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**A SZUPERALKALMAZÁS-SZOLGÁLTATÁSOK POTENCIÁLJA
VIETNÁM DIGITÁLIS GAZDASÁGÁBAN: A GRAB DINAMIKUS
JELLEMZŐINEK ELEMZÉSE, MINT A FOGYASZTÓI HASZNÁLAT
ÉS ELÉGEDETTSÉG FŐ TÉNYEZŐI**

**THE POTENTIAL OF SUPER APP SERVICES IN VIETNAM'S
DIGITAL ECONOMY: EXPLORING GRAB'S DYNAMIC FEATURES
AS DRIVERS OF CUSTOMER USAGE AND SATISFACTION**

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ABSTRACT

Inspired by the growing development of Vietnam's digital economy and specifically super app business model, this dissertation aims to gain a deeper understanding on the operation and developing potentials of super app services in Vietnam, with a particular focus on Grab's dynamic features as drivers of customer usage and satisfaction. By analyzing survey data, this research identifies key factors influencing customer preferences and loyalty in a highly competitive market, where there are many large players providing very similar services. Specifically, convenience, competitive pricing, service diversity are crucial motivators for continued usage of customers. Besides that, the research findings reflect the price sensitivity characteristic of Vietnamese consumers, as users often compare multiple apps to find option with the best price deal. The research results also indicate that Grab maintains a competitive position in the market through its diverse range of services and extensive promotions. Additionally, this paper explores potential areas for Grab to grow, such as investing in environmentally friendly ride options like electric vehicles. These insights provide recommendations for Grab to strengthen its market position and adapt strategically to changing user expectations, which will support Grab's sustainable development as a market leader in Vietnam's digital economy.

CHAPTER 1: INTRODUCTION

The global digital economy in general and in Southeast Asia in particular, has experienced an unprecedented development post COVID-19 pandemic and has reshaped many industries. According to the World Economic Forum (2023), the region's proactive approach to technology is evident, with increasing demand for digital products and services. Notably, internet penetration has doubled in six of the region's largest countries since 2016, namely Indonesia, Malaysia, The Philippines, Singapore, Thailand and Vietnam (World Economic Forum, 2023). Within this rapid evolution, super application has emerged as a distinct phenomenon within the sharing economy landscape (Hasselwander, 2024). To clarify, super apps stand out for providing users various services within one platform, by either integrating multiple functions into a single app or consolidating diverse apps under one brand (Steinberg et al., 2022).

In Vietnam, this super application business model has been applied in a great number of industries from transportation, e-commerce to fintech, entertainment and more. Such fast technology adaptation has contributed to the growth of an increasingly dynamic digital economy of the country. Therefore, the rise of super apps, for example Grab in Vietnam, presents a compelling research opportunity. To begin with, Grab is a dominant player in Vietnam market with 45% of the market share in 2022 (Statista Market Insights, 2024). Specifically, its integration of many functions offers convenience for customers, which is vital for the country's fast-paced and hectic lifestyle. However, while Grab provides various services including transportation, food delivery, digital payments and more, its impact on the digital economy and consumer behavior remains a topic of interest. This research, therefore, aims to explore Grab's ability to address the evolving needs of consumers and its potentials in Vietnam's growing digital economy.

1.1. Research Motivations

Vietnam's digital economy is rapidly expanding, empowered by increasing internet penetration, mobile phone usage and a much more tech-savvy population. As a Generation Z Vietnamese, I am both extremely proud of and optimistic about this fast-paced development, and I fully support innovative business models that enhance convenience in everyday lives. Among many different emerging business forms within this digital economy landscape, I am particularly

impressed with super apps like Grab, where various services are integrated in one platform. This has undoubtedly brought a new level of convenience and simplicity in service. Having witnessed how super apps from different industries have penetrated the Vietnam market, rapidly expanded their services and transformed customer behaviors, I believe studying Grab's role and potential will offer valuable insights into how super apps are shaping Vietnam's digital economy. Another factor motivating me to conduct this research, is that I believe the finding of this thesis will have practical implications for businesses, particularly in service innovation, customer retention and market expansion. By understanding what motivates customers to use Grab over other apps and how its dynamic features influence satisfaction, this research can help identify which factors are most important for users in an increasingly competitive and innovative market. Lastly, the study can also offer insights into the impact of emerging trends like electric vehicles and sustainability on consumer preferences.

1.2. Research Objectives

The goal of the research is first to explore how super app Grab, which combines ride-hailing services to food delivery, grocery shopping, parcel shipping, digital payments and more, successfully operates and expands its market share in Vietnam market. Specifically, it aims to understand users' perception of Grab services compared to other competitors. Besides that, the research will identify factors that influence user behavior, with emphasis on usage choice, their loyalty level and their overall satisfaction with the platform. Furthermore, the research aims to explore future growth prospects for Grab, including potential growth and development opportunities, as well as obstacles it might encounter.

1.3. Research Questions

The below three research questions will be addressed throughout the completion of this research paper:

- What are the key drivers influencing customer satisfaction and continued usage of Grab's super app services in Vietnam?
- How does the integration of various services within Grab affect user experience and loyalty compared to using separate single-function apps?
- What are the potential challenges and opportunities for Grab to expand its super app ecosystem and further penetrate Vietnam's digital economy?

1.4. Thesis Structure

The thesis will be structuralized into the following chapters.

Chapter 2 is Literature Review. In this chapter, the theoretical foundation for the thesis will be analyzed, beginning with the digital economy and business ecosystems, followed by the evolution and impact of super app services. The theoretical framework will also explore customer perception and behavior in the digital economy, analyzing the factors influencing their usage and loyalty. Then, secondary research on the case study of Grab in Vietnam will be conducted, offering insights into the company's super app ecosystem, services and competitive positioning compared to its existing competitors.

Chapter 3 indicates the research methodology for this thesis, including the design, data collection, participant details and limitations. Specifically, a questionnaire will be introduced, aiming to gain data on customers' usage patterns, satisfaction and recommendations on Grab's features.

Chapter 4 presents the findings, including a demographic analysis, users' motivations for using Grab. In this chapter, conclusions and suggestions will be made, which includes identifying potential opportunities and challenges for Grab's future development.

CHAPTER 2: LITERATURE REVIEW

2.1. Theoretical Framework

2.1.1. *The Digital Economy*

The introduction and expansion of the internet in the mid-1990s has significantly shifted the way the world functions, inspired the creation of new, innovative business models, and all contributed to a new era in human civilization called the Digital Age (Wladawsky-Berger, 2023). When it comes to economic growth, this evolution was specifically addressed as the New Economy, or the Digital Economy. “Certainly information is not new, only the form in which it is gathered, manipulated, stored, and transferred (Carlsson, 2004, p.254)”. This digital economy era is defined as when economic activity is driven by digital technologies and offers digital products or services (Bukht & Heeks, 2018). Additionally, Elder-Vass (2018) emphasizes that modern digital economy has given way to more innovative commercial conducts, where the core spirits lie in a lifeworld economy - empowered by communication, interaction and cooperation, rather than the traditional systems economy - centred on money and power. Also proposed by Bukht & Heeks (2018) in their research, a scoping model of the digital economy can be developed into three phases with substantial developing potential, including the core digital sector (hardware manufacturer, information services, telecommunications, software & IT consulting), the narrow scope of digital economy (digital services, platform economy), and the broad scope of a digitalized economy (e-commerce, industry 4.0, e-business, etc). The impact of this new era is confirmed when Al-kasasbeh (2024) also mentioned in his paper that our modern digital economy has reshaped industries and transformed our business practices and interaction, which opens a new wave of growth possibilities like increased productivity, job opportunities, entrepreneurship and more.

Besides that, considering internet as a key driver empowering this growth, it is also worth noting on its overall global expansion in the past decade. According to DataReportal (2024), the worldwide global internet user penetration between 2014 and 2024 has accelerated significantly, from 35% share of the global population accessed the internet in 2014, to 67% as of April 2024. Notably, during the time of Covid-19 pandemic, internet adoption was highlighted with 1.5 billion more users, bringing the total to 5.3 billion globally, also two-thirds

of the population, by 2022 (World Bank, 2024). The report by World Bank (2024) also provided insights that 2020 lockdowns, the first year of the pandemic, caused a historic surge in internet users (6% or 500 million people) as many activities shifted online. Notably, Southeast Asia is not an exception of this global growth, with the number of internet users skyrocketing during the past ten years and reaching its peak in 2024 with around 584 million users (Statista, 2023).

2.1.2. The Digital Business Ecosystem

The appearance and expansion of the global digital economy initially fueled increasing productivity and efficiency, yet in the long run, the true game-changer approach of this digitalization era will probably be totally new products and services that reshape the future (Carlsson, 2004). And within the developing scope of digital economy, digital business ecosystem emerged as an innovative framework. While the natural ecosystem is a geographic area where living species co-exist and are greatly interdependent to evolve (National Geographic, 2024), its metaphor - the business ecosystem refers to economic factors not as random entity, but rather a community where traditional market boundaries and organization structures are challenged, giving way to more innovative value creation ways (Moore, 1993). To clarify, business ecosystem is a community where players are connected and inter-dependent, thus can gain certain influence over one another, which is a definite change from traditional industry boundaries (Jacobides et al., 2018).

From a strategy point of view, Adner (2016) divides business ecosystem into two concepts, namely ecosystem as affiliation that highlights the interdependence and connection among different market players, and ecosystem as structure where the priority is lied on value maximization. In our modern world, it is indeed that digital business ecosystem is a prominent achievement that transforms how the market collaborate and generate value (Jacobides, 2022). Specifically, Jacobides (2022) argues this transformation is substantially fueled by digitalization, which not only enables innovative rearrangement of activities and fosters the interconnection of firms, but also discontinues conventional regulation boundaries and gives ways to new and more dynamic forms of co-ompetition.

In actualization, a report published by McKinsey & Company (2019) categorizes ecosystem players into four different segments, namely (1) Local Champion - regional leaders in

traditional industries but are now facing efficiency challenges from other digital providers, thus their strategy is partnership with other digital companies to quickly develop updated products; (2) Large Incumbent - prominent player in the traditional market aiming to increase sales by developing cross-selling products, yet they face the risk of losing customers due to the loose focus on the true core products and services; (3) the Digital Start-up - though have initial limited product range, will strategically diversify their portfolios and offers to attract more customers; and (4) the Internet Giant - focus on data infrastructure to develop new core products, their value generation is substantially backed up with strong core products, diverse cross-selling offers and solution-oriented strategic planning.

Also from a strategic viewpoint, Boston Consulting Group (2022) has published an Ecosystem Strategy Framework (Fig.1) that serves as a source of reference for companies aiming to pursue this strategy. Specifically, Boston Consulting Group (2022) advises companies leaders to go through eight important considerations, namely (1) do they have the goals and sufficient resources to take risk and engage to the ecosystem; (2) measure if the market is really attractive and opportunistic, and if yes, will ecosystem be the optimal strategy; (3) where should they position and how should they perform themselves in the ecosystem; (4) to build an ecosystem of their own, what co-ompetitive factors are needed; (5) how can they achieve the competitive advantages in a co-ompetitive environment; (6) how can their values be generated and sustained in their participated ecosystem; (7) as coordinator position is not feasible for all companies, it is important for the participants group to consider how to make the most in that position and how much should they engage; (8) as change is the only constant factor, companies should also consider and plan for their ecosystem evolution in the long run.



Figure 1: BCG Ecosystem Strategy Framework

Source: *What Is Your Business Ecosystem Strategy (BCG Global, 2023).*

2.1.3. Impact of Digitalization on Business Operations and Management

The COVID-19 pandemic has fostered socio-technical and economic changes, promoting businesses to enhance market adaptability through digital transformation and technologies such as AI, which drive innovation and operational flexibility (Perifanis & Kitsios, 2023). Indeed, this digital shift has tremendously reshaped modern businesses' operations, customer engagement and competitive strategy by increasing efficiency, lowering costs and enabling personalized interactions on digital platforms (Agustian et al., 2023). According to Vărzaru & Bocean (2024), as digitalization becomes increasingly vital to business operations, incorporating these technologies into innovation management offers key competitive advantages, facilitating real-time global teamwork and reshaping how modern organizations approach innovation. To survive and thrive in a highly competitive market, businesses must be proactive in adopting Business Model 4.0 - a platform ecosystem focusing on win-win strategies, evolving from earlier industrial models: Industry 1.0's production focus, 2.0's collaborative manufacturing and 3.0's industrial chains (Chen & Huang, 2023).

“Digital technologies, which are fundamentally different from traditional technologies, are driving radical changes across all industries, supply chains, consumer preferences, competition, and more (Zare & Persaud, 2024, p.1)”. Indeed, digitalization spans across diverse aspects of business operations. In marketing, it enables instant customer engagement and co-creation on digital platforms, allowing customers to participate in product development, value creation and strategy formulation, fostering digital marketing innovations (Cham et al., 2022). For manufacturing, digitalization enhances efficiency by optimizing resource utilization, improving workforce productivity and boosting cost management (Tian et al., 2023). Another example is data analytics tools, which play a key role in evaluating employee productivity and work effectiveness, while enhancing communication and task coordination between managers and the team (Mihu et al., 2023).

2.1.4. Super App Service: Evolution and Impact

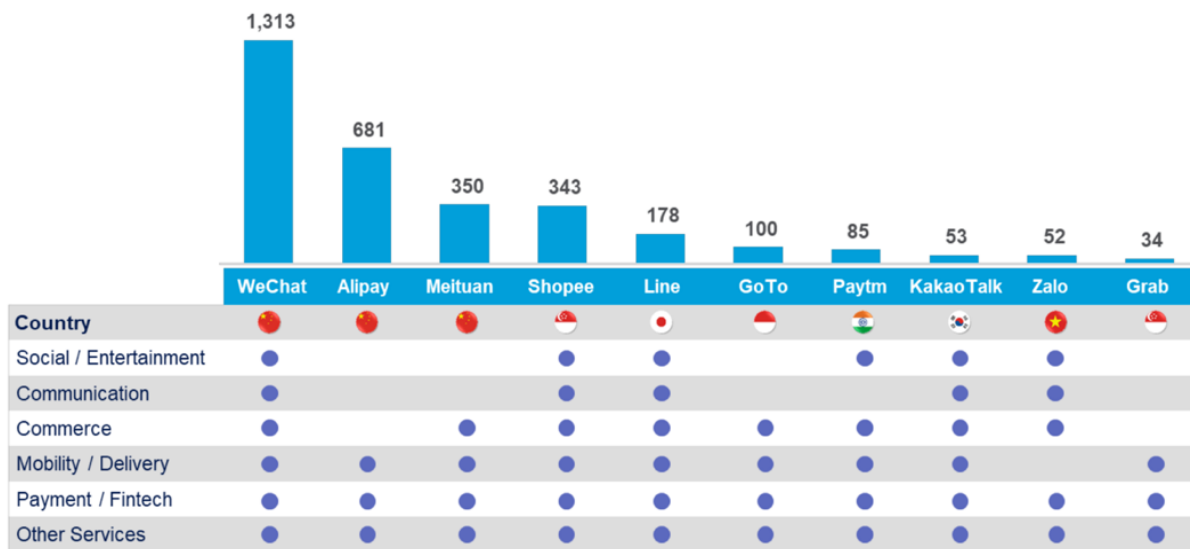
As part of the digital business ecosystem, a disruptive business model called super application appeared. According to Lucas & Lopes (2024), as mobile devices, especially smartphones, become more globally widespread, applications, or apps for short, have become the main communication tool between companies and customers, enabling greater personalization

through user database and giving rise to a new category known as the ‘super app’ - as features and services continue to expand. Specifically, super apps, unlike other single-function apps, offer an ecosystem of separated services now integrated into one platform, aiming to create a seamless user experience for daily tasks like paying rent, grocery shopping, booking a trip, etc (van der Vlist et al., 2024). Indeed, Sandel et al. (2019) emphasize that super app services can be referred to a Swiss Army knife that can virtually handle everything for the user. This development also highlights the utilization of mobile phones and the emerging potential in mobile commerce by presenting a unified platform that enhances customer engagement, which is why the super app model is deemed the ‘future of mobile internet’ (Zhu et al., 2023). Additionally, by storing an extensive amount of customers’ data, super app services can improve customer engagement by personalizing their experiences and offering them with specific promotions (Baquero, 2021). In other words, a comprehensive user profile is built from the vast amount of data collected through the use of various combined services, including both transactional figures like average monthly spending or order frequency and demographic figures such as device usage or number of registered addresses (Acevedo-Viloria et al., 2021).

Super app is experiencing an undeniable growth in today’s world, expanding its reach across an increasingly diverse range of industries and aiming to widely cover people’s daily lives. Notably, according to Future Market Insights (2023), super-apps market value was 78.16 billion USD in 2023 and is projected to go up to 887.30 billion USD in the next decade. Additionally, super apps cumulatively have over 2.4 billion monthly active users, representing one-third of the population worldwide (Dentsu, 2021). Gartner (2022) also predicts that by 2027, over half of the global population will be using multiple super apps in their daily lives, and the concept of super apps will eventually broaden to support corporates’ mobile and desktop practices, including working procedures, virtual teamwork and messaging.

A prominent super app example is WeChat from China, which integrates messaging with payment, entertainment, commerce, delivery, etc (Jia et al., 2022). Another one is UK fintech super app Revolut, which goes beyond traditional finance limits by offering digital banking for users and a platform for businesses to connect with customers (Gartner, 2023). Moreover, according to Citi Global Perspectives & Solutions (2023), in Asia super app operation is very strong and dynamic, with many giants namely Shopee providing communication, e-commerce, delivery, fintech; Zalo with social, communication, entertainment, fintech; KakaoTalk offering entertainment, commerce, fintech; Line with social, communication, commerce, delivery,

fintech features; or Grab with delivery, fintech and many other services (Fig.2). Specifically, in Southeast Asia, Grab stands out as a dominant player, with one in every twenty people order food, ride-hailing service or pay with Grab monthly (Grab, 2022).



Note: Number of users are based on monthly average users (MAUs) as of 2022, unless indicated otherwise. Figures for Meituan, Shopee, Line, GoTo, and Zalo are as of dates in 2021. User numbers for Shopee are based on monthly web visits; those for Paytm and Grab reflect monthly transacting users.

Source: Company Information, Wallstreet Research, Statista, BusinessofApps, Webretailer, Citi GPS

Figure 2: Asian Super Apps Spanning Across Three or More Verticals (millions of users)

Source: *Asia as a Time Machine to the Future (Citi Global Perspectives & Solutions, 2023, p.14.)*

2.1.5. Customer Perception and Behaviour in the Digital Economy

Customers, also referred to as purchasers or buyers, are individuals or entities that can benefit from a company's offerings (Peppers & Rogers, 2011). They are deemed the primary source of revenue for any business, which makes customer base among the most significant assets for any companies (Peppers & Rogers, 2011). Customers play a crucial role in both current and future success by providing a competitive edge, making it essential for companies to find effective ways to serve them and maintain an advantage over competitors (Un & Cuervo-Cazurra, 2009). Therefore, in comparison with other internal and external stakeholders, Khan et al. (2022) believe that clients are more suitable and most capable of providing feedbacks on how well a business meets their demand and expectations, and thus customer perception should always be thoroughly evaluated to optimize the value maximization process of the business.

Customer perception is the clients' thoughts and feelings about a brand's products and services (Keller, 1993). The term also takes into consideration customers' assessment of the quality of the experience and their overall satisfaction level, prompting companies to recognize that they can differentiate themselves through superior service quality and enhanced customer satisfaction (Wilson et al., 2012). "Consumers often form more favourable perceptions of a product with a brand they already feel positive about (Kotler & Keller, 2016, p.153)". Business aiming to achieve positive customer perception also needs to take customer-perceived value (CPV) into careful consideration. Customer-perceived value (CPV) is the gap between the benefits a customer gains and the costs they bear when comparing an offering to other possible options, which marketers can enhance by either increasing benefits or cutting down expenses (Kotler & Keller, 2016).

Specifically, effectively identifying the right customers, understanding their perceptions and working towards maximizing their CPV have a pivotal role to play in boosting customer engagement for brands. Customer engagement is a concept centred on prioritizing the development of strong and lasting relationships with customers (Beckers et al., 2017). Brands can enhance customer engagement by utilizing distinctive and creative activities that evoke the dynamic relationships between private and public clients with themselves and with the brands (Steinhoff et al., 2022). To be more specific, Steinhoff et al. (2022) introduce a partner-audience interaction concept that includes various engagement methods such as feedback questionnaires, word of mouth, social media interactions and online public reviews (Fig 3). Considering the impact and significance of customer engagement, Harrigan et al. (2017) suggest that sustainable and increased customer engagement positively correlate with a brand's growth, as it fosters trust, validation, and ultimately leads to repeat purchases or usage. In today's digital economy where innovative products are in high demand, engaging with customers and gaining insights from their purchasing behaviour is crucial to maximize competitiveness, and the increasing digitization offerings provides companies with opportunities and an extensive customer database for deeper analysis (Micus et al., 2023).

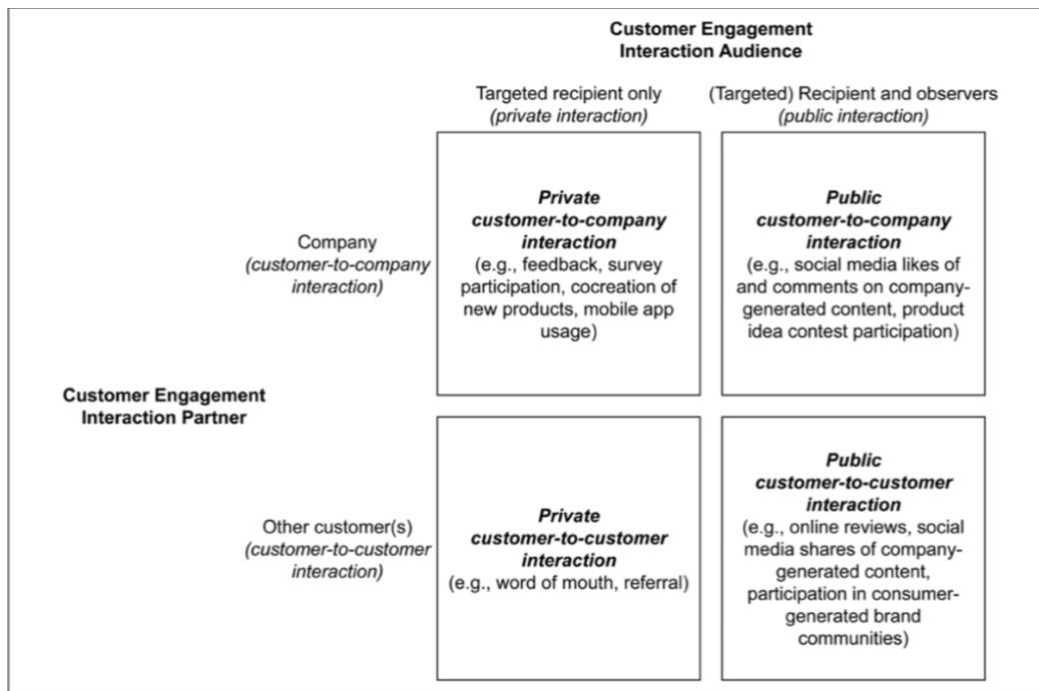


Figure 3: Customer engagement interaction partner and audience.

Source: *Customer engagement in International Markets* (Steinhoff et al., 2022, p.7).

2.1.6. Factors Influencing Customers' Usage and Loyalty

According to Oliver (1999), loyalty refers to customer's strong will and devotion for continuous and repeated purchase of a product or service from a brand, despite the persuasive marketing strategies of competitors that may convince them to switch. Indeed, Cossío-Silva et al. (2016) refer to customer loyalty, whose foundation factors are customer contentment, CPV, overall quality and the co-value-creation relationship between the customers and the brand, as a key intangible property offering competitive advantage for any business. Additionally, "loyal customers are less likely to switch to a competitor solely because of price, and they even make more purchases than non-loyal customers (Trinh & Luu, 2020, p.43)". As a result, higher consumer satisfaction level and stronger customer loyalty value has a direct correlation with increased profits for the company (Rosmadi & Romdonny, 2019).

There are many factors influencing customers' purchase intention and whether they will repeatedly buy the same products from that one brand or not. Rosmadi & Romdonny (2019) highlight three main basic elements deciding on customer's loyalty, namely superior product quality, reasonable pricing and excellent services. Indeed, a buying decision is not just about purchasing a product, but rather customers are seeking the best solutions to their problems.

Thus, companies should carefully assess how their offerings provide optimal value and differentiate themselves from competitors. Besides considering service provider elements as above, Vilkaite-Vaitone & Skackauskiene (2020) suggest that it is also crucial for business to consider customer factors (age, income, socioeconomic status, switching costs, etc.) and environment factors (social support, economic wellbeing, etc.) when it comes to assessing loyalty (Fig 4).

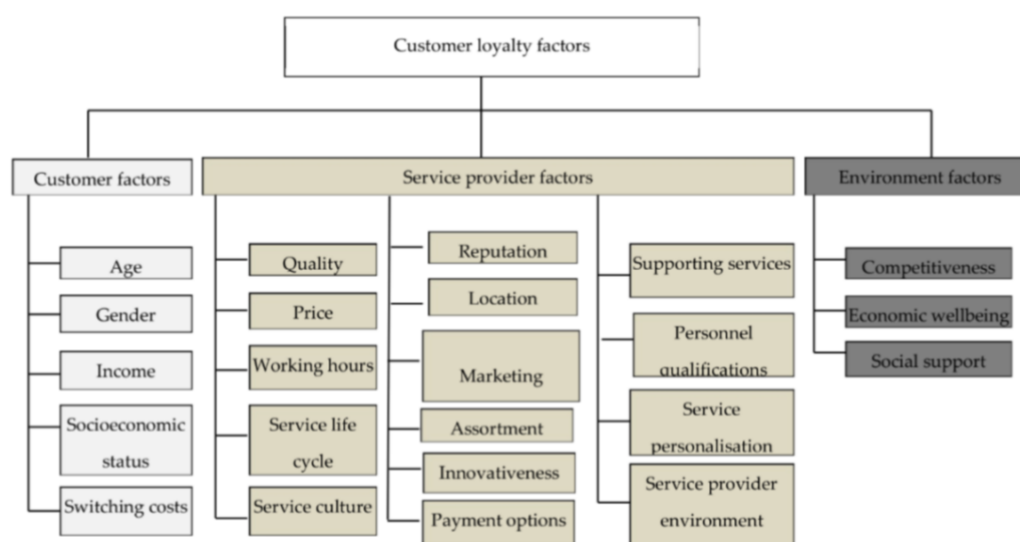


Figure 4: Customer loyalty factors

Source: *Service customer loyalty: An evaluation based on loyalty factors (Vilkaite-Vaitone & Skackauskiene, 2020, p.3)*

In this modern digital economy and business ecosystem landscape, gaining customers' trust and motivating them to purchase repetitively requires constant research, update and product development from brands. According to Rasool et al. (2020), in today's highly inter-connected environment, modern and tech-savvy consumers have transitioned from being solely recipients of information to engaged participants and collaborators in product innovation process. Specifically, when it comes to mobile application - a product of modern digital economy, McLean (2018) demonstrates that factors namely perceived ease of use, perceived usefulness, convenience, enjoyment, customization, engagement, brand attitude and brand loyalty drive continued usage of an application. Additionally, Albayrak et al. (2023) suggest that the overall quality of online services, including simplicity, app design, speed, data accuracy and security, are factors that determines customer engagement and loyalty.

2.2. Case study: Grab in Vietnam

2.2.1. Super App Services in Vietnam

Vietnam is a developing country in the Southeast Asia region with GDP of 465,8 millions of US Dollars in 2024 and a population of 100.770 million people (International Monetary Fund, 2024). Having industrialisation and modernisation (IM) as the heart of its economic growth strategy, the nation is witnessing significant progress and is prepared to adapt to external economic challenges (Fforde, 2016). In this modern digital economy promotion and development landscape, Vietnam is not an exception with increasing attention and encouragement to digital transformation in many industries, from education, communication, transportation to manufacturing. This undoubtedly attributes to the rise of super apps, which offer extensive convenience for the people's fast-paced lifestyles nowadays.

The adaptation of super apps is quite strong in Vietnam. Taking Zalo and MoMo, the two Vietnam-based application focusing on communication and financial services respectively, as examples. Zalo, Vietnam's leading messaging platform, now expanding into digital financial services with ZaloPay, has reached overall 76 million monthly active users (MAU) and 9.6 million MAU for its digital payment service in 2023 (VNG Corporation, 2024). On the other hand, MoMo - the most popular e-wallet and digital financial service provider in Vietnam, has recorded over 30 million active users and more than 140,000 payment points across the nation (MoMo, 2024). Another prominent example is Shopee - a leading e-commerce platform in Southeast Asia in general and in Vietnam in particular, with 76% market share by April 2024 (TMO Group, 2024).

To have a better overview on Vietnam's super app market, Table 1 below shows some prominent existing super applications currently operating in Vietnam across various industries from transportation, communication to e-commerce and financial services.

Industry	Super App	Integrated services	Year Introduced
Ride-hailing & Delivery	Grab	Ride-hailing, food delivery, digital payments, grocery shopping, courier services, ride & travel	2014

		insurances, accommodation booking, sending gift cards.	
	Be	Ride-hailing, food delivery, digital payments, courier services, flight bookings, advertising solutions for businesses.	2018
Communication	Zalo	Messaging, voice calls, group chats, file sharing, social networking, QR payment, news updates, job seeking.	2012
Finance & Payments	ZaloPay	Mobile payments, bill payments, QR code payments, peer-to-peer transfers, e-commerce, finance and insurance, travel bookings.	2016
	MoMo	Digital payments, bill payments, mobile banking, insurance, investment services., e-commerce, travel bookings, gaming.	2014
E-commerce	Shopee	Online shopping, e-wallet, logistics, vouchers, food delivery, gaming, in-app livestreaming.	2016
	TiKi	E-commerce, digital payments, customer rewards.	2010
	Lazada	E-commerce, digital payments, logistics, customer rewards, in-app livestreaming.	2012

Table 1: Super applications in Vietnam across various industries.

Source: Author's own collection from Companies' official websites (Grab, Be, Zalo, ZaloPay, MoMo, Shopee, Tiki, Lazada).

2.2.2. Ride-hailing Services In The Sharing Economy

As a successful industry within the sharing economy business models in Vietnam, Ride-hailing is undeniably a blooming sector, a competitive market with many prominent players (Huynh et al., 2020). To begin with, sharing economy is a peer-to-peer (P2P) exchange of products and other resources, enabled by digital platforms that allows access, sharing and purchase (Hamari et al., 2015). To clarify, while e-commerce refers to the sale and acquisition of products, resulting in ownership, sharing economy focuses on the rental and sharing of available goods (Ganapati & Reddick, 2018). Also according to Ganapati & Reddick (2018), Airbnb and Uber

are the most popular examples of the sharing economy, which enables the sharing of accommodation, transportation and highlights smartphone apps as platforms for service exchange. The ‘rental’ nature of the sharing economy is clearly featured in the two above examples: while Airbnb provides accommodations without owning any houses, Uber operates as a taxi service without owning any vehicles.

During this technology shift within the sharing economy scope, significant opportunities for enhancing more sustainable mobility are introduced, aiming to optimize the operating efficiency of the current transportation networks (Naumov & Keith, 2023). As a result, ride-hailing is a blooming sector not only in Vietnam, but also all over the world. Nguyen & Ha (2022) describe the working mechanism of ride-hailing service in this digital economy landscape as when a customer requests a ride, the ride-hailing digital platform (RHDP) will connect them to the nearest drivers and they can then select the best match. Additionally, ride-hailing services offer distinct advantages over traditional means of transportation, namely convenience, transparency, diverse price options, cost effectiveness, personalization and accountability for both riders and drivers (International Transport Forum, 2016). Indeed, with high flexibility, reliability and affordability, modern ride-hailing services, provided in form of applications like Uber or Lyft, has witnessed unprecedented expansion in the past decade (Hossain & Habib, 2021).

In Southeast Asia region, ride-hailing services, now incorporate with food delivery and many online payment methods, is experiencing an unprecedented growth. Specifically, as of August 2021, Grab held the top position, followed by Gojek, with over 90% of respondents in Malaysia and the Philippines selecting Grab as their most frequently used ride-hailing application (Blackbox Research, 2022). Besides these two dominant players, Southeast Asia also presents a highly competitive market for ride-hailing services and applications with over 20 brands, each having more than 10,000 downloads, operating throughout the region (Chalermpong et al., 2022).

2.2.3. Ride-hailing Services In Vietnam

Vietnam ride-hailing market is a blooming sector, with 18.1 million users in 2023 an estimated market size of USD 0.88 Billion by 2024 (Mordor Intelligence, 2023). The largest players in the market are Grab Holdings, Be Group and Xanh SM - Vietnam's first electric taxi company.

To assess the competitive dynamics of Vietnam’s ride-hailing industry, the Porter’s Five Forces framework will be utilized. First introduced by Michael Porter in 1979, the Five Forces analysis (Figure 5), including Threats of New Entrants, Bargaining Power of Buyers, Threats of Substitute Products, Bargaining Power of Suppliers and Rivalry among Existing Competitors, helps companies evaluate industry competition, assess market trends, decide their competitive advantages and strategically position themselves for success and development (*Harvard Business Review*, 2023).



Figure 5: Porter’s Five Forces

Source: *Porter’s Five Forces Model: Completed Guide with Examples* (Peachyessay, 2022).

Table 2 below indicates a brief analysis of the competitive landscape of Vietnam’s ride-hailing and taxi industries in general, utilizing the Porter’s Five Forces framework.

Porter’s Five Forces	Analysis
Threat of New Entrants	Moderate level. New players can still enter the market, yet this requires vast investment needs, marketing strategy and focus on enhancing brand loyalty.
Bargaining Power of Suppliers	Low level. Drivers can switch easily between platforms and can work for many brands at the same time.

Bargaining Power of Buyers	High level. Customers, who are extremely price sensitive, can easily switch between services, depending on the price and promotions available.
Threat of Substitute Products	Moderate to High level. Public transportation, personal vehicles and traditional taxis offer many alternative options with diverse routes and price ranges.
Rivalry among Existing Competitors	High level. There is intense competition among existing ride-hailing apps namely Grab, Be and traditional taxi services like Mai Linh, XanhSM (exclusively offer only electric vehicles manufactured and supplied by its mother company - Vingroup).

Table 2: Competitive Analysis of Vietnam's Ride-Hailing and Taxi Industries Using Porter's Five Forces

Source: *Author's own analysis*

In summary, the industry is shaped by high customer power and intense competition, with companies needing to continuously innovate and adapt to maintain market share. While new entrants face significant barriers, existing players face a high threat of substitutes and price-sensitive customers who frequently switch between services. Additionally, the bargaining power of suppliers remains low, except in specialized cases like XanhSM, where reliance on electric vehicle infrastructure gives suppliers more power. The fierce competition in Vietnam's ride-hailing market is exemplified by the exit of GoJek super app, one of Southeast Asia's largest ride-hailing platforms that also offers diverse services like food or parcel delivery, in September 2024 (Gojek, 2024). Despite being a well-established player with a strong presence in other regional markets, GoJek struggled to sustain a competitive position and a stable market share in Vietnam due to the dominance of local players like Grab and newer entrants like XanhSM. The aggressive pricing strategies, frequent promotions and rapid innovation by competitors made it difficult for GoJek to compete, leading to its withdrawal (Vietnam Investment Review, 2024).

According to data from Q&Me, by the first quarter of 2024, the leading companies in Vietnam’s ride-hailing market are Grab with 42% market share, followed by Be with 32% and Xanh SM with 19% (Tuc, 2024). This marks a significant shift from 2021 (figure 6), with Grab remaining the dominant player but holding a reduced share; Go Jek, which previously held 18% yet now shrunk to 7% and is preparing to exit the market due to its inability to compete; and a strong entry of Xanh SM - a local brand offering exclusively electric vehicles (Tuc, 2024).

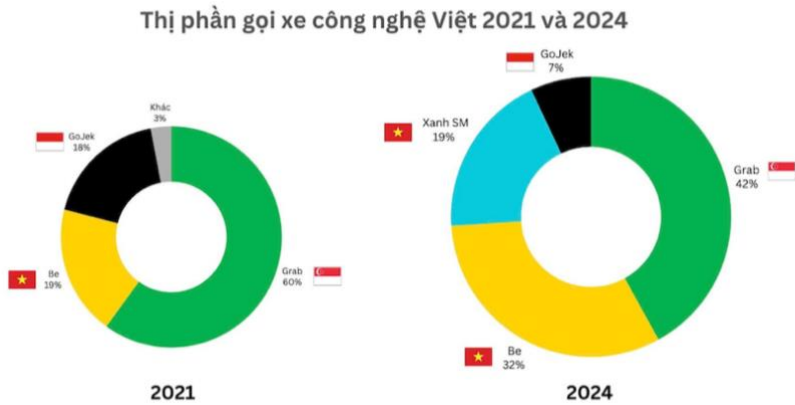


Figure 6: Market Share of Digital Ride-Hailing Services in Vietnam: 2021 vs. 2024
Source: CAFEF Vietnam, 2024.

According to report by Q&Me (2024), which surveyed 316 ride-hailing users, Grab has the largest user base and on average, a Grab customer spends about 366,000 VND per month on its services. Meanwhile, Be users have the highest monthly spending at 474,000 VND (figure 7), followed by Xanh SM at 347,000 VND, then Grab, then Gojek at 332,000 VND (Q&Me, 2024).

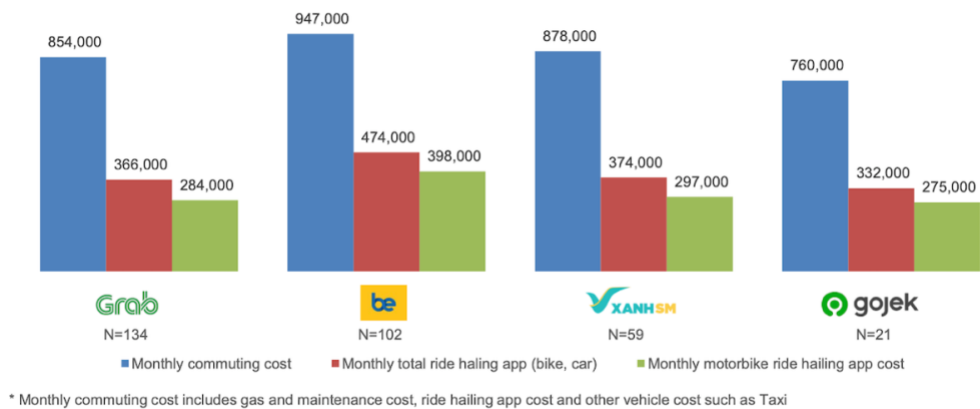


Figure 7: Transportation cost analysis - Vietnam ride-hailing market.
Source: Vietnam Market Research Report - Motorbike ride-hailing popularity 2024. (Q&Me, 2024, p. 14.)

2.2.4. Electric Vehicle Trends in Vietnam

In our modern economy, electric vehicles (EVs) are a viable possibility for establishing an environmentally friendly transportation industry, owing to their minimal to zero carbon emissions, reduced noise pollution, superior efficiency and compatibility with electricity supply and integration (Nanaki, 2020). In Vietnam specifically, EVs is gaining increasing popularity. Indeed, Vietnam's electric vehicle market is experiencing rapid growth, with by companies like VinFast, the mother company of Xanh SM, whose VF e34 model became the most environmentally friendly vehicle in Vietnam, achieving monthly sales of 2000 units in 2022 (Le, 2024). Additionally, according to an updated report by KPMG Vietnam (2024), approximately 70% of survey participants express an intention to acquire an electric vehicle, consisting of both completely electric and hybrid versions (figure 8).



Figure 8: Engine Type Reference - Vietnam market.

Source: *Driven by Voltage: Navigating the EV landscape.* (KPMG Vietnam, 2024, p. 6.)

2.2.5. Overview Of Grab And Its Expansion In Vietnam

Grab is a Southeast Asia's leading super app, launched in 2012 as a single-purpose ride-hailing platform and has since then transformed into a super app offering an ecosystem of essential services such as ride-hailing, food delivery and digital payment solutions (figure 9). Positioning itself as an 'Everyday everything app' for customers, Grab has fulfilled the needs for millions

of people over 500 cities and 8 countries in Southeast Asia namely Malaysia, Cambodia, Indonesia, Singapore, Thailand, Philippines, Myanmar and Vietnam. According to Grab's most recent report for the Second Quarter of 2024, its on-demand monthly tracked users have reached 36.7 million, with revenue hitting \$664 million, marking a 17% increase compared to the previous year. For consumers, Grab's ecosystem of services include Deliveries (Food, Groceries and Express - packages, documents, etc.); Mobility (GrabBike, GrabCar); Financial services (cashless payments, insurance) and many other offerings like booking hotels or sending gift cards to friends (Grab, 2024).

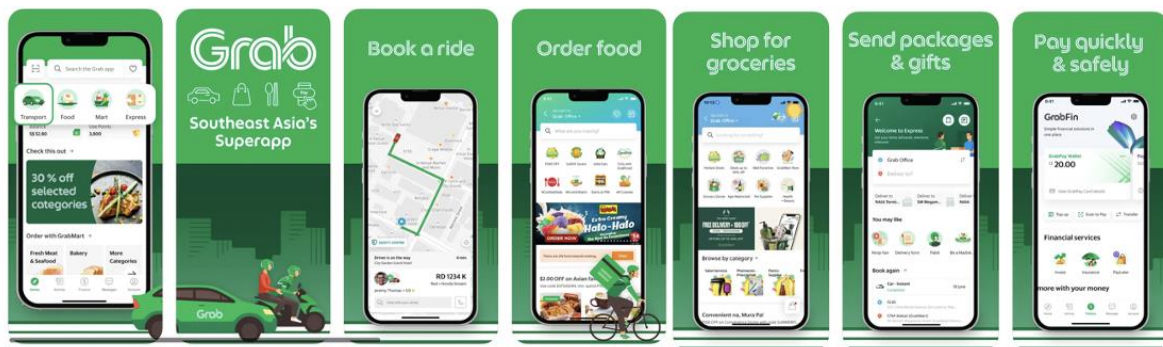


Figure 9: Grab Super App interface.

Source: Grab, App Store Preview, 2024.

Grab's business strategy is to build its own ecosystem by leveraging data and technology to optimize connections between its services, focusing on user online and offline experience, and it brings together third-party services to make transactions more seamless (Roslina, 2020). According to Roslina (2020), Grab's innovation approach focuses on staying aligned with users' needs by continuously researching and developing offerings that can keep users loyal and committed, which inclusively applied for its ecosystem stakeholders, including customers, partners, merchants and agents.

Originally entered into Vietnam in 2014 as GrabTaxi (Tran & Pham, 2021), after 10 years of persistent effort, Grab has now been operating in over 50 provinces and cities across Vietnam, reaching outstanding performances (Grab Vietnam, 2024). Indeed, according to a press release by Grab Vietnam (2024), 2023 was a successful year for the company, with a 14% year-over-year increase in monthly rides, 22% improvement in merchants' revenue, and Grab has

supported agricultural digitalization by selling nearly 700 tons of quality products through GrabMart, enhancing efficiency, income and savings for both users and partners.

In terms of pricing, Grab offers competitive rates across its various services. For instance, the minimum fare for GrabCar (including options like GrabCar 4 seats, 7 seats, GrabCar Savings and GrabCar Plus) ranges from approximately 22,000 VND to 33,000 VND for the first 2 kilometers. Meanwhile, GrabBike services (including GrabBike, GrabBike Savings and GrabBike Plus) have a minimum fare of 12,000 VND to 16,000 VND for the same distance (Grab Vietnam, 2024). In a competitive analysis context, Table 3 highlights the services and pricing of the three leading ride-hailing players: Grab, Be and Xanh SM. Notably, Grab offers the widest range of services at a highly competitive price range.

Company	Service	Price Range
Grab	GrabCar (GrabCar 4 seats, 7 seats, GrabCar Savings and GrabCar Plus)	22,582 VND - 33,382 VND for the first 2 kilometers
	GrabBike	12,273 VND - 15,709 VND for the first 2 kilometers
Be	BeCar (4 seats, 7 seats, BeTaxi)	30,520 VND - 38,000 VND for the first 2 kilometers
	BeBike and BeBike Plus	12,787 VND - 14,500 VND for the first 2 kilometers
Xanh SM	Xanh SM Taxi (4 seats, 5 seats)	20,000 VND - 21,000 VND per kilometer
	Xanh SM Bike	13,800 VND for the first 2 kilometers

Table 3: Comparative Analysis of Services and Pricing for Major Ride-Hailing Providers (Grab, Be, Xanh SM)

Source: *Author's own collection from Companies' official websites (Grab, Be, Xanh SM).*

A super app evolution framework developed by Hasselwander (2024) (figure 8) will be utilized to provide a comprehensive overview on Grab's strategy to become a super app since its debut into the Vietnam market in 2014. Hasselwander (2024), based on Ansoff's four growth strategies, proved that a super app business strategy involves phases namely Market Penetration

(introducing products to an existing market to gain market share from competitors), Market Development (exploring opportunities to sell products/services in new market), Product Development (introducing innovative product features), Diversification (introducing new product to a new market), and ultimately Super App (services integrated in one platform).

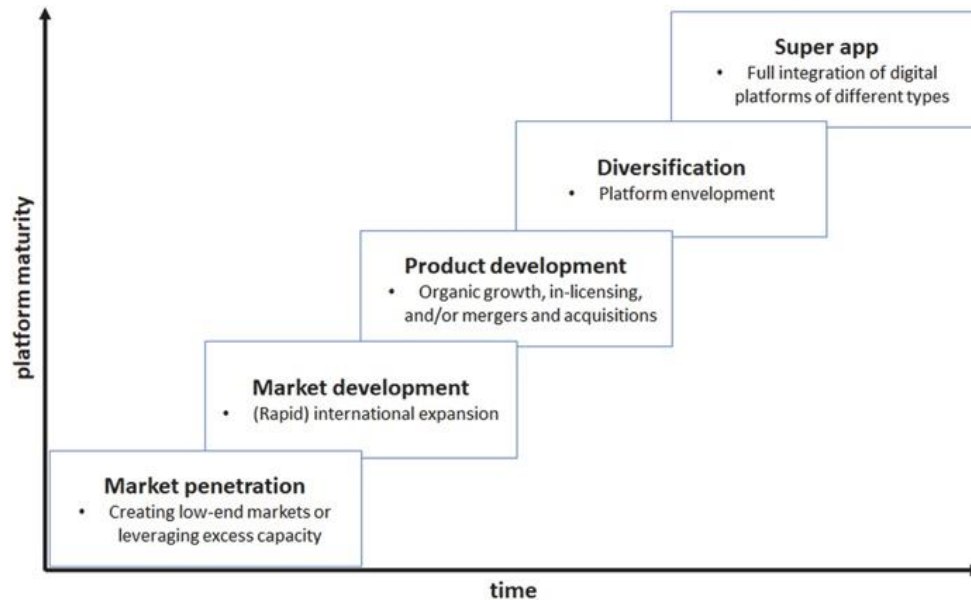


Figure 10: Framework of super app growth strategy

Source: *Digital Platforms' growth strategies and the rise of Super Apps (Hasselwander, 2024).*

Grab's strategic journey as a super app in Vietnam can be divided into five key phases.

- **Market Penetration:** In 2014, Grab entered the market with GrabTaxi, addressing gaps in taxi services by connecting drivers and passengers through a mobile platform. This innovation has significantly changed taxi services and utilized technology to minimize customer wait times.
- **Market Development:** From 2015 to 2018, Grab moved to the Market Development phase, expanding its services with GrabBike, GrabCar, GrabExpress and GrabFood. This growth reached major cities across Vietnam and a broader range of consumer segments. Grab employed localized strategies to effectively compete with regional players like Go-Jek.
- **Product Development:** Between 2018 and 2019, Grab entered the Product Development phase. Specifically, Grab diversified its product offers and partnered with Moca e-wallet to introduce and promote cashless payment for Grab users. As a

result, this collaboration helped establish an ecosystem that is more than just simple transportation or delivery services.

- **Diversification:** From 2020 to 2021, Grab focused on business expansion, entering its Diversification by introducing GrabFinancial. In other words, the brand decided to expand more into financial services.
- **Super App Evolution:** Currently, Grab has developed into a Super App, integrating transportation (ride-hailing), e-commerce (food delivery, digital payments, grocery shopping, courier services) and lifestyle services (ride and travel insurances, accommodation booking, sending gift cards, etc.) all into a single platform.

CHAPTER 3: RESEARCH METHODOLOGY

3.1. Research Design

In this paper, a quantitative research method will be utilized to gather primary data for further analysis. An online anonymous survey is designed and distributed to a sample of at least 100 citizens living in Vietnam. The research will utilize snowball sampling method, which involves contacting existing social networks of the author to reach more audience. Once complete the survey, they will be encouraged to share it with their social networks. The author will spread the questionnaire on Facebook and Messenger, as these platforms are widely used in Vietnam and thus will provide an extensive reach to many demographic groups. The survey will be in Vietnamese language, with questions in various formats namely multiple choice, Likert scale questions for rating agreement level and open-ended questions for insights from users' own experience. The results will be translated into English for analysis and presentation.

The questionnaire is put into four sections:

- **Personal Information:** Participants will provide details about their age group, gender and income level. This section is essential for identifying key user profiles of Grab.
- **Customer Behavior:** Participants will first be asked whether they currently use Grab, used it in the past, or have never used it. The primary analysis will focus on current users, examining their service preferences and satisfaction with Grab's offerings. For those who no longer use Grab or have never used it, there will be specific questions to understand why Grab is not their preferred option.
- **Competitive Market:** This section will explore how current users perceive Grab's performance in comparison to its competitors, including both single-function applications and multi-service super app.
- **Customer Expectations for Grab Vietnam:** This section will include questions exploring potential challenges (intense competition and price sensitive customer) and opportunities for Grab, such as expanding service range or adopting electric vehicles to enhance sustainability and approach environmentally conscious customers. Insights from these questions will help identify areas for Grab to improve and grow.

3.2. Participants Overview

There are 366 Vietnamese participants took part in this survey. The questionnaire was distributed via Microsoft Forms and was conducted over a period from October 21 to October 25, 2024. The survey includes multiple choice, rating level and open-ended questions to gain insight into customer's experience and expectations with Grab. The snowball sampling method was utilized in the completion of this survey. Initially, the author reached out to individuals within her personal and professional network. After completing the questionnaire, these participants were encouraged to share the survey link with their own contacts to further expand the survey participation.

3.3. Limitations

The author acknowledges that the use of the snowball sampling method in this research has certain limitations. First, there is a risk of bias, as participants are from the researcher's personal network and their contacts, which may not fully represent the broader population. This can lead to an over-representation of a particular demographic group or opinion, limiting the generalizing aspect of the findings. Additionally, the researcher has limited control over the expansion of the sample, as participants may forward the survey to individuals with similar backgrounds or characteristics, potentially creating an uneven distribution of respondents. Furthermore, since the questionnaire was distributed online, it was only accessible to those who are active internet users, excluding those who do not use digital platforms or social media regularly. This limitation may result in a sample that is more digitally engaged and potentially younger, which can influence the generalization of the findings.

CHAPTER 4: FINDINGS AND CONCLUSION

4.1. Participants Segmentation and Current Engagement with Grab

To begin with, participants are asked whether they currently use Grab, previously used Grab but no longer do, or have never used Grab before. Among the 366 participants, 61% reported that they currently use Grab, 29% stated that they used to use Grab but no longer do, and 10% indicated that they have never used Grab (chart 1). The primary focus of this paper will be on the **61% participants who are current Grab users**. However, a brief analysis will also be conducted on the remaining two groups to gain insights into why they do not use or have stopped using Grab.

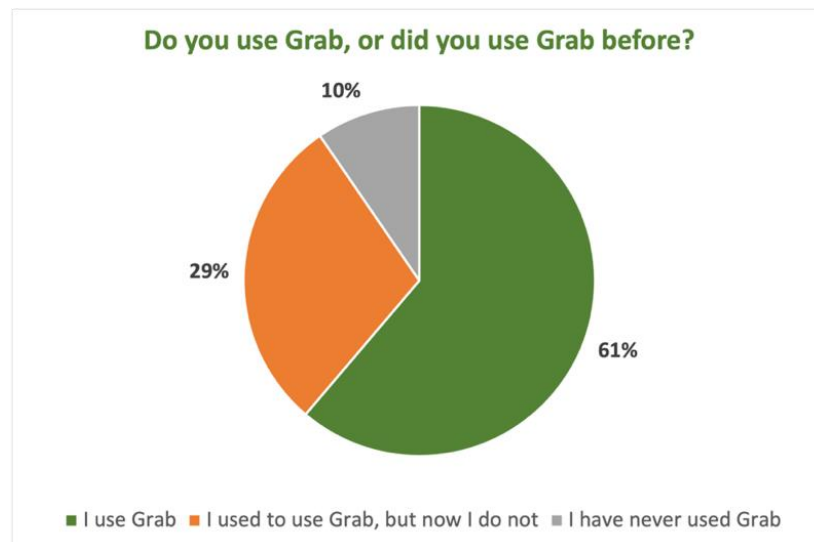


Chart 1: Grab Usage Among Respondents

4.2. Grab User demographic

There are 224 Grab current users participated in this survey. Due to the method of spreading the questionnaire, respondents primarily come from the author's personal and professional network, many of whom are between 18-24 years old, female, belong to the lower income level group and are currently students. In other words, the demographics results, including age, gender, occupation and income level are significantly influenced by the chosen research method.

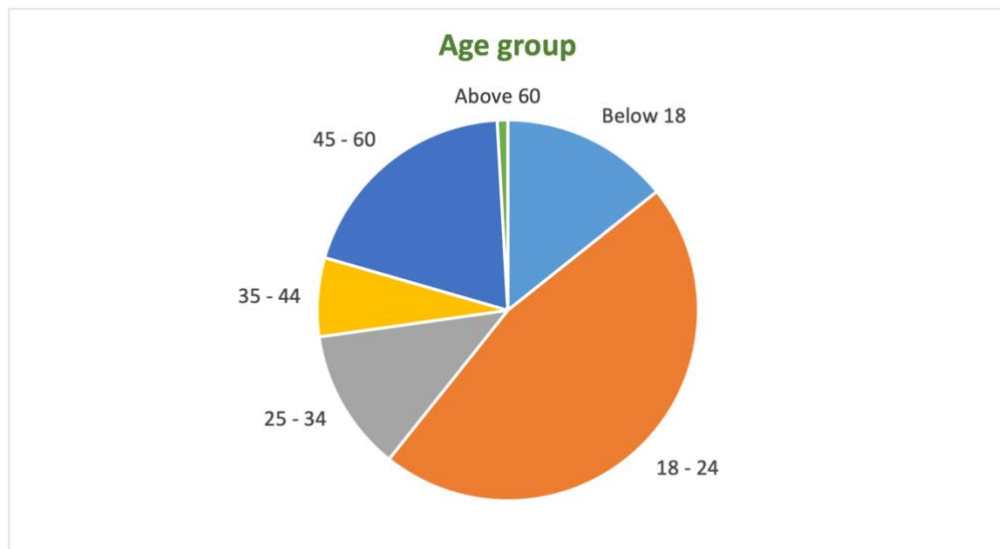


Chart 2: Age Group of Respondents

To begin with, young adults aged 18-24 make up the largest portion of respondents at 46%, followed by the 45-60 age group with 20%, and those under 18 with 14% (chart 2). This may suggest that Grab's user base primarily refer to younger, generation Z individuals, particularly those in the 18-24 age range. Meanwhile, the smaller percentage of users in the 45-60 age group and under 18 indicates that Grab's might be less popular among older adults and younger teens, possibly due to different commuting needs or preferences.

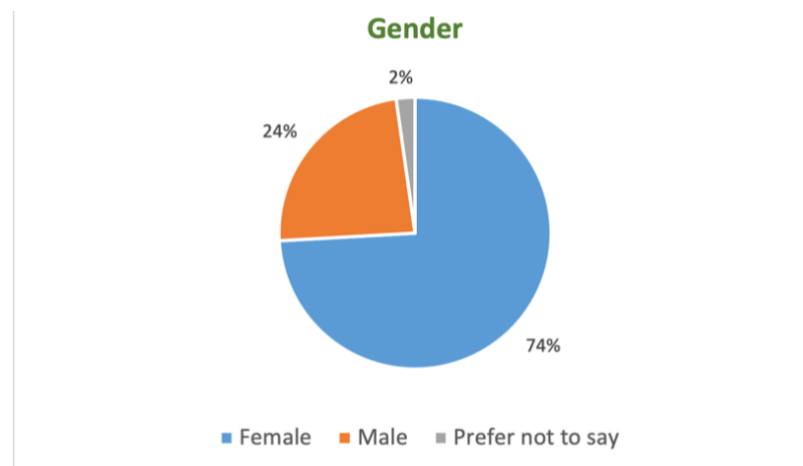


Chart 3: Gender of participants

As illustrated in Chart 3, females represent the majority of respondents at 74%, most of whom being young adults aged 18-24. Males account for 24%, and this group is also majorly in the 18-24 age range. Additionally, both genders being largely represented by the 18-24 age group suggests that younger individuals, regardless of gender, are likely to adopt Grab's services.

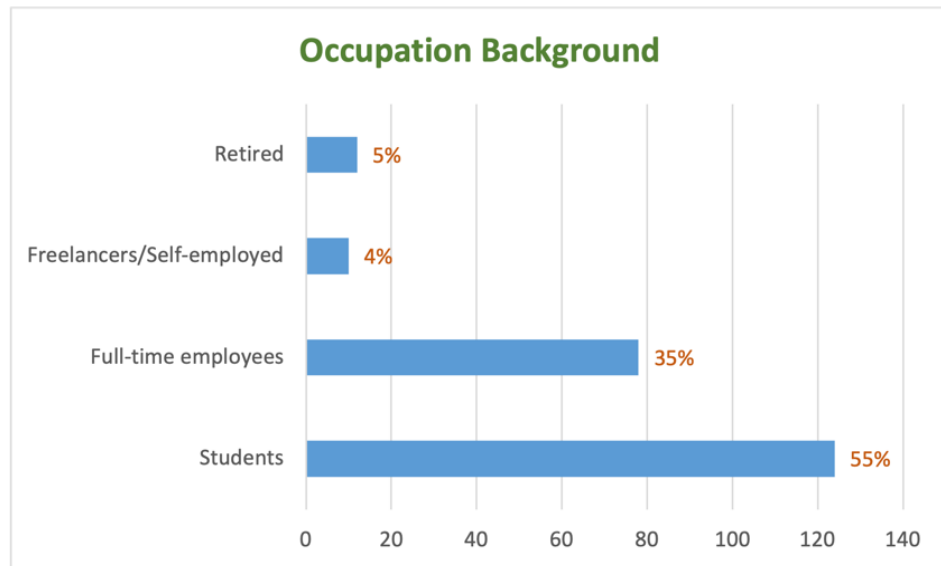


Chart 4: Occupation Background

Chart 4 provides insights into the occupational background of the participants. The majority are students (55%), indicating that this demographic is a significant user base for the service. Full-time employees make up the second-largest group at 35%, showing that working professionals also use the platform frequently. Freelancers/self-employed and retired individuals both represent a much smaller portion of 5% and below, indicating a lower level of engagement among these groups.

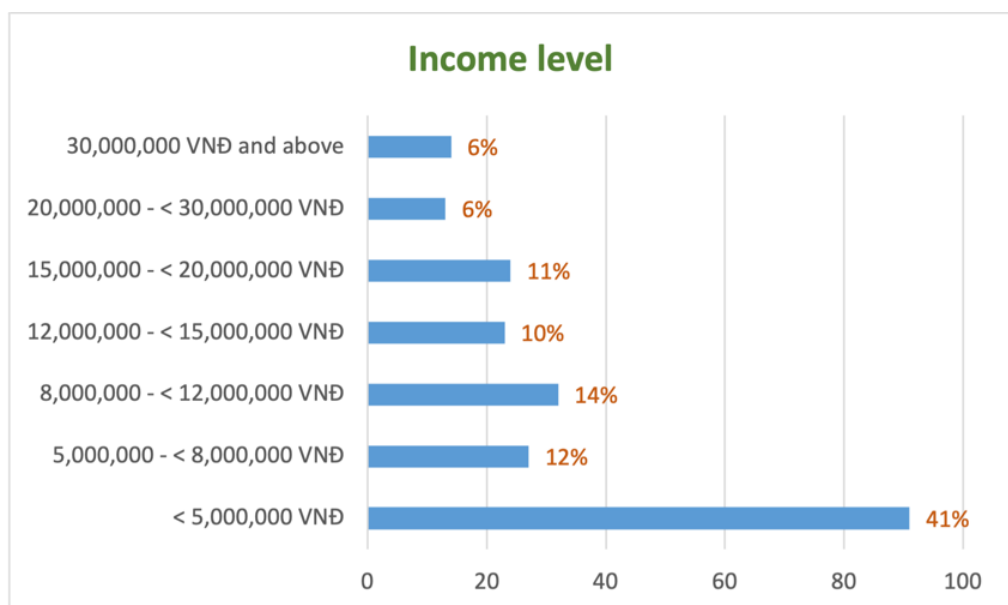


Chart 5: Income Level

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each category.

Chart 5 focuses on the income levels of Grab users in Vietnam. A significant portion (41%) earns less than 5,000,000 VND, which is consistent with the large percentage of students. The three income ranges between 5,000,000 VND and 12,000,000 VND also see substantial proportion of 10-14% each, suggesting that Grab is popular among lower-to-middle-income individuals. The middle-to-upper-income groups (12,000,000 - 20,000,000 VND) account for around 10% each. Meanwhile, higher income brackets (above 20,000,000 VND) account for only 6% of users. Overall, Grab seems to attract a wide range of users, with a focus on younger and lower-income demographics.

In summary, the demographic results provide a suggested overview of Grab's typical customer profile. They are younger and budget-conscious users who seek for affordable services. Full-time employees with low to middle incomes also make up a significant portion of Grab's user base. Conversely, higher-income and older age groups are less represented, indicating that Grab's primary customers are younger individuals with moderate to lower income levels.

4.3. Customer Behavior and Satisfaction Level

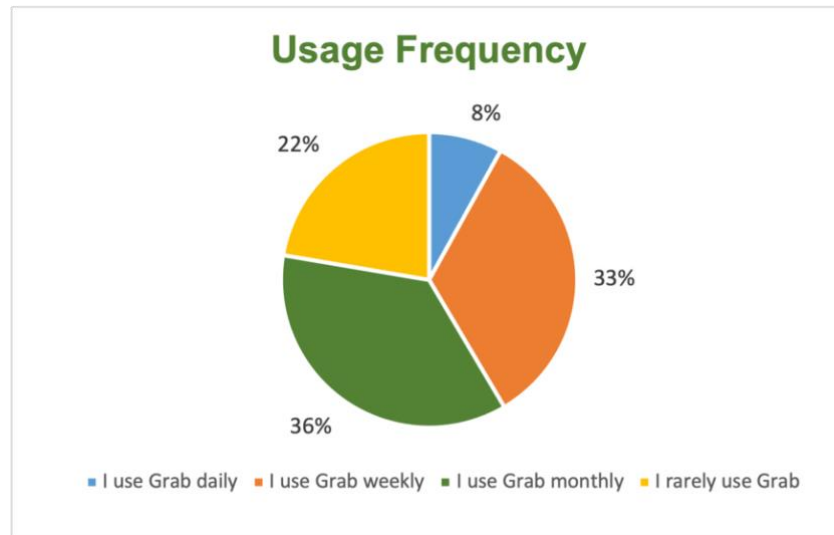


Chart 6: Usage Frequency

Chart 6 illustrates the frequency of Grab usage. To be specific, 36% use Grab on a monthly basis, while 33% use it weekly, showing that most users rely on the service fairly regularly but not daily, which only account for only 8%. Meanwhile, 22% of users rarely use Grab, suggesting there is a portion of the user base that use service only occasionally. Additionally,

Among Grab’s weekly and monthly users, the majority consists of students and young people aged 18-24 with lower income levels.

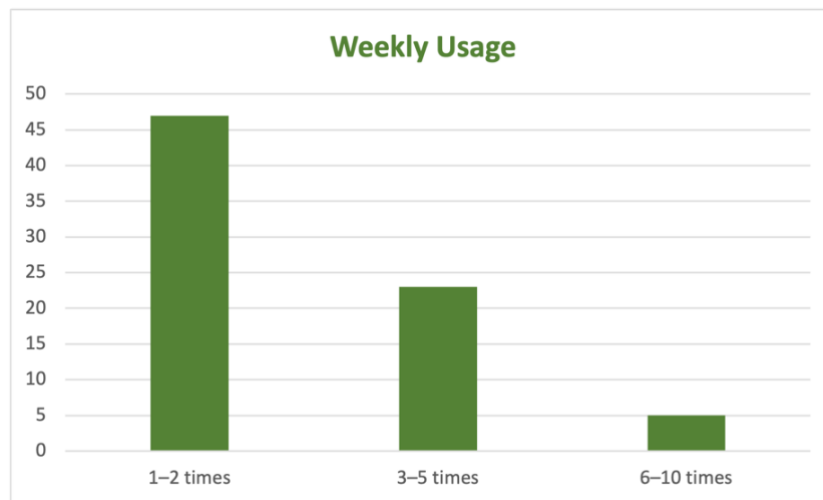


Chart 7: Grab’s Weekly Usage Frequency

Chart 7 specifically illustrates the frequency of weekly Grab usage among its weekly users. The majority, 47 out of 75, use Grab 1–2 times per week. Around 31% use the service at a moderate level of 3–5 times a week. Only a small number of users rely on Grab 6–10 times per week, indicating that high-frequency usage is relatively uncommon.

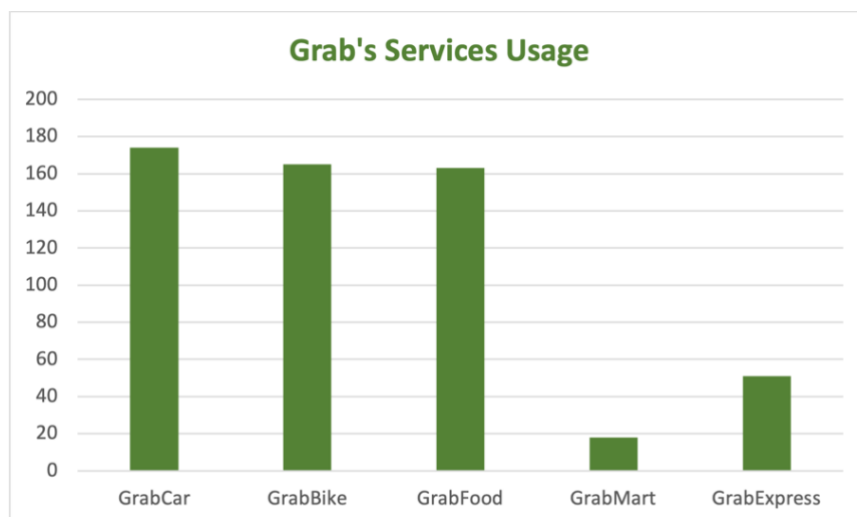


Chart 8: Grab’s Services Usage

Chart 8 shows the usage of different Grab services. For 224 users, the three most frequently used services are GrabBike, GrabCar and GrabFood, indicating these options are essential for many users. GrabBike and GrabCar likely attract due to their convenience and affordability for

commuting, while GrabFood is popular for food delivery, meeting the demand for convenient dining options. Meanwhile, GrabMart and GrabExpress have significantly lower usage. GrabMart, a grocery delivery service, appears to be the least popular, and GrabExpress, used for parcel delivery, sees moderate use but does not match the popularity of transportation and food services. Interestingly, only 23% of current Grab users downloaded the app for a single function or service, which is mainly either GrabCar, GrabBike or GrabFood. **The majority (77%) use Grab for multiple purposes**, mainly combining transportation and food delivery.

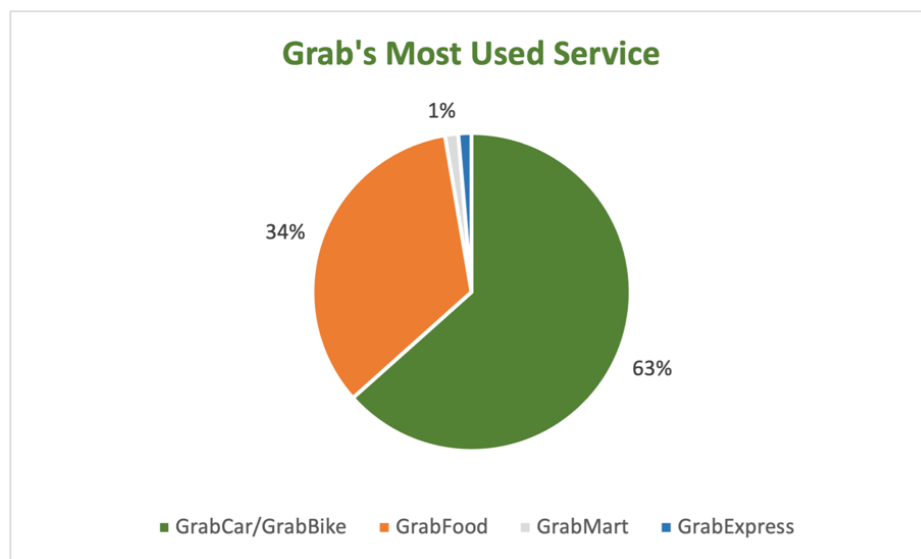


Chart 9: Grab's Most Used Service

To clarify customer's behaviour and preferences, participants are asked '***Among Grab's multiple services, what is one Grab service do you use most frequently?***'. Chart 9 indicates that the most used Grab services are transportation—GrabCar/GrabBike—accounting for 63% of user preferences. GrabFood follows as the second most popular service at 34%. The less-used services, GrabMart and GrabExpress (each close to 1%), reflect limited demand compared to transportation and food delivery, suggesting that users primarily regard Grab as a platform for mobility and dining convenience. This indicates that while GrabCar, GrabBike, GrabFood can serve as stand-alone primary services, GrabMart and GrabExpress are typically used alongside other services rather than being the only reason for downloading the app.

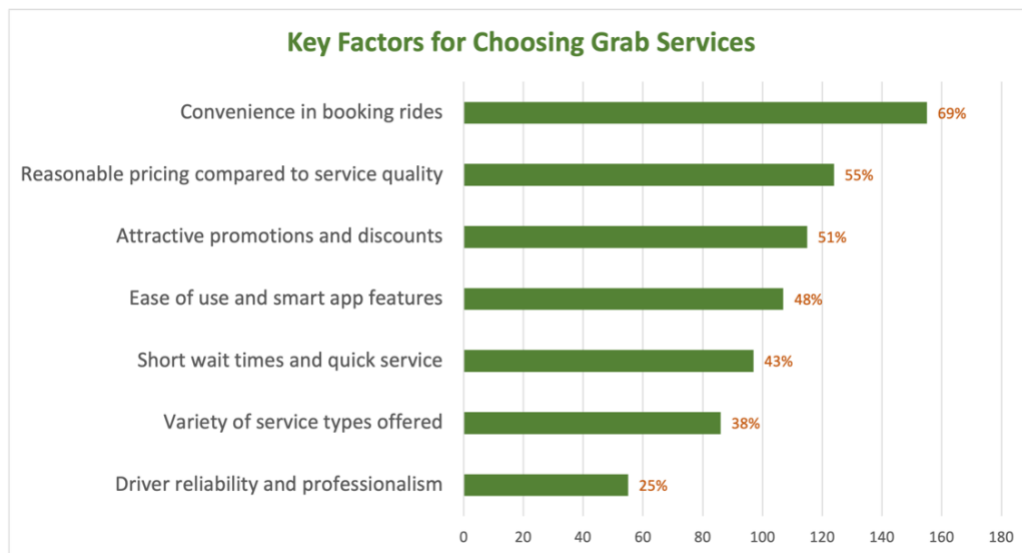


Chart 10: Key Factors for Choosing Grab Services

The red numbers represent the percentage of respondents who selected each factors for choosing Grab. The X-axis indicates the number of respondents for each category.

Chart 10 identifies the top factors influencing users' decisions to choose Grab services. The leading one is 'convenience in booking rides' with 69% user choices, suggesting that ease and accessibility of the app are critical in attracting customers. Following this, 'reasonable pricing compared to service quality' is the drive for 55% users, indicating that value for money is a strong motivator for Grab's customer base. 'Attractive promotions and discounts' come in third with 51%, suggesting that Grab's users are highly price sensitive. 'The variety of service types offered' is valued by 38% of users, indicating that a diverse range of options also enhances Grab's appeal to customers.

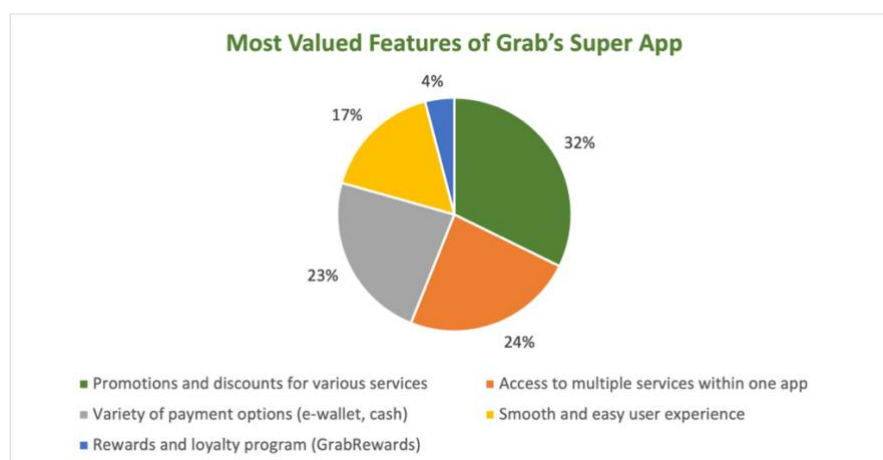


Chart 11: Most Valued Features of Grab's Super App

To be more specific, Chart 11 illustrates the most valued feature of Grab's super app, with promotions and discounts as the leading feature, favoured by 32% of users. This preference indicates that cost savings are a significant motivator for Grab's user base. 'Access to multiple services within one app' follows, valued by 24% of users, reflecting the attractiveness and effectiveness of Grab's super app model, which simplifies users' experience by integrating multiple services into a platform. 'The variety of payment options' (23%) is also highly regarded, indicating that flexible payment methods such as e-wallet and cash options enhance user convenience. Altogether, Grab's super app success is largely driven by its ability to offer cost-effective services, convenient access to multiple services and diverse payment options.

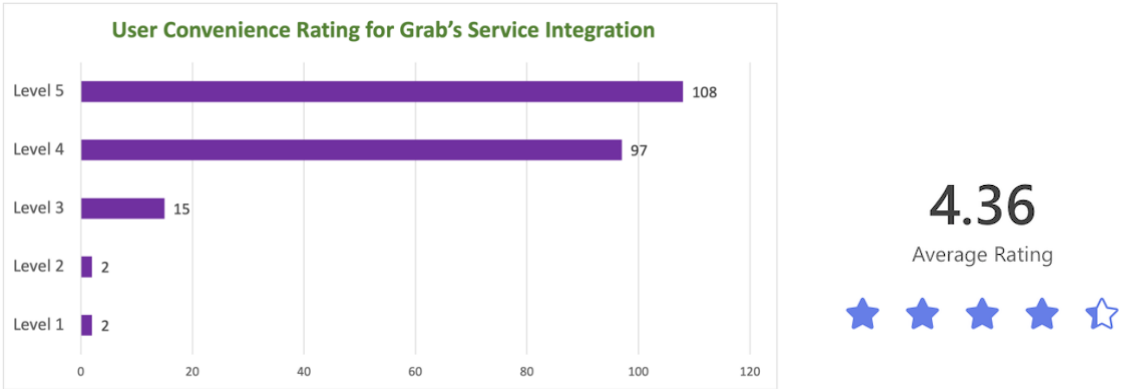


Chart 12: User Convenience Rating for Grab’s Service Integration

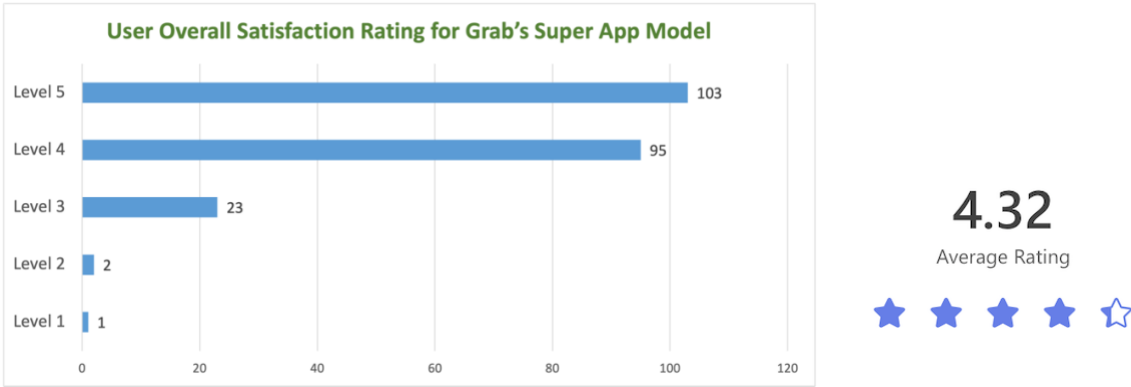


Chart 13: User Overall Satisfaction Rating for Grab’s Super App Model

Grab's super app model received a convenience rating of 4.36/5 (chart 12) and an overall satisfaction score of 4.32/5 (chart 13) from users. The high convenience rating for Grab's services integration (including ride-hailing, delivery and payment) suggests that users find value in the ability to access multiple services within a single platform, which contribute to a smoother user experience. The satisfaction score indicates that, while being generally positive, there may be areas where users feel the super app feature can be further optimized. Overall,

these ratings reflect a favourable and positive user perception to Grab’s multi-service integration and the level of convenience it offers as solutions for people’s everyday lives.



Chart 14: User Satisfaction Level For Each Service Type

Chart 14 shows a consistent satisfaction level of around 4 out of 5 across all Grab service types: ride-hailing, food delivery, parcel delivery and payment services. This suggests that users are generally satisfied with each service offered by Grab, reflecting a positive user experience across different functions within this super app. However, while the rating indicates satisfaction, there are still potential areas for improvement to reach a higher level.

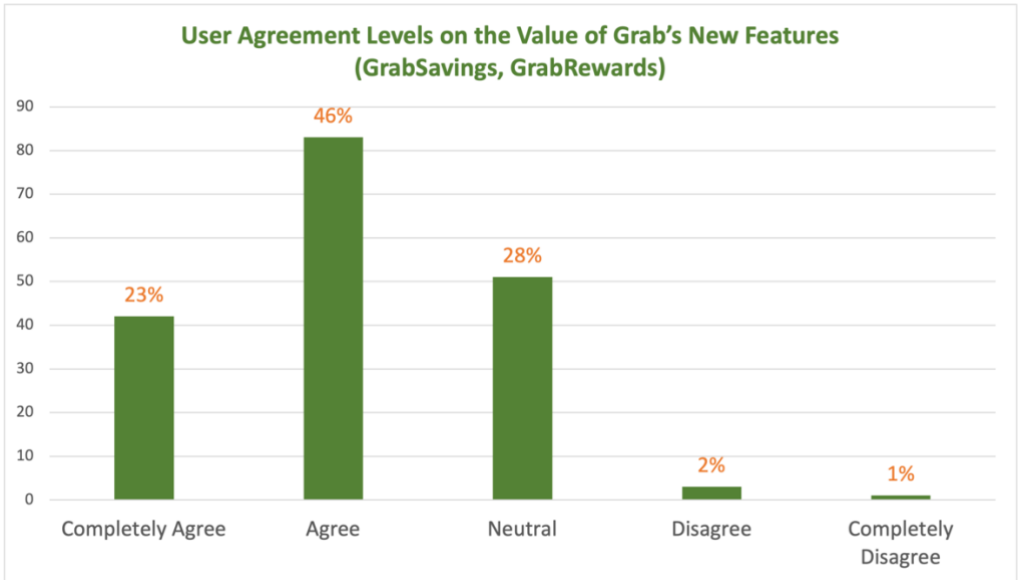


Chart 15: User Agreement Levels on the Value of Grab’s New Features (GrabSavings, GrabRewards)

The red numbers represent the percentage of respondents who selected each level of agreement. The X-axis indicates the number of respondents for each level.

The chart shows users' opinions on whether Grab's new features, specifically GrabSavings and GrabRewards, have enhanced their experience. 80% of the users have used the two new features aboved. A significant majority (46%) 'Agree' that the new features improved their experience, while 23% users 'Completely Agree'. Combined, 125 users (69%) hold a positive view. 28% are 'Neutral', suggesting that the new features are not too impactful to their overall experience. Only a 2% of the total responses have dissatisfaction by rating 'Disagree/Completely Disagree'. This indicates that although most users view the new features positively, a substantial portion remains neutral, highlighting potential areas for further improvement.

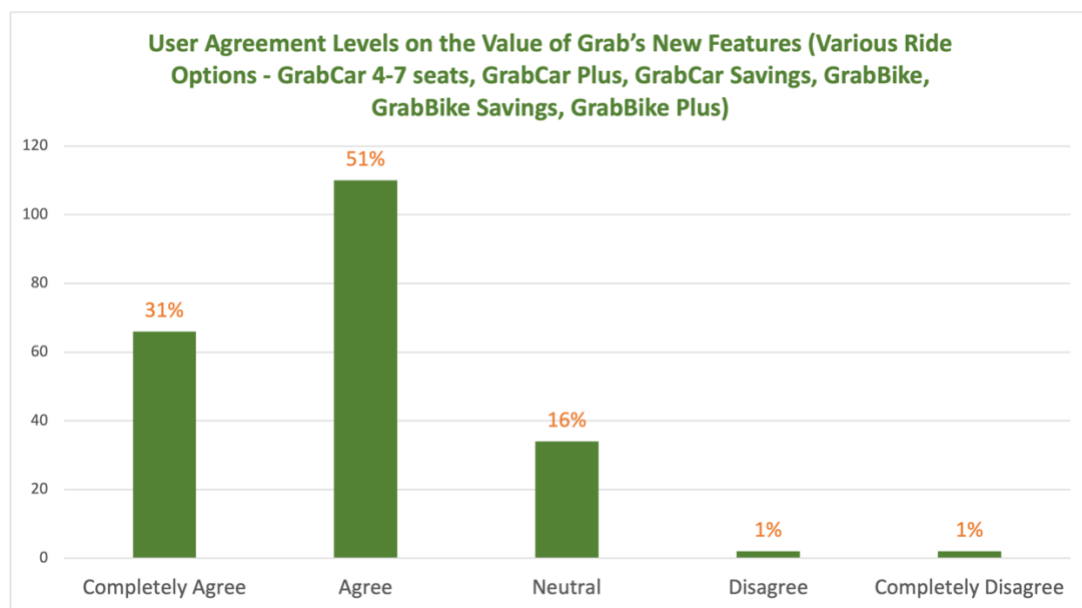


Chart 16: User Agreement Levels on the Value of Grab's New Features (Various Ride Options: GrabCar 4-7 seat/Plus/Savings, GrabBike/GrabBike Savings/ Plus).

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

Regarding the other new features of Grab (various ride options at different price ranges), a significant portion of users also have positive feedback (chart 16), with 'Agree' being the dominant response (51%), followed by 'Completely Agree' (31%). Only 10 out of 224 users reported having never used these new ride options, which indicates higher engagement and general satisfaction level with this feature.

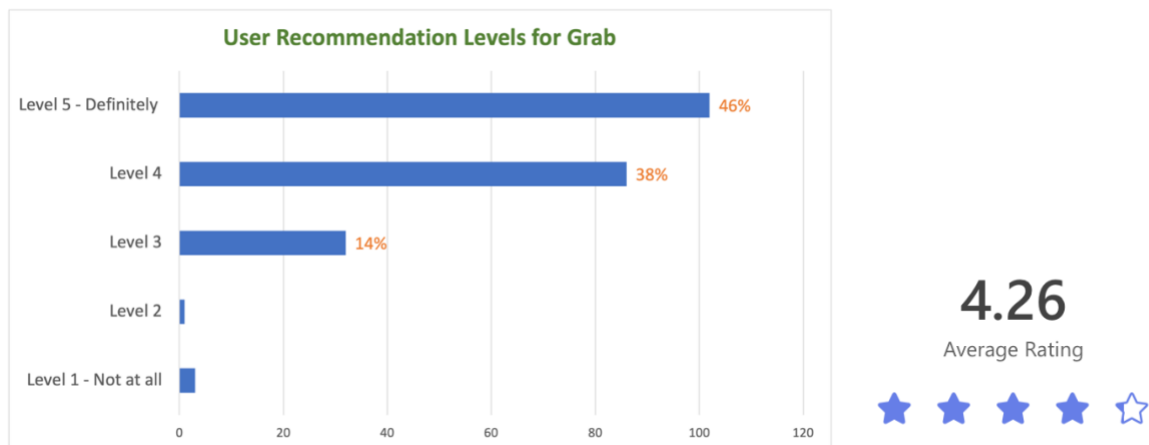


Chart 17: User Recommendation Levels for Grab

Lastly, users are asked on their willingness to recommend Grab to other people (chart 17), and the results are relatively positive with an average rating of 4.26/5. Specifically, nearly half of the responses rate Level 5 - meaning they will definitely recommend Grab to others. Recommendation level 4 also account for a large proportion of 38%, indicating strong positive feedback towards Grab's services. Together, these two highest levels account for 84, demonstrating that the majority of users would recommend Grab to others.

4.4. Competitive Landscape

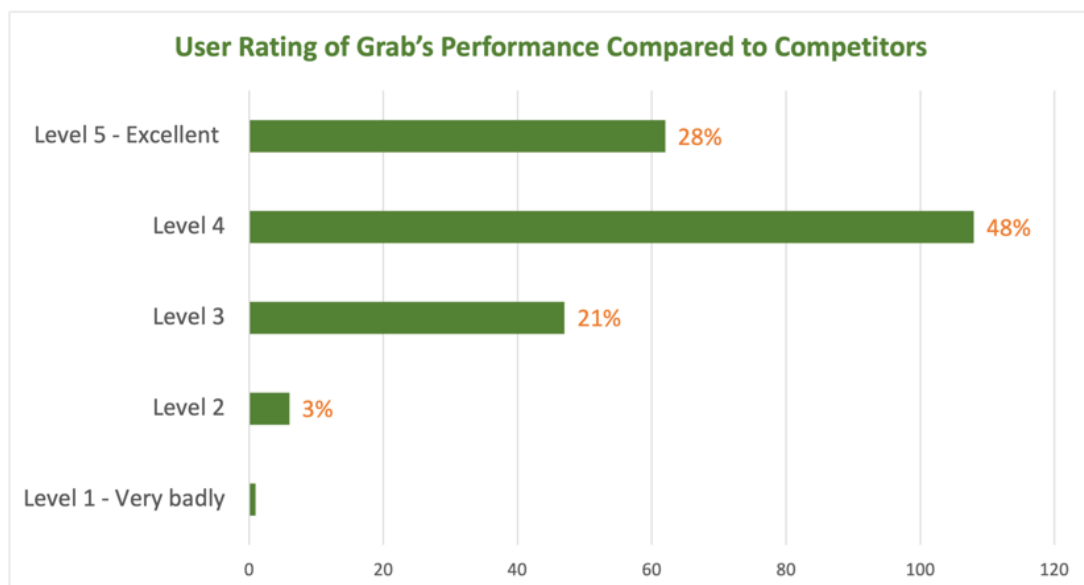


Chart 18: User Rating of Grab's Performance Compared to Competitors

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each category.

To begin with, users hold an overall favourable rating of Grab's performance compared to competitors with an average score of 4/5. Level 4 is the most common rate with 48% of users, while Level 5 - Excellent accounts for 28%, together making up 76% of responses. Level 3 was selected by 21%, while only a small percentage rate Grab poorly (Level 2 and Level 1 totalling 3%). This distribution indicates that Grab is generally seen as a competitive choice in the market, as most users feel Grab performs well compared to similar services.

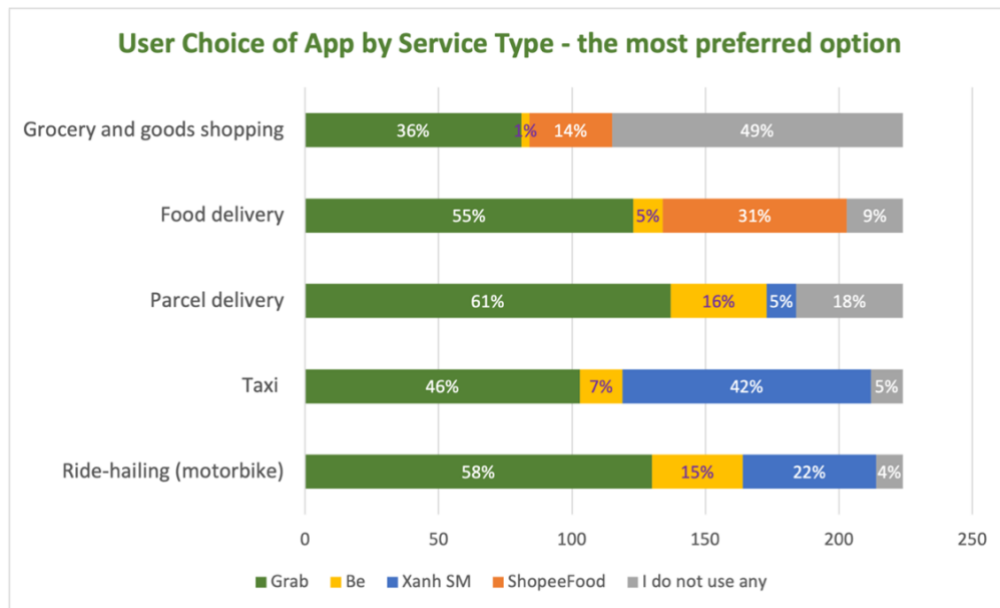


Chart 19: User Choice of App by Service Type - the most preferred option

When participants are asked which app they use the most (chart 19), Grab is the most preferred app across multiple services, particularly for parcel delivery (61%), ride-hailing (58%), food delivery (55%) and taxi services (46%). Additionally, ShopeeFood is a significant competitor in food delivery with 31% of preferred users. Xanh SM holds a strong position in the taxi service sector with 42%. Be super app - Grab's direct competitor, captures less significant preference from users compared to Grab and other single-function apps. Besides this, the portion of customers who do not use any of the suggested brands for each service also drive interesting insights. Specifically, while only half of the respondents use apps to buy groceries, over 90% of them use apps for food delivering and commuting. For parcel delivery, 18% of the respondents use other method, can be personal, post office, or other local services instead of using Grab or Be. Overall, Grab remains the market dominant across various sectors, gaining success and substantial market share with its super app business model. However, there are

substantial opportunities for Grab to expand into other sectors as well, such as grocery and parcel delivery.

4.4.1. Grab compared to single function applications

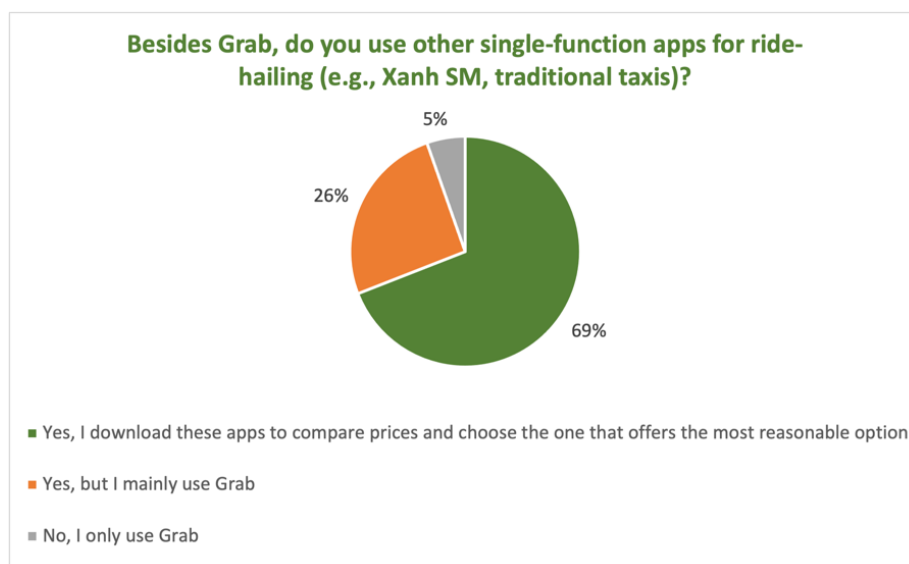


Chart 20: Alternative Single-function Ride-hailing App Usage Alongside Grab

When being asked about the usage of other single-function ride-hailing apps alongside Grab, the majority of users (69%) answer they download other apps to compare prices and choose the most reasonable option, which suggest that the Vietnamese customers are highly price sensitive (chart 20). Interestingly, over 60% of these respondents are students with lower income levels, who primarily use Grab on a weekly basis (39%). This indicates a strong and regular demand for the service within this group and explains their tendency to frequently compare prices across different brands. Additionally, 26% mainly use Grab but occasionally try other apps, while only 5% exclusively use Grab, indicating that most users are open to alternatives in a competitive market.

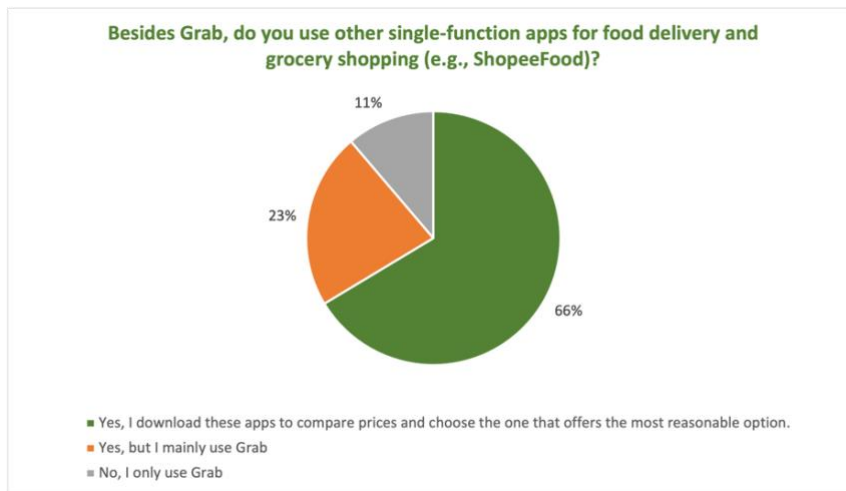


Chart 21: Alternative Single-function Food Delivery and Grocery App Usage Alongside Grab

Regarding food delivery and grocery shopping services, 66% of Grab users download other single-function apps besides Grab, mainly to compare prices and choose the most economical option (chart 21). This suggests that a majority of users are cost-conscious and also highly price sensitive. Meanwhile, 23% mainly use Grab, indicating that most users do not limit themselves to a single platform, but utilizing multiple apps for competitive pricing and convenience. Only 11% of respondents exclusively use Grab for these services, nearly half of whom use it weekly. Most of these exclusive users choose the convenience of accessing multiple services within one platform and the availability of diverse promotions and discounts as their main reasons for using Grab.

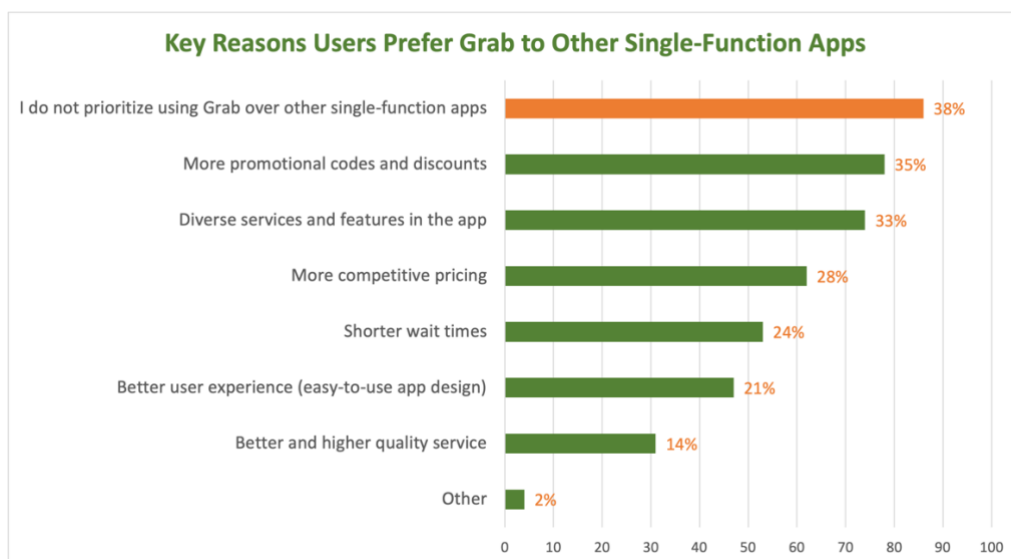


Chart 22: Key Reasons Users Prefer Grab to Other Single-Function Apps

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

Specifically, when asked about the key motivations why choosing Grab over other single-function applications (chart 22), 38% of users do not prioritize Grab, indicating that a significant portion are open to using other competing platforms. Among those who favour Grab, ‘Promotional codes and discounts’ is a major factor (35%), follow by ‘Diverse services and features’ (33%), ‘Competitive pricing’ (28%) and ‘Shorter wait times’ (24%). Overall, the data suggests that Grab face strong competition from single-function alternatives, mainly as customers are highly cost-conscious and price sensitive, thus their choice of service is greatly influenced by prices. However, compared to other single-function app, Grab still gains a priority position in a great portion of customer base due to its ability to meet the price preferences of customers as well as the convenience level Grab provides for pursuing the super app business model - many services in one platform.

4.4.2. Grab vs. Be Super App: A Direct Competitor Comparison

In this section, user preferences between Grab and Be across various services, including ride-hailing, food delivery, grocery shopping and parcel delivery, will be analysed. By examining which platform users favour for each service, the author aims to understand the strengths and weaknesses of Grab in meeting diverse user needs. This comparison provides insights into user loyalty, preferences and factors influencing choices between these two multi-service applications in a highly competitive market.

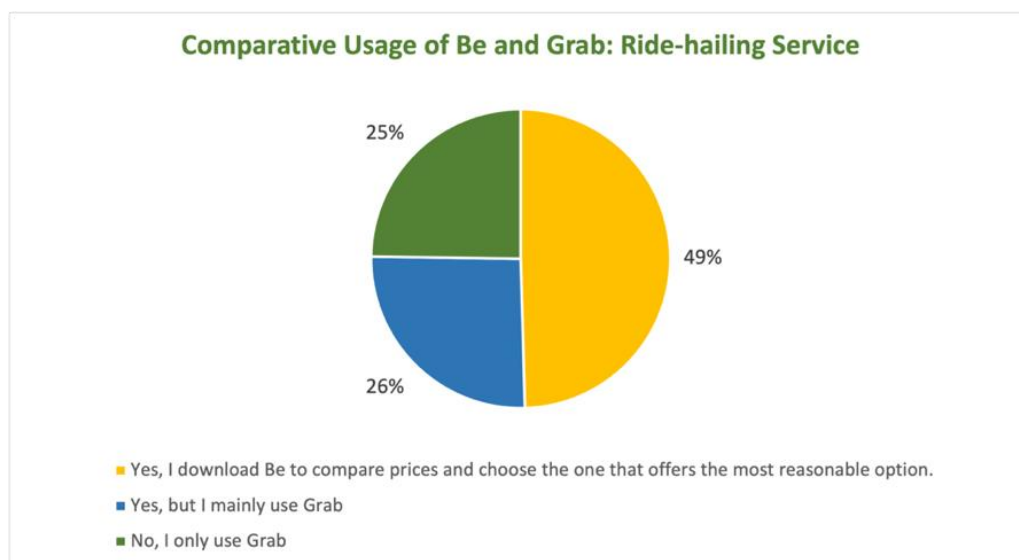


Chart 23: Comparative Usage of Be and Grab: Ride-hailing Service

Regarding ride-hailing service - Grab and Be most popular product offering, Chart 23 shows that 49% of users download Be alongside Grab to compare prices and select the more affordable option, indicating that nearly half of the users are price-sensitive and open to alternatives. Interestingly, 83% of this group also use other single-function apps, such as Xanh SM, for price comparison before making a final choice, with many initially favouring Grab for its numerous discounts and promotions. This suggests the high price sensitivity within this customer base for ride-hailing services. Meanwhile, 26% of users also have Be installed but primarily use Grab, demonstrating certain level of loyalty to Grab while keeping Be as a backup. The top reason for this group of respondents to choose Grab, with 31% proportion, is its wide range of services available within a single platform. Additionally, 25% of respondents exclusively use Grab, with 34% of them citing the main reason is Grab's extensive promotions and discounts. This distribution suggests a competitive landscape where price comparison is a key factor in user behaviours.

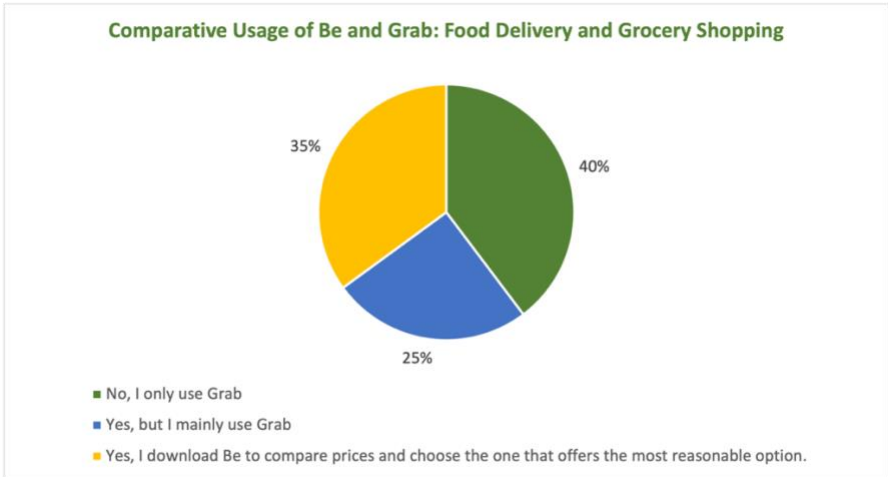


Chart 24: Comparative Usage of Be and Grab: Food Delivery and Grocery Shopping

Chart 24 illustrates user preferences between Grab and Be for food delivery and grocery shopping. 40% of users exclusively use Grab, indicating a strong loyalty to the platform. Meanwhile, 35% download Be as well to compare prices and select the most affordable option, showing that a significant portion of users are price-sensitive and willing to use multiple apps to find the best deal. Another 25% has Be but still mainly use Grab, suggesting that Grab remains their primary choice.

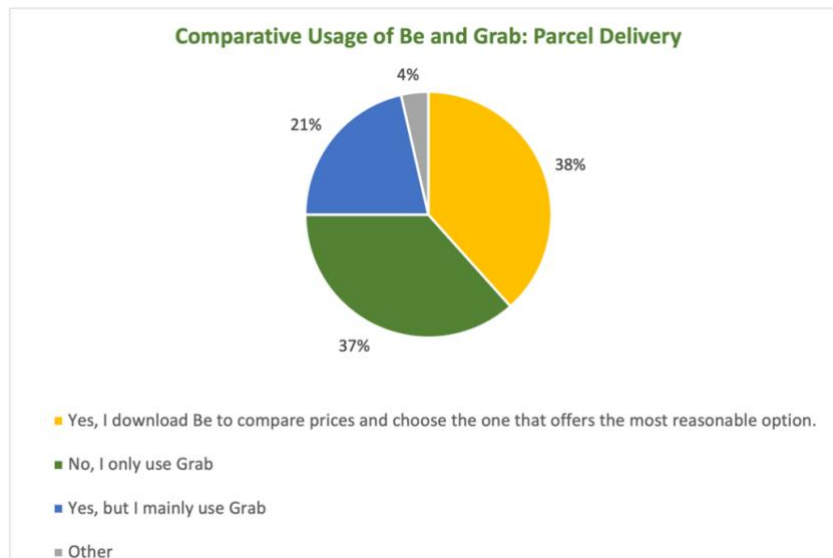


Chart 25: Comparative Usage of Be and Grab: Parcel Delivery

Regarding parcel delivery service (chart 25), 38% of users download Be in addition to Grab to compare prices and choose the most economical option. 37% exclusively use Grab, and 21% users have Be but still mainly use Grab, suggesting a preference for Grab despite other alternatives. Overall, the data indicates strong competition between Grab and Be in the parcel delivery sector, with users actively comparing services to find the best deal.

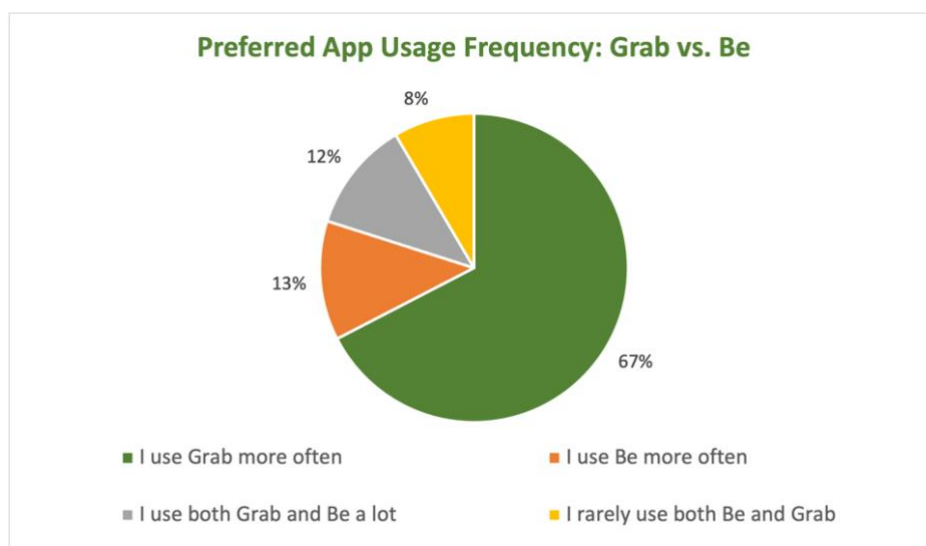


Chart 26: Preferred App Usage Frequency: Grab vs. Be

Regarding usage frequency, 67% of users use Grab more frequently than Be, compared to 13% users favouring Be (chart 26). Among the 67%, the most common reason for choosing Grab is its numerous discounts and promotions (31%), followed by its wide range of services. This is

notable since both Grab and Be are super apps offering similar services, indicating that Grab's competitive edge lies in its effective pricing strategy, with frequent discounts and promotions programs. This advantage is essential in a highly competitive market with many major players and a significant threat from substitute products. Meanwhile, 12% report using both apps frequently, showing a subset of users who find value in both platforms. Interestingly, when focusing on ride-hailing services, one of the main offerings for both Grab and Be, 93% of users also download other single-function ride-hailing apps such as Xanh SM to compare prices. This behaviour indicates the high level of price sensitivity among users and reflects a market where consumers actively seek the best value. In other words, while super apps like Grab and Be offer comprehensive services, users are still willing to explore specialized alternatives to optimize costs.

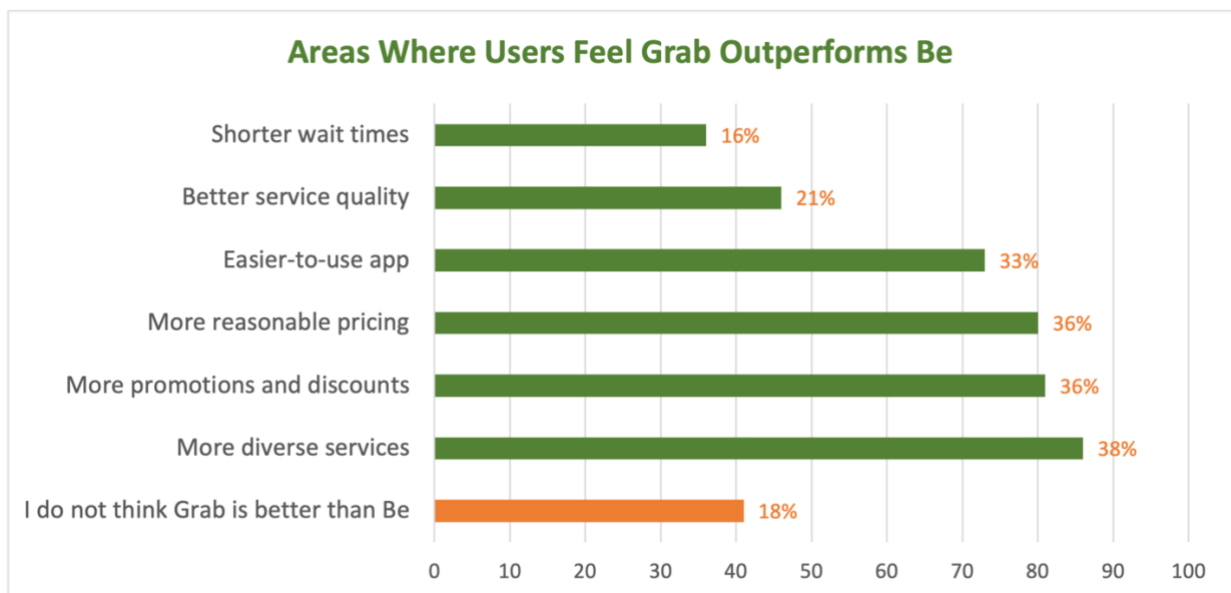


Chart 27: Areas Where Users Feel Grab Outperforms Be

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

Specifically as shown in chart 27, 82% respondents think Grab performs better than Be in general. The primary reasons for this preference include Grab's more diverse range of services, chosen by 38% of respondents, the availability of more frequent promotions and discounts (36%), and more reasonable pricing (36%). These factors indicate Grab's appeal as a comprehensive and cost-effective option for users seeking variety and price-optimal option. On the other hand, only 18% of respondents believe that Be matches or surpasses Grab's performance, suggesting that Grab holds a significant advantage in key areas that are important

to consumers, such as service diversity and affordability. As a result, compared to its direct competitor who offer very similar services, Grab is evaluated to outperform Be and is more appealing to customers due to its high convenience in diverse services and good pricing strategy for a cost-conscious and price sensitive customer base.

4.5. Customer Expectations for Grab Vietnam

This section focuses on areas where users believe Grab can improve or expand to stay competitive in Vietnamese market. Through insights gained from this section, the author aim to outline key opportunities for Grab to engage better with customers’ evolving preferences and needs. Specifically, an idea of introducing electric vehicle (EVs) in the ride-hailing service is emphasized on this questionnaire, given the growing popularity of EVs in Vietnam - a service currently offered exclusively by Xanh SM, Grab’s main competitor in the transportation sector.

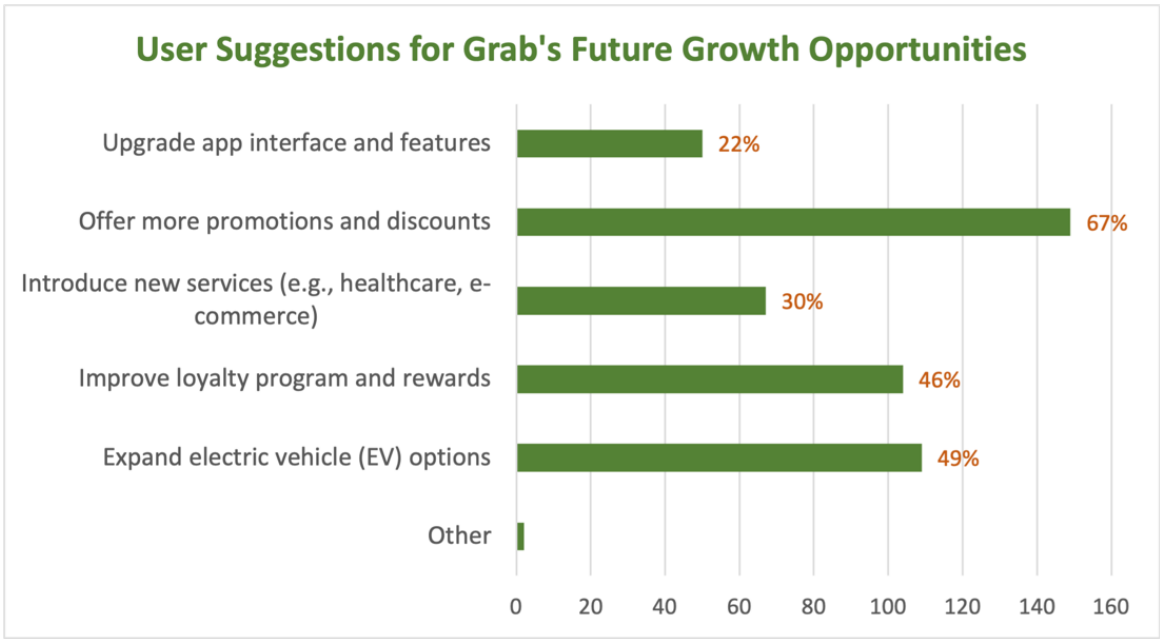


Chart 28: User Suggestions for Grab's Future Growth Opportunities

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

The chart illustrates key areas users believe Grab should focus on to stay competitive and grow in Vietnam (chart 28). The top suggestion, selected by 67% of respondents, is to offer more promotions and discounts. This aligns with previous findings that show Grab users are highly price-sensitive and consistently seek the best price deals. The next most popular

recommendation, at 49%, is to expand electric vehicle (EV) options, showing a strong interest in sustainable choices. Among this 49%, most respondents are students and full-time employees with low to middle-level incomes, with 95% also downloading other ride-hailing apps such as Xanh SM for price comparisons. Additionally, 46% suggest improving Grab's loyalty program and rewards, while 30% vote for the introduction of new services such as healthcare and e-commerce. Lastly, upgrading the app's interface and features is mentioned by 22%, suggesting that users see room for app design improvements. These insights emphasize users' focus on cost savings, sustainability, rewards and service diversification.

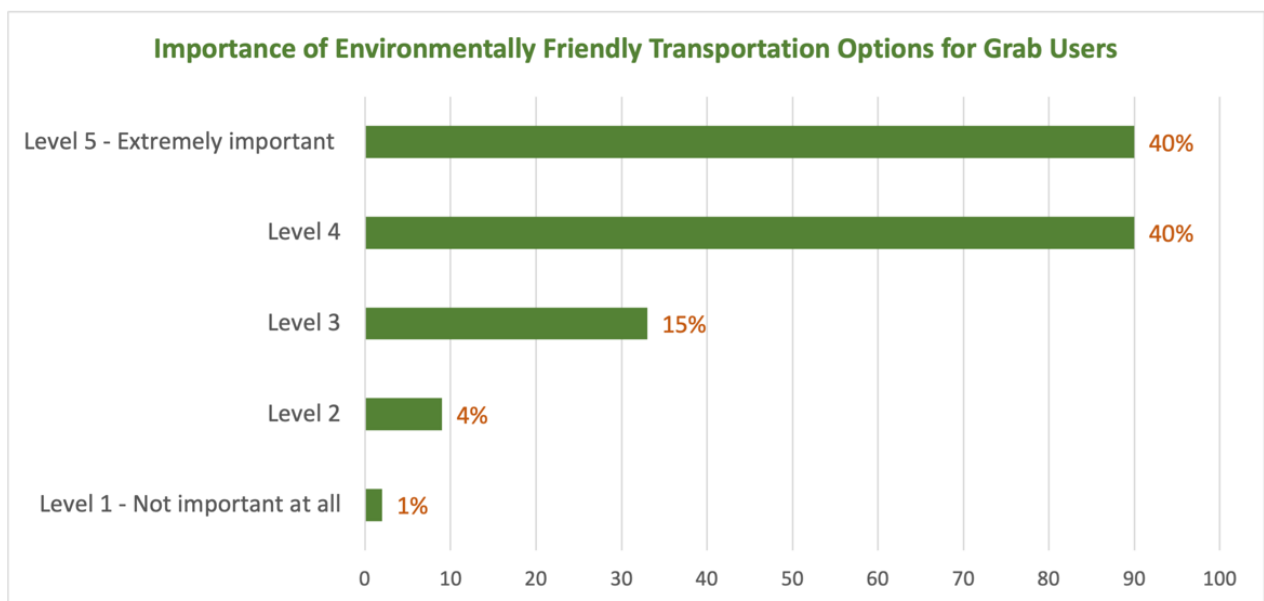


Chart 29: Importance of Environmentally Friendly Transportation Options for Grab Users
The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

Environmentally friendly travelling options, such as electric vehicles are highly valued by Grab users with an overall rating of 4.15/5. Specifically, 40% rate it as "Extremely important" and another 40% rate it as 'Level 4' in importance (chart 29). This suggests that a substantial portion of the user base considers eco-friendly options a plus point. Only a small portion of total 5% indicates limited interest in green initiatives.

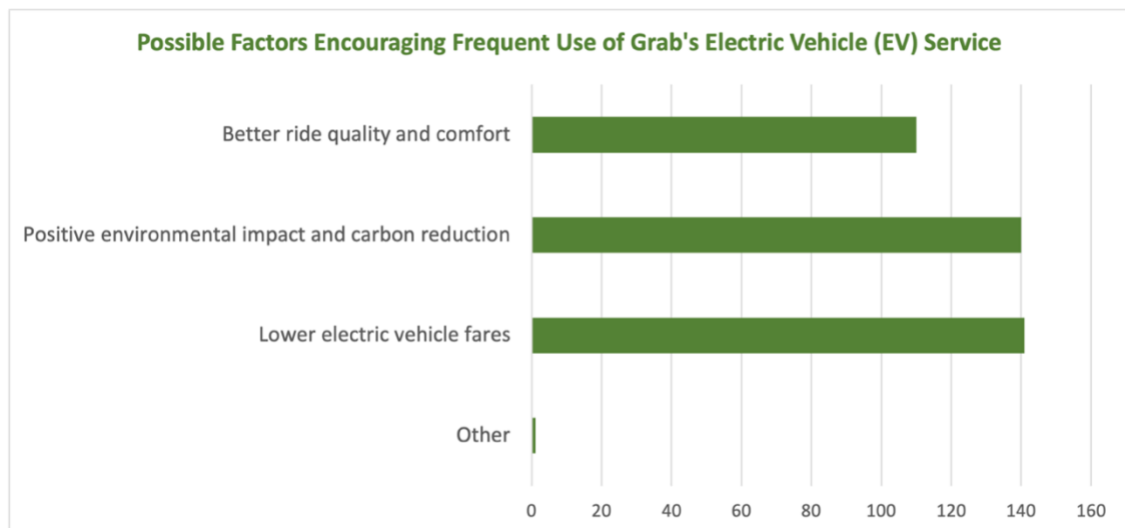


Chart 30: Possible Factors Encouraging Frequent Use of Grab's Electric Vehicle (EV) Service

When being asked *‘What factors would encourage you to use Grab's electric vehicle (EV) service more frequently?’*, the majority of participants choose lower electrical fares as the main reason, proving that pricing is still the major usage driver (chart 30). This finding reinforces previous insights that Vietnamese consumers are highly price sensitive and motivated by cost-effective options. The second most influential factor is the positive environmental impact, chosen by 63% of respondents. This indicates a significant interest in sustainability and a growing awareness of eco-friendly transportation solutions among users. The last factor is better ride quality and comfort, yet still with quite high figure of roughly 50%. This suggests that while pricing is vital, environmental consciousness and the quality of the ride are also critical considerations for users.

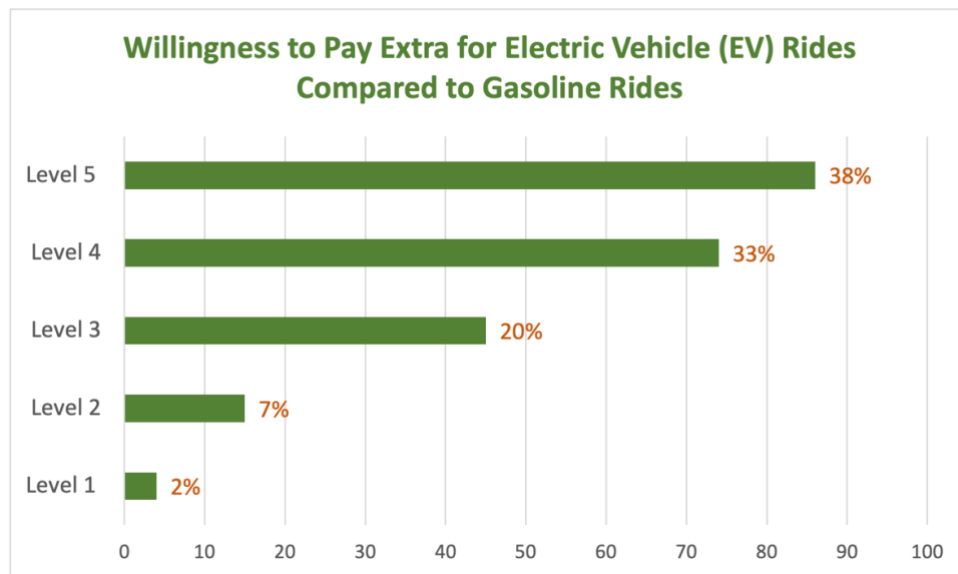


Chart 31: Willingness to Pay Extra for EV Rides Compared to Gasoline Rides

The red numbers represent the percentage of respondents. The X-axis indicates the number of respondents for each agreement level.

When it comes to users' willingness to pay extra for possible Grab's electric vehicle (EV) rides compared to traditional gas-powered rides. A significant proportion (38%) selected Level 5, indicating they are dedicated for environmentally friendly ride options, while another 33% rated their willingness at Level 4. Meanwhile, 20% were neutral (Level 3), and a smaller segment (9%) showed low willingness. This suggests that customers are open to pay extra for EV options, indicating a strong interest in sustainable transportation among Grab users.

Lastly, users are asked to give their personal opinions on what Grab can do to improve its services and better meet customers' needs. The majority of responses express strong emphasis on more discounts and promotions program, suggesting that price is the key to retain customer base. Other than that, some suggest that Grab should improve drivers' training and customer services for each ride.

4.6. Former Users and Non-user Insights

The '**Former Grab User**' group consists of 107 individuals. The predominant age group is 18-24 years, representing 35% of the participants, followed closely by the 45-60 age group at 31%. Additionally, 71% of former users are female. Most of these individuals are either students (48%) or full-time employees (39%). When asked about their reasons for no longer using Grab,

73% stated that they no longer need the platform's services, explaining that they either commute using their own vehicles or public transportation. Meanwhile, 21% explained switching entirely to competing brands namely Be, Xanh SM and Shopee Food. Among the 10% of participants who belong to Grab's '*Non-user*' group, 63% stated they do not need such services, while 23% mentioned they are more familiar to using other brands, specifically Xanh SM and Be.

4.7. Research Conclusion and Suggestion for Grab Vietnam

In conclusion, the integration of diverse services within Grab's super app significantly enhances user experience and fosters loyalty. Specifically, by combining ride-hailing, food delivery, grocery shopping, parcel delivery, digital payment services and many other lifestyles related services into one single platform, Grab is able to provide customers with convenience and affordable product offers compared to its competitors in the market.

Regarding the first research question: '*What are the key drivers influencing customer satisfaction and continued usage of Grab's super app services in Vietnam?*', there are several factors contribute to customer loyalty and satisfaction. Firstly, users generally express high satisfaction with Grab's services, especially ride-hailing and food delivery, which are the most frequently used features of the app. Indeed, according to the survey, these services offer high convenience and accessibility, making Grab an essential part of weekly and monthly routines for many Vietnamese users. Competitive pricing is another critical driver, as Vietnamese consumers are highly price sensitive. To be more specific, Grab's frequent discounts, promotions and loyalty rewards effectively address this need, encouraging repeated usage from users. Combined, these factors create a strong foundation for customer retention, as Grab is able to to meet users' expectations by offering convenience, affordability and reliability. Besides that, put into comparison with Grab's direct competitor - Be super app, which offers similar core services such as ride-hailing and food delivery, Grab maintains a competitive edge due to its diverse service offerings at a much better price range. In other words, Grab is successful in positioning itself as a cost-effective option in a highly price-sensitive market.

Coming to the second research question: '*How does the integration of various services within Grab affect user experience and loyalty compared to using separate single-function apps?*'. The findings of this research suggests that the majority of customers choose Grab instead of other single-function applications, which proves the effectiveness of super app business model.

According to the survey results, the majority of users find it extremely convenient to have multiple services within one app, which justifies why they download Grab alongside other single-function app, but not just the single-function app only. This has undoubtedly gives Grab a strong competitive edge in the market, with a product that offers users a seamless experience that meet various needs of their daily lives. Additionally, Grab's ability to offer competitive pricing and frequent promotions, together with an easy-to-use interface and an optimal savings and rewards program, further distinguishes it from other single-function competitors. This approach is especially effective as Vietnamese users are highly price sensitive and cost-conscious. They tend to download multiple apps to compare prices and choose the best deal in the end. By considering these cost-awareness behaviors and offers attractive pricing and promotions, Grab as a super app has successfully maintained its leading position in the market.

Looking ahead with the third research question: *'What are the potential challenges and opportunities for Grab to expand its super app ecosystem and further penetrate Vietnam's digital economy?'*. The survey responses on customer expectations, growth recommendations and service improvement suggestions has provided valuable insights on Grab's potential obstacles and growth opportunities. Firstly, Grab faces intense competition from rivals such as Be super app, Xanh SM or ShopeeFood - which also have intentions to expand into a super app. Therefore, to maintain its competitive position, customers expect that Grab should continually innovate and diversify its service ranges, such as expand to healthcare and e-commerce services. Also, user continuously demand for more frequent discounts and promotions, suggesting that pricing will remain a vital factor for customer retention in Vietnam market. Given the price-sensitive nature of Vietnam market, it is important for Grab to constantly do research and introduce new promotions. In addition to these, considering an expansion to electric vehicle ride options also present a potential growth opportunity for Grab, as the majority of users are open to and support environmentally friendly options. Moreover, since Grab's competitor Xanh SM is already offering EV ride-hailing services, Grab's entry into this area can not only enhance its brand reputation as a sustainable choice but can also attract a new segment of eco-conscious users. Altogether, by addressing these evolving customer needs, Grab has the potential to further solidify its position and drive strong engagement in Vietnam.

However, several limitations should be acknowledged. First, the use of snowball sampling may have certain level of bias, as the sample relied on the researcher's network, the majority of whom are students with lower-income level. Additionally, the online distribution of the survey

limits participation to specifically digitally connected individuals, which potentially excludes insights from those who may not frequently use social media like Facebook or Messenger.

Future research can address these limitations by using a more diverse and inclusive sampling method, such as stratified random sampling, to ensure larger representation. Additionally, conducting in-depth interviews with non-users and past users can provide more thorough qualitative data and insights. Another suggestion is that future projects can assess the impact on customer usage and satisfaction of specific Grab potential features, such as electric vehicle integration or the effectiveness of new offerings. Further research can also deep dive into the competitive landscape in Vietnam, where other companies have high potential to adopt super app strategies, leading to a much more dynamics and intensively competitive market.

Based on these findings, several recommendations can be made to Grab Vietnam. First, to strengthen loyalty among price-sensitive users, Grab can consider offering tiered loyalty programs with different rewards for frequent users and new customers, or customer using referral programs. Besides that, introducing environmentally friendly options, such as electric vehicles, will also align with the growing demand for sustainable choices, especially when the market now witness the extensive expansion of Xanh SM - Grab's biggest competitor in ride-hailing and taxi service. Finally, as expected by the majority of current users, Grab can invest into product research and development, diversifying its offers to e-commerce, financial services and many more. The above suggested strategies aim to help Grab reinforce its position as a leading super app in Vietnam's competitive market.

All things considered, the findings of this research are crucial in understanding the factors driving user satisfaction and loyalty within the Vietnam super app market, particularly for Grab. By identifying key drivers like convenience, competitive pricing and service diversity, along with customer expectations for sustainable choices, this study provides actionable insights for Grab to develop its product ranges. These insights can support strategic decisions that enable Grab to strengthen its market position, effectively adapt to user needs and win the competitive landscape. This also aims to support Grab in expanding its growth and sustaining its position as a market leader in Vietnam's digital economy.

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APPENDIX

Survey questions: User Experience with Super App Grab: Motivation, Satisfaction and Expectations

Hi everybody! I am Trinh Quynh Chau, a senior student majoring in Omni-Channel Commerce at Budapest University of Business, Hungary. Currently, I am doing my graduation thesis on Grab Super Application in Vietnam. This survey aims to collect your opinions on your experiences, usage motivations, satisfaction levels and expectations for the features and services provided by Grab. The survey will take approximately 10 minutes to complete. All information will be kept confidential and used for research purposes only. Thank you very much for taking the time to participate!

1. Do you agree to allow me to use the information in this survey for research purposes?

- a. Yes, I do
- b. No, I do not

I. Demographic Information

2. What is your current age range?

- a. Below 18
- b. 18 - 24
- c. 25 - 34
- d. 35 - 44
- e. 45 - 60
- f. Above 60

3. What is your gender?

- a. Male
- b. Female
- c. Prefer not to say

4. What is your current occupation?

- a. Student
- b. Full-time employees
- c. Freelancer
- d. Retired
- e. Other

5. What is your current income level?

- a. Below 5,000,000 VND
- b. From 5,000,000 VND to below 8,000,000 VND
- c. From 8,000,000 VND to below 12,000,000 VND
- d. From 12,000,000 VND to below 15,000,000 VND
- e. From 15,000,000 VND to below 20,000,000 VND
- f. From 20,000,000 VND to below 30,000,000 VND
- g. From 30,000,000 VND to above

6. Do you use Grab currently, or did you use Grab before?

- a. I am using Grab
- b. I used Grab before
- c. I have never used Grab

II. Customer behaviour and satisfaction level

A. For those who answer 'I used Grab before' in Question 6

7. If you used Grab before, why did you decide to stop?

- a. I did not satisfy with the service quality
- b. The price is not suitable for my needs
- c. I do not need to use the service regularly anymore
- d. I choose a better service from another brand

8. If you stop using Grab as you choose a better service from another brand, can you please share the name of that brand?

B. For those who answer 'I have never used Grab' in Question 6

7. Why have you never used Grab?

- a. I do not need to use the service offered by Grab
- b. I am more used to services from other brands
- c. My living area does not have Grab

8. If you have never used Grab as you are more used to service from other brands, can you please share the name of that brand?

C. For those who answer 'I am using Grab' in Question 6

7. What are the Grab services that you use? (please choose all that apply)

- a. GrabBike
- b. GrabCar
- c. GrabFood
- d. GrabMart
- e. Grab Express

8. What is one Grab service that you use most frequently? (please choose one)

- a. GrabBike/GrabCar
- b. GrabFood
- c. GrabMart
- d. Grab Express

9. What is your frequency of using Grab?

- a. I use Grab daily
- b. I use Grab weekly
- c. I use Grab monthly
- d. I rarely use Grab

10. On average how many times per week do you use Grab?

- a. I do not use Grab weekly
- b. 1 - 2 times
- c. 3 - 5 times
- d. 6 - 10 times
- e. More than 10 times

11. What are the factors influencing your choice of using Grab? (please choose all that apply)

- a. Driver reliability and professionalism
- b. Variety of service types offered
- c. Short wait times and quick service
- d. Ease of use and smart app features
- e. Attractive promotions and discounts
- f. Reasonable pricing compared to service quality
- g. Convenience in booking rides

12. How convenient do you feel about Grab's integration of multiple services (the ability to use ride-hailing, delivery and e-payment services in one app)?

Please rate on a scale of 1 to 5, where 1 = "Not convenient at all" and 5 = "Very convenient."

13. Among the features of the Grab super app, which do you find most valuable? (please choose one)

- a. Promotions and discounts for various services
- b. Access to multiple services within one app
- c. Variety of payment options (e-wallet, cash)
- d. Smooth and easy user experience
- e. Rewards and loyalty program (GrabRewards)

14. Please rate your satisfaction level with Grab's super app model (providing multiple services on one platform).

Please rate on a scale of 1 to 5, where 1 = "Very dissatisfied" and 5 = "Very satisfied."

15. Please rate your satisfaction level on the each of the below services of Grab.

Please choose either 'I have never used this service' or rate on a scale of 1 to 5, where 1 = "Very dissatisfied" and 5 = "Very satisfied."

- Ride-hailing service (GrabCar/GrabBike)
- Food delivery and grocery shopping service (GrabFood/GrabMart)
- Parcel delivery service (GrabExpress)
- Payment service (digital payment options)

16. To what extent do you agree that Grab's new features have enhanced your app experience?

Please choose either 'I have never used this service' or rate on a scale of 1 to 5, where 1 = "Very dissatisfied" and 5 = "Very satisfied."

- Saving costs (Grab Savings, Grab Rewards)
- Various ride options (GrabCar 4 chỗ, 7 chỗ, GrabCar Plus, GrabCar Tiết kiệm, GrabBike, GrabBike Tiết kiệm, GrabBike Plus)

17. Can you rate your willingness to recommend Grab to others?

Please rate on a scale of 1 to 5, where 1 = "Not at all" and 5 = "Definitely."

III. Competitive Market

18. Overall, how do you rate Grab performance compared to other similar apps or services (e.g. Be, Xanh SM, ShopeeFood)?

Please rate on a scale of 1 to 5, where 1 = "Very badly" and 5 = "Excellent."

19. Of the services below, which application do you choose to use the most for each service? (please choose one brand for each service)

	Grab	Be	Xanh SM	ShopeeFood	None
Ride-hailing (motorbike)					
Taxi					
Parcel delivery					
Food delivery					
Grocery shopping					

20. Besides Grab, do you use other single-function apps to hail a ride (e.g., Xanh SM, traditional taxi)?

- a. Yes, I download these apps to compare prices and choose the one that offers the most reasonable option.
- b. Yes, but I mainly use Grab
- c. No, I only use Grab

21. Besides Grab, do you use other single-function apps to order food and buy groceries (e.g. ShopeeFood)?

- a. Yes, I download these apps to compare prices and choose the one that offers the most reasonable option.
- b. Yes, but I mainly use Grab
- c. No, I only use Grab

22. What makes you prioritize using Grab over single-function applications like Xanh SM or ShopeeFood? (please choose all that apply)

- a. Better and higher quality service
- b. Better user experience (easy-to-use app design)
- c. Shorter wait times
- d. More competitive pricing
- e. Diverse services and features in the app
- f. More promotional codes and discounts

- g. I do not prioritize using Grab over other single-function apps
- h. Other

23. Besides Grab, do you use Be - an application that provides a variety of similar services - to call ride?

- a. Yes, I download Be to compare prices and choose the one that offers the most reasonable option.
- b. Yes, but I mainly use Grab
- c. No, I only use Grab
- d. Other

24. Besides Grab, do you use Be to order food, buy grocery and goods?

- a. Yes, I download Be to compare prices and choose the one that offers the most reasonable option.
- b. Yes, but I mainly use Grab
- c. No, I only use Grab
- d. Other

25. Besides Grab, do you use Be for parcel deliveries?

- a. Yes, I download Be to compare prices and choose the one that offers the most reasonable option.
- b. Yes, but I mainly use Grab
- c. No, I only use Grab
- d. Other

26. Between Grab and Be, which app do you use more often?

- a. I use Grab more often
- b. I use Be more often
- c. I use both Grab and Be a lot
- d. I rarely use both Be and Grab

27. Compared to Be, in what aspects do you feel Grab's service is better?

- a. I do not think Grab is better than Be
- b. More diverse services
- c. More promotions and discounts
- d. More reasonable pricing
- e. Easier-to-use app
- f. Better service quality
- g. Shorter wait times

IV. User suggestion and expectations for Grab

28. In your opinion, what opportunities should Grab explore to stay competitive and grow in the Vietnam market? (please choose all the apply)

- a. Expand electric vehicle (EV) options
- b. Improve loyalty program and rewards
- c. Introduce new services (e.g., healthcare, e-commerce)
- d. Offer more promotions and discounts
- e. Upgrade app interface and features
- f. Other

29. How important do you feel it is for Grab to provide environmentally friendly transportation options (such as electric vehicles)?

Please rate on a scale of 1 to 5, where 1 = "Not important at all" and 5 = "Extremely important."

30. What factors will encourage you to use Grab's electric vehicle (EV) service more often?

- a. Lower electric vehicle fares
- b. Positive environmental impact and carbon reduction
- c. Better ride quality and comfort
- d. Other

31. How would you rate your willingness to pay more for a trip in an electric vehicle (EV) compared to a trip in a conventional gasoline car?

Please rate on a scale of 1 to 5, where 1 = "Not at all" and 5 = "Definitely."

32. Finally, what do you think Grab could improve to better meet your needs?