*

a) Always

b) Sometimes

c) Never

17.   *Do you like it when an operator calls you back on your phone to reconfirm your order?*

a) Yes, I am sure that my order is processed correctly

b) Yes, I can find out the details that interest me

c) No, I prefer to do everything in the application, website or messenger

18.   *When using which online food delivery service can the establishment operator contact you?*

a) Own mobile applications of restaurants, cafes and shops

b) Own websites of restaurants, cafes and shops

c) Special online platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)

d) Instagram account and direct

e) WhatsApp

19. *How do you find out about the establishment and how to order food from it?*

   a) On the establishment's Instagram account

   b) On special platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)

   c) From friends and contacts

20. *Do you follow the news and promotions of establishments?*

   a) Yes, on their Instagram page

   b) Yes, on their delivery apps or websites

   c) Yes, on special platforms for food delivery (For example: Wolt, Emenu, Glovo, etc.)

   d) No, I'm not interested in that

21. *Is it important for you to have an Instagram page for an establishment?*

   a) Yes

   b) No

22. *What interests you on the establishment's page?*

   a) Number of subscribers, popularity and reviews

   b) Current promotions and offers

   c) Photos and videos of dishes and food products

   d) Information about the establishment and delivery methods

   e) Not interested in anything

8.2 Second part of questionnaire survey

1. Why do you prefer this online food delivery service?
2. Why do you prefer these platforms for food delivery?
3. Which online service does not inspire confidence in you and why?
4. What do you like about online food delivery services?
5. What don't you like about online food delivery services?
6. What problems are you facing?
7. What would you like to change or improve in online food delivery services in Kazakhstan?

8.3 Interview with Kazakh suppliers

1. What is your name? What company do you work for? What position do you hold in the company? How long have you been working in the restaurant/cafe/food retail industry?

2. What does your company do? How many years has it been in existence? How big is your company? Work is carried out in which cities? How many branches/points does the company have?

3. Does your company provide food delivery services?

4. If yes, has the number of online orders increased over the past few years? How popular and in demand is food delivery among customers?

5. What type of online food delivery service do you use?

6. Why did you choose this online food delivery service? What are the main pros and cons of using it?

7. If you have developed your own applications/websites, what are the main pros and cons of this? Was the money spent worth it? What gave you the idea to develop them?

8. If you use existing platforms for food delivery, are you satisfied with the level of their work? (For example: Wolt, Emenu, etc.) What pros and cons can you highlight in using them?

9. If you use several types of online food delivery services, which one is the most popular? In-house developed applications or websites/ already existing platforms for food delivery (For example: Wolt, Emenu, etc.)/WhatsApp messenger/Instagram and Direct/Other

10. Do you think the delivery sector in Kazakhstan is sufficiently developed? What would you like to change or improve on the part of your distribution company?