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Non-Price Competitive Strategy for Challenger Brands in Indonesia's Online Food Delivery Market: A Study of Indahfood in the Anticipated Post-Merger Landscape

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Abstract

Competition in Indonesia's online food delivery market relies heavily on discount-based strategies, and a potential merger between two leading platforms could intensify competitive pressure on challenger brands such as Indahfood. This study examined the relationships between food quality, service convenience, and customer satisfaction, as well as the indirect associations between these factors and customer loyalty through satisfaction. Data were collected through an online questionnaire administered to urban Indonesian consumers who had placed orders with Indahfood within the preceding three months. The responses were analyzed using partial least squares structural equation modeling (PLS-SEM) with SmartPLS software, employing bootstrapping to assess the statistical significance of indirect effects. Service convenience and food quality were positively associated with customer satisfaction, with path coefficients of 0.474 and 0.448, respectively. Together, these factors explained 75.5% of the variance in customer satisfaction. Customer satisfaction was positively associated with customer loyalty, with a path coefficient of 0.857, accounting for 73.5% of the variance in loyalty. Both indirect associations through customer satisfaction were statistically significant, with coefficients of 0.406 for service convenience and 0.384 for food quality. However, the strong association between satisfaction and loyalty should be interpreted cautiously because of limitations in discriminant validity. These findings suggest that Indahfood could strengthen its competitive position by prioritizing delivery speed and reliability while enhancing menu variety and food quality. The findings reflect customer experiences before the potential merger, which serves as the anticipated strategic context rather than an observed market condition.

INTRODUCTION

The online food delivery (OFD) market in Indonesia has experienced remarkable growth, driven by increasing smartphone adoption, growing consumer preferences for convenience, and the expansion of reliable delivery services offering diverse culinary options. This growth accelerated during the COVID-19 pandemic, when mobility restrictions shifted consumer behavior from dining in to ordering food through digital platforms (Statista Market Insights, n.d.). Habits developed during lockdowns, such as ordering lunch at work, dinner at home, and snacks on demand, became established consumption patterns, allowing the market to continue expanding beyond the circumstances that initially accelerated its adoption (Kurniawan et al., 2024). The gross merchandise value (GMV) of online food orders in Indonesia increased from

approximately US$5.4 billion in 2024 to US$6.4 billion in 2025, representing year-over-year growth of approximately 18.51% and positioning Indonesia as the largest OFD market among Southeast Asia's six major economies (Databoks, 2026; Momentum Works, 2026).

The market is dominated by three platforms: Kerenfood, operated by PT Keren and launched in Indonesia in 2015; Jayafood, operated by PT Jaya since 2017; and Indahfood, operated by PT Indah since 2021. Competition among these platforms has been predominantly price-based. To accelerate market penetration and encourage repeat purchases, each platform has attracted consumers through subsidized prices, substantial discounts, and frequent promotional campaigns. Although these strategies have stimulated customer acquisition and transaction volumes, they have also created significant challenges to profitability, as platforms absorb a portion of transaction costs through subsidies. Industry observers have repeatedly warned that excessive dependence on discount-driven competition is financially unsustainable and may undermine long-term profitability (The Jakarta Post, 2022). Consequently, competitive sustainability increasingly depends not only on operational efficiency and business fundamentals but also on access to sufficient financial resources to maintain promotional activities. This environment tends to favor well-capitalized platforms while placing smaller competitors under increasing financial pressure.

These competitive dynamics are reflected in changes in market share between 2023 and 2025. Jayafood maintained its leadership position in terms of GMV, although its market share declined from approximately 50% to 46%. Kerenfood experienced a more substantial decline, from approximately 38% to 31%, a development broadly attributed to its strategic decision to reduce aggressive discounting and prioritize profitability. In contrast, Indahfood increased its market share from approximately 7% to 23%, establishing itself as the third-largest OFD platform in Indonesia (Momentum Works, 2026).

A potentially significant structural transformation may further reshape this competitive landscape. In 2025, PT Jaya was reportedly engaged in advanced negotiations to acquire PT Keren, the parent company of Kerenfood (IDN Financials, 2025; Reuters, 2025). If completed, the proposed merger could create a combined entity controlling approximately 77% of the market's GMV. Such consolidation could provide the merged company with a substantially larger nationwide delivery network, a more integrated ecosystem encompassing ride-hailing, digital payments, and financial services, and greater financial resources than its competitors. As a challenger brand, Indahfood may face considerable difficulties matching the scale of discounts and subsidies potentially offered by the combined entity. Developing a sustainable competitive strategy that emphasizes non-price attributes is therefore increasingly important and constitutes the primary motivation for this study.

Indahfood is the OFD service operated by PT Indah, an established digital commerce platform that expanded into on-demand food delivery in 2021. The company leveraged several existing competitive assets that were difficult for newer competitors to replicate, including a substantial customer base that could be converted into food delivery users at relatively low marginal customer acquisition costs, an established digital payment system through IndahPay, and recurring shopping festivals and promotional campaigns that could be extended to food delivery services. Despite entering the market several years after Kerenfood and Jayafood, Indahfood has demonstrated the fastest growth among the three platforms. Nevertheless, its competitive position remains relatively concentrated and potentially vulnerable compared with

that of a merged KerenJaya entity. Indahfood lacks a comparably extensive ride-hailing network and integrated financial services ecosystem, operates with a smaller delivery partner network that is more concentrated in urban areas, and relies primarily on its corporate parent to finance expansion. These characteristics make Indahfood a relevant case for examining how a rapidly growing challenger brand can address structural competitive disadvantages in an anticipated post-merger market. Accordingly, this study focuses on Indahfood as its primary case while exploring strategic implications that may also be relevant to other emerging OFD competitors facing similar market conditions.

The central business question concerns how Indahfood can compete effectively without relying heavily on discounts and subsidies. Previous research on Indonesian consumers indicates that customer loyalty is influenced not only by price but also by the quality of the overall service experience, particularly food quality and delivery convenience. Suhartanto et al. (2019) identified food quality as the strongest direct predictor of customer loyalty, while Rombach et al. (2023) found it to be the strongest antecedent of customer trust. These findings suggest that improvements in food quality, including greater menu variety, broader restaurant partnerships, and better taste, combined with faster and more reliable delivery services, could contribute to stronger long-term customer loyalty. However, the application of these findings to competitive strategies for challenger brands in Indonesia's anticipated post-merger OFD market remains insufficiently explored for two principal reasons. First, a substantial portion of the existing evidence originates from the COVID-19 pandemic (Prasetyo et al., 2021), when health concerns, mobility restrictions, and supply chain disruptions may have influenced consumers' evaluations of service attributes. Consequently, whether similar relationships among service quality, customer satisfaction, and loyalty persist under normal post-pandemic market conditions remains uncertain. Second, previous studies have predominantly examined consumers across multiple platforms or the broader OFD market rather than focusing specifically on challenger brands competing against larger, more established market leaders.

This study addresses these research gaps by examining the relationships between food quality, represented by menu variety and taste, and service convenience, represented by delivery speed and reliability, and customer satisfaction, as well as the relationship between customer satisfaction and customer loyalty among Indahfood users in Indonesia. Specifically, the study seeks to answer two research questions: (1) How are food quality and service convenience associated with customer satisfaction among Indahfood users? and (2) How is customer satisfaction associated with customer loyalty toward Indahfood? The findings are expected to provide practical insights for Indahfood's management in identifying non-price service attributes that warrant strategic investment. Additionally, the study aims to offer relevant implications for restaurant partners, delivery partners, and policymakers interested in promoting a fair and competitive OFD market under a potential post-merger industry structure.

Given the study's time and resource constraints, several boundaries are established to maintain a clearly defined analytical scope. First, the research focuses on the consumer perspective, specifically Indahfood users, while excluding the direct perspectives of delivery partners, merchants, and platform operators from primary data collection. Second, the independent variables are limited to two non-price dimensions derived from the framework proposed by Triyuni et al. (2021), namely food quality and service convenience. Price, promotional activities, and other potentially relevant constructs, including trust and perceived

value, are not incorporated as explanatory variables in the research model. Third, the study is situated within the post-pandemic period and does not directly quantify the effects of the COVID-19 pandemic; comparisons with pandemic-era research are therefore conceptual and analytical rather than empirical. Fourth, the research aims to identify and prioritize non-price competitive attributes rather than develop a specific pricing or subsidy strategy. Finally, the anticipated merger provides the strategic context for investigating non-price competitive advantages rather than an observed market condition evaluated empirically. Primary data were collected before any potential merger, and implications for the anticipated post-merger competitive environment are therefore developed through strategic interpretation of the empirical findings rather than direct observation of post-merger market outcomes.

METHOD

This study employed a quantitative approach within a positivist paradigm to examine the relationships among food quality, service convenience, customer satisfaction, and customer loyalty among Indahfood users in Indonesia's online food delivery (OFD) market. Hypotheses were tested using statistical analysis of empirical data (Sekaran & Bougie, 2019). The methodology encompassed the research design, data collection procedures, and data analysis techniques.

Research Design

This explanatory study tests the hypothesized relationships using data from questionnaire surveys (Sekaran & Bougie, 2019). As shown in the research framework (Figure III.1), the study starts from the researcher's observation of intense OFD competition in Indonesia, driven by subsidies and by the strategic pressure a challenger brand such as Indahfood would face in a post-merger environment. This observation is deepened through secondary information and market reports to confirm the relevance of non-price quality attributes. A literature review then identifies theoretical gaps, from which the conceptual framework, research questions, and objectives are developed. Data are collected through an online questionnaire and analyzed using descriptive analysis, Partial Least Squares Structural Equation Modeling (PLS-SEM), hypothesis testing, and indirect effect analysis. The study concludes with a summary and recommendations that contribute to quality–loyalty theory and offer managerial insight for challenger brands.

Data Collection Method

Primary data are obtained through an online questionnaire distributed via social media and online communities, which allows wider reach and faster data collection than other methods (Sekaran & Bougie, 2019). Secondary data come from books, journals, articles, and market reports, which support the development of the framework and hypotheses. The target respondents are urban Indonesians who are familiar with mobile applications and have ordered food from Indahfood within the last three months, regardless of gender, age, or profession. The minimum sample size was determined with a priori G*Power analysis (Faul et al., 2009), using a medium effect size ($f^2 = 0.15$), a significance level of 0.05, power of 0.80 (Cohen, 1988), and two predictors of the endogenous construct (customer satisfaction predicted by food quality and service convenience), which yielded a minimum of 68 respondents (Figure III.2). To obtain more stable results, the study targets 200 respondents, which also exceeds the ten-

respondents-per-item rule of thumb (150 respondents for the fifteen indicators) (Sekaran & Bougie, 2019).

The questionnaire has four parts (Table III.1). The first is a screening part asking whether the respondent has ordered from Indahfood in the last three months and which OFD applications are mostly used; only Indahfood users are included in the analysis. The second covers the frequency of using OFD in general and Indahfood specifically. The third measures the four constructs on a seven-point Likert scale from strongly disagree to strongly agree. Food quality (FQ1–FQ4) covers menu variety, choice of restaurant partners, and taste; service convenience (SC1–SC4) covers delivery speed, reasonable delivery time, driver availability, and on-time arrival; customer satisfaction (CS1–CS3) covers getting what is wanted, exceeded expectations, and overall satisfaction; and customer loyalty (CL1–CL4) covers continued use, recommendation, positive reviews, and willingness to keep using Indahfood despite price increases. The items are adapted from Suhartanto et al. (2019), Triyuni et al. (2021), Parasuraman et al. (2005), Berry et al. (2002), Oliver (1980, 1999), Cronin et al. (2000), and Rombach et al. (2023). The fourth part collects respondent profiles: gender, age, occupation, education, and monthly food expenses.

Data Analysis Method

Collected data are first edited, screened for missing data, normality, and outliers (Hair et al., 2022), and then coded for classification and interpretation (Sekaran & Bougie, 2019). Descriptive analysis then summarizes respondent profiles and the frequency and mean of each research variable (Sekaran & Bougie, 2019).

Hypothesis testing uses PLS-SEM in SmartPLS, which suits complex theoretical models in social science, maximizes explained variance in the outcome variables, and can estimate models with an intervening construct, as customer satisfaction is here (Hair et al., 2022). Evaluation follows two steps (Hair et al., 2022). The measurement (outer) model is assessed through outer loadings (above 0.70 with $p < 0.05$, while 0.40–0.70 is acceptable if removal does not improve composite reliability or AVE), indicator reliability (squared loadings of about 0.50, with items below 0.40 considered for deletion), internal consistency (Cronbach's alpha and composite reliability above 0.70), convergent validity (AVE above 0.50), and discriminant validity. Discriminant validity is checked with the Fornell–Larcker criterion and the Heterotrait–Monotrait (HTMT) ratio, with thresholds of 0.85 for conceptually distinct constructs and 0.90 for similar ones (Henseler et al., 2015). HTMT is further inferred through bootstrapping with 10,000 subsamples (one-tailed, 0.05), where validity is confirmed when the upper bound of the 95% confidence interval does not include 1 (Franke & Sarstedt, 2019; Henseler et al., 2015).

The structural (inner) model is then assessed through collinearity (VIF ideally below 3, with 5 and above indicating a problem), the magnitude and significance of path coefficients (β) via bootstrapping, the coefficient of determination (R^2), effect size (f^2, with 0.02, 0.15, and 0.35 as small, medium, and large), and predictive relevance (Q^2 above 0). Both β and R^2 are interpreted as weak (up to 0.10), modest (0.11–0.30), moderate (0.30–0.50), or strong (above 0.50). Finally, the indirect effects of food quality and service convenience on customer loyalty through customer satisfaction are examined with bootstrapping. Because the model has no direct path from the quality constructs to loyalty, the focus is on the significance and magnitude

of these indirect effects. The results are interpreted in Chapter IV and translated into a business solution and implementation plan for Indahfood.

RESULTS AND DISCUSSION

PLS & SEM

PLS SEM used to evaluate & analyze the theoretical correlation in social science (Hair & Alamer, 2022). Figure IV.1 explains the SEM graphical result of this research. For assessing the PLS SEM in this research it is divided into 2 sections that consist of measurement (outer) model and structural (inner) model.

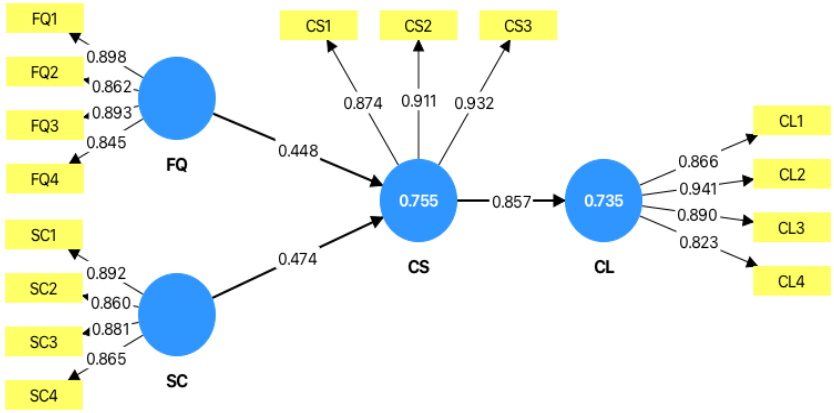


Figure 1. SEM Graphical Result

1. Measurement (Outer) Model

Below are the five steps to measure outer model

a. Outer loading & p-value value

Acceptance outer loading value is greater than 0.70 but loading values between 0.40-0.70 is still acceptable (Hair & Alamer, 2022). Table IV.6 shows calculation of this research with outer loading mostly above 0.70. Variables higher than 0.70 shows that the indicators strongly measured the construct.

Table 1. Outer Loading

	Code	Outer Loading	Criteria
Food Quality	FQ1	0.898	Strong
	FQ2	0.862	Strong
	FQ3	0.893	Strong
	FQ4	0.845	Strong
Service Convenience	SC1	0.892	Strong
	SC2	0.860	Strong
	SC3	0.881	Strong
	SC4	0.865	Strong
Customer Satisfaction	CS1	0.874	Strong
	CS2	0.911	Strong
	CS3	0.932	Strong
Customer Loyalty	CL1	0.866	Strong
	CL2	0.941	Strong
	CL3	0.890	Strong
	CL4	0.823	Strong

P-value represents the probability that null hypotheses are true with the acceptance score needing less than 0.05 (Hair & Alamer, 2022). Table 2 shows that P values of this research are smaller than 0.05 that explain that statistically significant relationship between variables.

Table 2. P Values

	P-values	Criteria
Food Quality ==> Customer Satisfaction	0.000	Significant
Service Convenience ==> Customer Satisfaction	0.000	Significant
Customer Satisfaction ==> Customer Loyalty	0.000	Significant

b. Indicator Reliability

This indicator shows how much construct explains variance of the indicators. The value is obtained by squaring the outer loading and the acceptance score is 0.5. Table 3 explains the calculation of the indicator reliability that is higher than 0.5. The highest indicator reliability is CL2 that explains 88% of the variance indicator.

Table 3. Indicator Reliability

	Code	Outer Loading	Indicator Reliability	Criteria
Food Quality	FQ1	0.898	0.806	Acceptable
	FQ2	0.862	0.743	Acceptable
	FQ3	0.893	0.797	Acceptable
	FQ4	0.845	0.714	Acceptable
Service Convenience	SC1	0.892	0.796	Acceptable
	SC2	0.860	0.740	Acceptable
	SC3	0.881	0.776	Acceptable
	SC4	0.865	0.748	Acceptable
Customer Satisfaction	CS1	0.874	0.764	Acceptable
	CS2	0.911	0.830	Acceptable
	CS3	0.932	0.869	Acceptable
Customer Loyalty	CL1	0.866	0.750	Acceptable
	CL2	0.941	0.885	Acceptable
	CL3	0.890	0.792	Acceptable
	CL4	0.823	0.677	Acceptable

c. Internal consistency reliability

Construct internal consistency reliability displayed in Table 4 by assessing Cronbach's Alpha and composite reliability. The measurement used for the reliability test is Cronbach's Alpha that needs to be greater than 0.7 (Sekaran & Bougie, 2019). For composite reliability scores need to be greater than 0.7 (Hair et al., 2022). Cronbach's Alpha and Composite Reliability score for the research is greater than 0.7 that indicate all variable constructs are reliable.

Table 4 Construct Reliability

	Cronbach's Alpha	Composite Reliability
Food Quality	0.898	0.929
Service Convenience	0.898	0.929
Customer Satisfaction	0.891	0.932
Customer Loyalty	0.903	0.933

d. Validity Test

Construct validity test by assessing convergent and discriminant validity to analyze concept correlation with AVE as a measurement with score need to be larger than 0.50 (Hair et al., 2022). Higher AVE indicates the stronger construct being captured. Table 5 shows that

all scores of AVE calculation higher than 0.50 this indicates the variables represent the construct.

Table 5. Convergent Validity

	AVE
Food Quality	0.765
Service Convenience	0.765
Customer Satisfaction	0.821
Customer Loyalty	0.776

Discriminant validity is used to check if the construct is different from other constructs with a Fornell-Larcker score of the construct needed higher than other variables (Hair et al., 2022). Table 6 explains discriminant validity using Fornell-Larcker and the results explain that all variables constructed are greater than other variables. Therefore, the construct has a strong relationship with itself rather than other constructs.

Table 6. Discriminant Validity (Fornell-Larcker)

	Customer Loyalty	Customer Satisfaction	Food Quality	Service Convenience
Customer Loyalty	0.881			
Customer Satisfaction	0.857	0.906		
Food Quality	0.745	0.816	0.875	
Service Convenience	0.814	0.822	0.777	0.875

e. Discriminant Validity

Discriminant validity is how empirically different a construct is from the other constructs in the model. The evaluation was done based on the Heterotrait–Monotrait ratio of correlations (HTMT) which is believed to be more sensitive for the detection of a lack of discriminant validity than the Fornell–Larcker criterion (Henseler et al., 2015). An HTMT value below 0.85 indicates discriminant validity for conceptually distinct constructs, while a more liberal threshold of 0.90 is applied to constructs that are conceptually similar (Hair et al., 2022; Henseler et al., 2015).

The HTMT values for all pairs of constructs are presented in Table 7 Below the 0.90 threshold are two pairs, Service Convenience–Food Quality (0.863) and Food Quality–Customer Loyalty (0.827). The remaining four exceed 0.90, Food Quality–Customer Satisfaction (0.910), Service Convenience–Customer Satisfaction (0.912), Service Convenience–Customer Loyalty (0.902) and the highest, Customer Satisfaction–Customer Loyalty, reaches 0.953

Table 7. Discriminant Validity (HTMT)

	Customer Loyalty	Customer Satisfaction	Food Quality	Service Convenience
Customer Loyalty				
Customer Satisfaction	0.953			
Food Quality	0.827	0.910		
Service Convenience	0.902	0.912	0.863	

Since several values are above the point-estimate cut-off, discriminant validity was further assessed using HTMT inference where a bias-corrected 95% bootstrap confidence

interval (10,000 subsamples, one-tailed) is calculated for each HTMT value. Discriminant validity is achieved when the upper bound of the confidence interval (97.5%) does not include the value of 1, indicating that the correlation between two constructs is significantly different from 1 (Franke & Sarstedt, 2019; Henseler et al., 2015). The results are given in Table 8

The upper confidence bounds for five of the six pairs of constructs are less than 1 (from 0.918 to 0.985), confirming the empirical distinctiveness of these constructs as shown in Table IV.13. The same applies to the three pairs with point estimates just over 0.90, their confidence intervals still exclude 1. The only exception is the pair of Customer Satisfaction-Customer Loyalty with HTMT value 0.953 with confidence interval [0.882, 1.008]. Discriminant validity is not established for this pair since the upper bound exceeds 1. This suggests a close conceptual proximity between customer satisfaction and customer loyalty in line with previous online food delivery research (Oliver, 1999) and is discussed as a limitation in Chapter V.

Table 8. Confidence Intervals Bias Corrected

Construct Pair	HTMT	2.50%	97.50%	Discriminant Validity
Food Quality ↔ Customer Satisfaction	0.910	0.811	0.985	Supported
Service Convenience ↔ Customer Satisfaction	0.912	0.833	0.979	Supported
Service Convenience ↔ Customer Loyalty	0.902	0.81	0.968	Supported
Service Convenience ↔ Food Quality	0.863	0.748	0.946	Supported
Food Quality ↔ Customer Loyalty	0.827	0.705	0.918	Supported
Customer Satisfaction ↔ Customer Loyalty	0.953	0.882	1.008	Not supported

2. Structural (Inner) Model

Below are the five steps for assessing structural (inner) models

a. Checking The Model Collinearity

Collinearity at the indicator level is checked by looking at the Variance Inflation Factor (VIF) of each item. some collinearity between indicators should be expected in reflective measurement models since the items are supposed to represent the same underlying construct. Hence, the VIF is not used as a foundation for removal of the items (Hair et al., 2022). VIF value less than 5 is acceptable and VIF value more than 5 may indicate redundancy and need detailed examination (Hair et al., 2022). As can be seen in table 9 All signs suggest VIF is less than 5 except for CL2 (VIF = 5.140) which is slightly above the threshold. CL2 is retained as it has the highest outer loading of 0.941 in the Customer Loyalty construct and its removal would reduce the measurement quality without enhancing the discriminant validity. Moreover, the collinearity analysis on the structural model shows that all predictor VIF values (Food Quality = 2.50, Service Convenience = 2.50) are well below 3 indicating that collinearity does not influence the estimation of the path coefficients (Hair et al., 2022).

Table 9. Variance Inflation Factor

	Code	VIF	Criteria
Food Quality	FQ1	3,047	Acceptable
	FQ2	2,340	Acceptable
	FQ3	2,981	Acceptable
	FQ4	2,183	Acceptable
Service Convenience	SC1	2,955	Acceptable
	SC2	2,645	Acceptable
	SC3	3,000	Acceptable
	SC4	2,674	Acceptable
Customer Satisfaction	CS1	2,199	Acceptable
	CS2	2,925	Acceptable
	CS3	3,279	Acceptable
Customer Loyalty	CL1	3,217	Acceptable
	CL2	5,140	Retained
	CL3	2,888	Acceptable
	CL4	2,029	Acceptable

b. Path Coefficients

Path Coefficients is used to analyze effects for each variable relationship (Hair et al., 2022). Here are categorised for path coefficients (**β**) :

Weak : 0 - 0.10
Modest : 0.11 - 0.30
Moderate : 0.31 - 0.50
Strong : > 0.50

Table 10 explains that path coefficient for this research, for Food Quality ⇒ Customer Satisfaction and Service Convenience ⇒ Customer Satisfaction show moderate relationship and for Customer Satisfaction ⇒ Customer Loyalty shows strong relationship.

Table 10. Path Coefficients

	Path Coefficient	Criteria
Food Quality ==> Customer Satisfaction	0.448	Moderate
Service Convenience ==> Customer Satisfaction	0.474	Moderate
Customer Satisfaction ==> Customer Loyalty	0.857	Strong

c. Coefficient of Determination (R^2)

Coefficient of determination is used to check no collinearity and how dependent variables predicted the independent variable (Hair et al., 2022). Coefficient of determination will be evaluated by using R^2score with the indicators :

Weak : 0 - 0.10
Modest : 0.11 - 0.30
Moderate : 0.31 - 0.50
Strong : > 0.50

The results of Table 11 show a good explanatory power of the endogenous constructs. The R^2 of Customer Satisfaction is 0.755, meaning food quality and service convenience contribute to 75.5% of its variance. The R^2 for Customer Loyalty is 0.735, meaning customer satisfaction explains 73.5% of its variance. However, the high R^2for Customer Loyalty should be interpreted with caution given the limited discriminant validity between customer satisfaction and customer loyalty reported earlier.

Table 11. R-square

	R-square	Criteria
Customer Loyalty	0.735	Strong
Customer Satisfaction	0.755	Strong

d. The Effect Size (f^2)

The effect size (f^2) shows the contribution of each predictor to explaining an endogenous construct. According to Hair et al. (2022), f^2 is considered small (0.02), medium (0.15), and large (0.35). Table 12 shows that food quality (f^2 = 0.325) has large effect on customer satisfaction and service convenience (f^2 = 0.363) has a large effect. Customer satisfaction has a very large effect on customer loyalty (f^2 = 2.768). This very high value is primarily due to the strong overlap between customer satisfaction and customer loyalty mentioned above and should be read with caution rather than as a sign of an unusually strong effect.

Table 12. Effect Size f^2

	Effect Size f^2	Criteria
Food Quality ==> Customer Satisfaction	0.325	Large
Service Convenience ==> Customer Satisfaction	0.363	Large
Customer Satisfaction ==> Customer Loyalty	2.768	Large

e. Predictive Relevance (Q^2)

Predictive relevance is used to measure predictive power (Hair et al., 2022). If the score is greater than 0.0, the model has predictive relevance in endogenous constructs. All the indicators of Customer Satisfaction and Customer Loyalty have Q^2 predict values greater than zero, between 0.457 to 0.704. This confirms the predictive relevance of the model for the endogenous constructs ,

Table 13. Predictive Relevance Q^2

	Code	Q^2
Customer Satisfaction	CS1	0.537
	CS2	0.553
	CS3	0.704
Customer Loyalty	CL1	0.496
	CL2	0.565
	CL3	0.558
	CL4	0.457

Hypothesis Testing

Test statistics and P-value will be calculated and analysed to test the Hypothesis (Hair et al., 2022). For t-statistics value to exceed 1.96 explain that variables have significant relationship & the p-value score requires to be smaller than 0.05 that explain the correlation between variables is significant and hypothesis can be supported. (Hair et al., 2022). In addition, path coefficient will be used to analyze strength and relationship between variables. Table 14 shows the calculator of path coefficient, t-statistics, and p-value. From the calculation all hypotheses from H1 - H3 are accepted.

Table 14. Hypothesis Testing

Hypothesis & Path	Path coefficient	t-statistics	p-value	Decision
H1 : Food Quality ==> Customer Satisfaction	0.448	4.628	0.000	Accepted
H2 : Service Convenience ==> Customer Satisfaction	0.474	5.600	0.000	Accepted
H3 : Customer Satisfaction ==> Customer Loyalty	0.857	26.252	0.000	Accepted

Here are the analysis for hypothesis for this research

H1 : Food quality (menu variety and taste) has a positive effect on customer satisfaction at Indahfood

Path coefficient of 0.448 explained moderate positive relationship of food quality with customer satisfaction. The relationship is statistically significant with t-statistics at 4.628 and p-value < 0.05, therefore H1 is accepted. This finding is aligned with the previous studies that explained that food quality is a key driver of satisfaction in the online food delivery context (Suhartanto et al., 2019; Triyuni et al., 2021). Indahfood services have higher customer satisfaction due to wider menu options and better taste of the food.

H2: Service convenience (delivery speed and reliability) positively impacts customer satisfaction at Indahfood .

The path coefficient of service convenience ⇒ customer satisfaction is 0.474. This indicates the moderate positive association. The relationship is significant at t -statistic 5.600 and p-value < 0.05 so H2 is accepted. Of the two quality constructs, service convenience has a slightly stronger influence on satisfaction than food quality. This is in line with the perspective that speed and reliability of delivery are basic fulfillment attributes that shape customer evaluation of a service (Parasuraman et al., 2005; Rombach et al., 2023). It means that Indahfood customers are more satisfied with the faster and more reliable delivery.

H3: Customer satisfaction has a positive effect on customer loyalty to customers of Indahfood.

The path coefficient indicates that customer satisfaction and customer loyalty has a positive strong of 0.857. The relation is highly significant with t-statistic 26.252 and p-value < 0.05, therefore H3 is accepted. This supports the quality–loyalty logic that satisfied customers are more likely to continue using, repurchase and recommend the service (Oliver, 1999; Rombach et al., 2023). However, this path should be taken with caution because the discriminant validity assessment in Section IV.1.2 suggested a high degree of overlap between customer satisfaction and customer loyalty, the size of this effect thus somewhat reflects the strong empirical relationship between the two constructs in this sample.

Mediation Analysis

In addition to the direct effects tested, the indirect effects of the two quality constructs on customer loyalty through customer satisfaction are also being conducted. The mediation was assessed using the indirect path coefficient, standard deviation, t-statistic, p-value, and bias-corrected 95% confidence interval (CI). The indirect effect is significant if the t-statistic is greater than 1.96, the p-value is less than 0.05 and the 95% CI does not contain zero (Nitzl et al., 2016). In the proposed model, the path from Food Quality or Service Convenience to Customer Loyalty is not direct. Thus, the analysis was about the specific mediating effect of Food Quality and Service Convenience on Customer Loyalty through Customer Satisfaction.

Table 15. Indirect Effect

Hypothesis & Path	Path coefficient	Std Dev	t-statistics	p-value	95% CI (Bias Corrected)	Decision
Food Quality ==> Customer Satisfaction ==> Customer Loyalty	0.384	0.084	4.574	0.000	[0.211, 0.533]	Accepted
Service Convenience ==> Customer Satisfaction ==> Customer Loyalty	0.406	0.077	5.277	0.000	[0.273, 0.577]	Accepted

The effects are both positive and statistically significant as shown in Table IV.20. Food quality has an indirect effect on customer loyalty through customer satisfaction ($\beta = 0.384$, $t = 4.574$, $p < 0.05$). The bias-corrected 95% CI [0.211, 0.533] does not include zero. Service convenience also has an indirect effect on customer loyalty through customer satisfaction ($\beta = 0.406$, $t = 5.277$, $p < 0.05$) with a 95% CI of [0.273, 0.577]. In line with previous evidence that quality attributes affect loyalty via satisfaction and not directly (Renaldi et al., 2024; Siddiqi et al., 2024), the model was specified as a fully mediated structure with no direct paths from the quality constructs to loyalty. This specification indicates that both specific indirect effects are positive and significant. This means that the food quality and service convenience increase customer satisfaction, thereby increasing loyalty. Direct paths were not estimated, so the design cannot rule out a residual direct effect, thus, the fully mediated structure is a modeling assumption based on prior work and future research is needed to explicitly test the direct paths. Customer satisfaction is the way in which non-price quality attributes affect loyalty, subject to this constraint, and is directly relevant to the objective of this study of identifying non-price levers of a challenger brand.

Business Solution

This section translates the empirical findings into business solutions for Indahfood as a challenger brand seeking non-price sources of competitive advantage in the expected post-merger market. Solutions are derived from descriptive analysis, PLS-SEM, hypothesis testing and mediation analysis. Solutions are prioritized based on the strength of each empirical relationship.

Both quality indicators are important drivers of customer satisfaction, but with different weights. Service convenience has the highest influence ($\beta = 0.474$; $f^2 = 0.363$, a large effect) followed by food quality ($\beta = 0.448$; $f^2 = 0.325$). Together, these two non-price indicators explain 75.5% of the variance in customer satisfaction ($R^2 = 0.755$) and the model shows predictive relevance for both endogenous constructs (Q^2 predict > 0). Because satisfaction completely mediates the path to loyalty (indirect effects of 0.384 and 0.406), these indicators generate loyalty with their impact on satisfaction. All the initiatives below are designed as non-price indicators, improving the customer experience via food quality and service convenience improvement rather than discounts or subsidies, which a merged could sustain for longer.

For a challenger, this prioritization is strategically important. The lowest rated loyalty item was the willingness to continue using Indahfood even if the price goes up (CL4, mean=5.61). This result shows that the current loyalty is price-sensitive. It supports the need to build loyalty on experience and not on price. The two workstreams work in parallel as

convenience of service is taken care of by the driver operations team and food quality is taken care of by the marketing and business development teams.

1. Strengthening Service Convenience

The most significant driver of customer satisfaction was service convenience (β = 0.474; f^2 = 0.363). Delivery speed received the lowest descriptive score (SC1, mean = 5.90), which is the most urgent area to improve. Indahfood cannot compete with the subsidies of a merged, so these initiatives stimulate delivery performance with operational efficiency instead of price cuts:

Optimization of the delivery radius (nearby express zone). Indahfood can introduce an express delivery option that focuses on merchants within a short radius (e.g. up to 5km) from the customer. According to Li et al. (2025), based on the analysis data from one of the three largest Online Food Delivery (OFD) platforms in China, merchants density is positively related to delivery reliability. Limiting the fulfillment distance results in quicker and more manageable estimated delivery times, which directly increases delivery speed (SC1) without increasing delivery cost. That makes geographic efficiency, not subsidy, a speed advantage.

Service guaranteed, with accurate ETA. Indahfood can improve the accuracy of the ETA by showing and backing it up with a commitment that if the guaranteed ETA is not met, the customer is rewarded with a little compensation like voucher or credit. A more accurate ETA improves delivery reliability and the guarantee builds trust. It is aligned with previous research from Salari et al. (2022) accurate delivery time is critical to manage customer satisfaction. This operates as a reliability mechanism instead of a routine subsidy of price, as compensation is triggered only on failure.

Continue to onboard new drivers. Indahfood will not be able to compete against the driver pool a combined KerenJaya will command, so the aim isn't to win on scale but to boost driver density where there is demand. Based on the previous research from Taylor (2018), on demand service platforms connect waiting time sensitive customers with other independent service providers, therefore delay can reduce the benefit that received by customer from the service. Indahfood can selectively speed up onboarding in high-order density areas, so supply can meet demand at peak times, shortening waiting and delivery times without the cost of nationwide expansion. This makes driver coverage a targeted efficiency play, not a capital intensive arms race the challenger cannot win .

2. Enhancing Food Quality

The second driver of customer satisfaction is food quality (β = 0.448; f^2 = 0.325) operationalized through menu variety and taste. These initiatives reinforce customers' perception of food quality and how they access it:

Navigation in food categories (variety discovery). Indahfood can categorize its menu into clear food categories (e.g. chicken, fish, vegetables, rice dishes and beverages), making it easier to browse and discover the existing variety of the platform. Although categorization does not increase the number of merchants, it makes the existing variety more visible (FQ1, FQ2), allowing customers to find suitable options more quickly and reinforcing the perception of a wide selection. According to Mogilner et al. (2008), categories can make customers perceive more variety and be more satisfied with their choice especially when customers are unfamiliar with the available options.

Merchant acquisition and menu expansion. Indahfood can continue to expand its restaurant partners and diversify them to be able to boost actual varieties by focusing on popular and exclusive local merchants. This directly supports the variety dimension (FQ1, FQ2) which is controlled by the platform through merchant acquisition. Based on previous research from Armstrong (2006) regarding two sided markets, the value of a platform for one group of users depends on the number of users from the other group.

Food Quality Review & Action Loop Verified. Based on previous research from Mayzlin et al. (2014), review platform that only allow verified customers to post review are less exposed to review manipulation than platform where anyone can post. When an order is fulfilled, customers are able to provide feedback to the merchant with Indahfood , including ratings, comments, photos and individual menu item ratings. Indahfood can improve the current review system by separating comments about food quality and comments about order accuracy or fulfillment as driver ratings are already separated from merchant ratings. For instance, comments like "the food was not tasty", "the food was not fresh" or "the portion was too small" should be captured in the food quality assessment while missing items or wrong menu items should be classified as order accuracy or fulfillment issues.

This would prevent feedback that is not directly related to food quality from unnecessarily affecting a merchant's food quality score. This could enable Indahfood to provide more granular performance scores for merchants or menu items. For example, a merchant might have a food quality score of 5.0 due to positive comments about flavor and freshness, but a lower order accuracy score of 4.5 because sometimes the order is missing items or has incorrect items. With these differentiated scores, Indahfood can provide customers with more credible information and merchants with a clearer view of the specific areas that need improvement. This categorized feedback can then be leveraged to enable merchant improvement.

For example, persistent negative feedback on food quality may lead to a merchant review and corrective actions, and then to performance monitoring to assess whether the problem has improved. Conversely, merchants or menu items that receive repeated positive feedback on their food quality can be rewarded with food-quality badges or recommendations. Thus, consumer feedback can be a source of information not only for customers but also an input for merchant improvement and performance recognition

Implementation Plan & Justification

This section describes the plan to implement the proposed business solutions. The 5W + 1H approach (What, Who, Where, When, Why, How) is used and then the program timeline. The two workstreams are parallel. The service convenience is headed by the Driver operation team, while the food quality is headed by the marketing and business development team.

1. 5W + 1H Framework

5W + 1H framework is used to translate the proposed business solution into an actionable program. The framework was chosen because this framework can break down each initiative into a complete set of questions. This framework also can make the plan clearly defined including what will be done, who is responsible, where and when the initiative will be implemented, why it is needed, and how it will be carried out. Jia et al. (2016) suggest that the 5W+1H framework can help the users identify different aspects of the plan systematically instead of addressing each aspect separately.

Table 16. 5W + 1H Strengthening Service Convenience

Element	Description
What	Optimization of the delivery radius (nearby express zone), service guaranteed with accurate ETA, and continue to onboard new drivers
Who	Driver operations, logistics, algorithm, & product team
Where	Driver dispatch system, in-app ETA/tracking feature, high-demand urban zones
When	October'26 - March'27 (parallel with food quality workstream)
Why	Service convenience has the largest effect on satisfaction (β = 0.474; f^2 = 0.363), delivery speed is the weakest item (SC1, mean = 5.90), and driver supply is the dimension most exposed to a merged KerenJaya
How	Launch an express option for merchants within ≤5 km, improve ETA accuracy and add a missed-ETA compensation, accelerate driver onboarding in high-order-density areas

Table 17. 5W + 1H Enhancing Food Quality

Element	Description
What	Navigation in food categories (variety discovery), merchant acquisition and menu expansion, and verified customer reviews (taste assurance)
Who	Marketing, business development team, and product team.
Where	App homepage and menu-browsing interface, merchant onboarding pipeline, and in-app review system
When	October'26 - March'27 (parallel with service convenience workstream)
Why	Food quality is a driver of satisfaction (β = 0.448; f^2 = 0.325) and the highest rated item is variety (FQ1, mean = 6.16) and is platform controlled, whereas verified reviews underpin the taste dimension (FQ3, FQ4)
How	Add clear food categories to discover, on-board more and exclusive merchants, restrict reviews to verified purchasers to increase credibility

CONCLUSION

The model demonstrated substantial explanatory power, with food quality and service convenience jointly explaining 75.5% of the variance in customer satisfaction (R^2 = 0.755), while customer satisfaction explained 73.5% of the variance in customer loyalty (R^2 = 0.735). The findings are presented below according to the respective research questions.

RQ1: How do food quality (menu variety and taste) and service convenience (delivery speed and reliability) affect customer satisfaction among Indahfood users in Indonesia's online food delivery market? The results indicated that both variables had positive and statistically significant relationships with customer satisfaction. Service convenience demonstrated a slightly stronger association (β = 0.474; f^2 = 0.363), followed by food quality (β = 0.448; f^2 = 0.325). These findings suggested that faster and more reliable delivery services, along with greater menu variety and better food quality, were associated with higher customer satisfaction among Indahfood users. Both predictors also demonstrated predictive relevance (Q^2_predict > 0). Therefore, H1 and H2 were supported.

RQ2: How does customer satisfaction influence customer loyalty toward Indahfood? The results revealed a strong, positive, and statistically significant relationship between customer satisfaction and customer loyalty (β = 0.857; t = 26.252; p < 0.05), supporting H3. Because the structural model specified full mediation, the relationships between food quality and service convenience and customer loyalty were modeled as indirect pathways through customer

satisfaction. The specific indirect effects were statistically significant, with coefficients of 0.384 for food quality and 0.406 for service convenience. These findings suggested that non-price service attributes were indirectly associated with customer loyalty through their positive relationships with customer satisfaction.

However, discriminant validity between customer satisfaction and customer loyalty remained a concern, as the heterotrait–monotrait ratio of correlations (HTMT) reached 0.953, with its confidence interval marginally including 1. This result indicated insufficient evidence of discriminant validity between the two constructs. Consequently, the strong relationship between customer satisfaction and customer loyalty should be interpreted cautiously because of potential conceptual and empirical overlap between the constructs. Further details are provided in Section V.2.3.

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CONFLICT OF INTEREST

The author states that there are no conflicts of interest, whether personal, commercial, or financial, that can affect the implementation and results of this study.

AUTHOR'S CONTRIBUTION

Rudolf Patar Mangiring Purba contributes to research design, data collection and processing, system development, result analysis, and article manuscript preparation.

GENERATIVE ARTIFICIAL INTELLIGENCE USAGE STATEMENT

In the process of compiling this article, the author uses generative artificial intelligence (AI) as a tool in language refinement, writing structure, and grammar improvement. The use of AI is carried out on a limited basis and remains under the supervision of the author. All data, analysis, interpretation, and scientific substance in this article have been checked and verified by the author. The author is solely responsible for the accuracy, authenticity, and final content of the manuscript.

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