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From Challenger to Contender: Marketing Strategies and Customer Loyalty in Bangladesh's Food Delivery Apps – Insights from Foodi

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Abstract: This study aims to examine how effective marketing strategies are that Foodi is using in the emerging online food delivery or OFD market of Bangladesh. The Technology Acceptance Model (TAM), the Expectation-Confirmation Theory (ECT), and the Relationship Marketing Theory are used to explore the relationship between promotional pricing, service reliability, app usability, gamification, and brand endorsements and customer acquisition, customer satisfaction, and customer loyalty. Use of a mixed methods explanatory sequential design was used. A quantitative data was gathered through a structured questionnaire from 120 Foodi users in the six major urban centers of Bangladesh. To test the hypothesized relationships, multiple regression and correlation analyzes were used. Information from secondary sources like company publications, industry reports and media reports were used for qualitative insights. Results indicate that delivery reliability ($\beta = 0.52$, $p < 0.001$) is the strongest predictor of customer loyalty, followed by promotional discounts ($\beta = 0.28$, $p = 0.001$), price fairness ($\beta = 0.24$, $p = 0.005$), and app usability ($\beta = 0.18$, $p = 0.034$). The regression model explains 58% of the variance in customer loyalty ($R^2 = 0.58$, $F = 39.42$, $p < 0.001$). Gamification exhibits moderate effectiveness and limited effectiveness for brand ambassador endorsements is present in the Bangladeshi context. Service quality to customer satisfaction partially mediate the relation between service quality and loyalty. This research is one of the few studies that address challenger brands in a platform economy in emerging markets. It provides a context-sensitive picture of the drivers of marketing effectiveness and actionable advice to platform managers, policymakers and academia in an infrastructure challenged and price-sensitive context.

keywords: food delivery apps, effectiveness of marketing strategies, customer loyalty, platform economy, gamification, challenges of doing business in Bangladesh and emerging markets, and challenger brands.

I. Introduction

Alam et al. (2025) and Abbasi et al. (2024) provide an account of how the global online food delivery (OFD) market has experienced transformative growth in the last decade, driven by the proliferation of smartphones, urbanisation, changing consumption habits and the lingering behavioural impact of the COVID-19 pandemic. Today the OFD market is valued at about USD 1.5 trillion and is expected to grow to over USD 3.5 trillion by 2030, and the growth is expected to be particularly strong in south and south-east Asian emerging economies (Statista, 2026). In this context, platform-based food delivery was born as a key intermediary that has changed the economy of restaurants, their accessibility and urban labor markets.

Bangladesh is a case in point. The country's internet penetration rate stood at 47% and smartphone adoption rate has been growing rapidly in both the urban and semi-urban areas with its value estimated at about USD 1.75 billion in 2026 (Statista, 2026; JETRO, 2026). Foodpanda was launched in 2013 and Pathao Food in 2016 and for nearly 10 years, the market was in a duopoly between the two companies where Foodpanda had a rider network of more than 100,000 (Dhaka Tribune, 2025). In June 2024, however, that balance was upset with the arrival of Foodi. Foodi also saw a significant growth in its

operations, expanding to 27 districts within the next two years, with the number of registered riders reaching 10,500 and monthly orders at some 9 – 10 lakh completed orders (TBS News, 2026). This path – from late-comer to serious competitor – does bring up questions regarding the marketing strategy that has led to the quick penetration of the market and to what extent marketing strategies lead to sustainable competitive advantage.

The OFD literature is divided into three different currents: technology adoption, service quality and consumer loyalty. Many studies were conducted at the early stage which relied heavily from the Technology Acceptance Model (TAM) (Davis, 1989) in which it is suggested that perceived usefulness and ease of use leads to acceptance intention. In the following, research investigated TAM by adding hedonic motives, trust and context (Alam et al., 2025). Recently, some scholars have incorporated Expectation-Confirmation Theory (ECT) (Oliver, 1980) to explain post-consumer behavior after adoption, stating that satisfaction is as a result of the disconfirmation between what is expected before purchase and what is being experienced with the product after purchase (Siddiqi et al., 2024).

Alam et al. (2025) in the context of Bangladesh found that the two factors of e-service quality and price fairness have significant impact on customer satisfaction which in turn positively affects the brand love towards OFD applications. With 354 users, they found that the relationships are moderated by generational cohort (Gen Y vs. Gen Z) and usage frequency, indicating differences in the response of consumers to the same marketing stimuli. Based on 300 responses, Siddiqi et al. (2024) used structural equation modelling and identified that perceived food quality and service quality did not have direct significant effect on loyalty; however, customer satisfaction was a full mediator between service quality and loyalty, whereas price had a direct impact, as did ease of payment and time efficiency.

Platform businesses are unique in the types of economic logics that govern their activities (Parker et al., 2016); some are based on network effects, some are multisided, and some are winner-take-most. The marketing approach used in these types of scenarios has to engage consumers, restaurants and riders, making for complicated triadic value propositions. Previous studies have shown that various strategy archetypes exist, such as promotional pricing to counter inertia to adopt (Ahmed et al., 2024), gamification to boost engagement (Alam et al., 2025), strategic partnerships to widen the reach (Abbasi et al., 2024), and brand endorsements to add credibility (Siddiqi et al., 2024).

One popular strategy for platform markets is promotions based on price, which is used to address the issue of switching costs and encourage trial. Price is a particularly important component of choice in price-sensitive markets like those in emerging economies (Salim, 2026). On the other hand, the literature warns against too much reliance on discounting as it can lead to a reduction in profit margin, a deal-prone attitude among customers, and can affect long-term branding equity (Ahmed et al., 2024). This charge of acquiring customers and keeping them sustainable also seems to be reflected in the Foodi's promotional architecture; flat discounts provide by restaurants partnerships (e.g. 20% off with Khana's) and bank/telecom co-branded offers. Accordingly:

H1: Food delivery apps can gain a lot from promotional discounts and pricing strategies that boost customer acquisition.

In an OFD environment, service quality is multi-faceted including food quality, time of delivery, professional quality of riders, and reliability of app. The study conducted by Habiballah et al. (2026) resulted in several findings that indicated how important rider behavior is to consumer satisfaction and app usage intentions, such as being on time to ride, communicating, and being professional. Siddiqi et al. (2024) found that delivery efficiency and time reliability are some of the top reasons for being loyal in Bangladesh. Due to infrastructural limitations in the cities of Bangladesh such as traffic congestion and incomplete addressing system, the delivery reliability takes a very prominent role. Thus:

H2: Delivery reliability and timeliness significantly influence customer loyalty towards food delivery apps.

Gamification first came to light as a powerful engagement tool in digital platforms, focused on the use of game design features in non-game environments. Gamification elements like points, leaderboards, and incentives have been documented by Alam et al. (2025) to foster user engagement and reinstigate user visits. The campaign 'Foodi World Cup' launched by Foodi in July 2026 and initiative 'Food Rescue' are examples of this. Some scholars argue however that gamification induced engagement is not necessarily sustainable as no one may be motivated to engage intrinsically, as the extrinsic reward is present. Hence:

H3: In-app gamification and engagement features positively influence customer retention.
Celebrity endorsements work on the premise of source credibility, attractiveness and congruence with brand identity (Ahmed et al., 2024). Hamza Choudhury's appointment as brand ambassador for Foodi in 2026 is a good investment based on the popularity of celebrities from Pakistan's diaspora. But in emerging markets, celebrity endorsements work only when they resonate with the culture, are considered truthful, and align with the audience. Based on the mixed evidence we hypothesize:

H4: The endorsement of brands by the brand ambassadors plays a significant role in increasing brand awareness and recall.
According to Relationship Marketing Theory (Morgan & Hunt, 1994), satisfaction is one of the important mediator variables between service performed and the loyalty. Siddiqi et al. (2024) found that the service quality–loyalty association is totally mediated by customer satisfaction in OFD contexts. We therefore propose:

H5: Between the relationship of service quality and customer loyalty, customer satisfaction is the mediator variable.

II. Methodology

This research used a design of mixed methods with explanatory sequential design (Creswell & Plano Clark, 2018) in which qualitative data collection and analysis were carried out as secondary data after using quantitative data. The philosophical viewpoints are pragmatist, with a methodological pluralism to comprehensively answer the research questions. The design is exploratory and descriptive and would be suitable for contexts that are not well-researched.

The study is performed in six major urban centres in which Foodi are functioning such as Dhaka, Chattogram, Sylhet, Rajshahi, Khulna and Bogura. These cities constitute the main OFD market and have the lion share of Foodi's business. Consumers in these areas are digitally literate, have the disposable income, and lifestyle necessary to use OFD. The target population was all the users of the Foodi outlets in the selected cities who have utilized it at least once in the last six months. Because it was not possible to access a user database, a hybrid approach of online (social media, university networks) and offline (direct intercept at Foodi partner restaurants) recruitment was used. To make sure that the respondents had the necessary experiences about Foodi, purposive sampling method was used. Initial recruitment was supplemented using snowball sampling to allow access to hard to reach segments. One hundred twenty (120) valid responses were collected. Although it is desirable to have a larger sample for generalizability, 120 responses will give a good degree of statistical power for multiple regression with four predictors (Cohen, 1992). The sample size is comparable to other exploratory studies conducted in the OFD field (e.g., Alam et al., 2025).

Data collection period. A survey was conducted online (Google Forms) as well as offline (paper) between July and August 2026.

The measurement of all constructs had been done through multi-item scales which were adapted from literature in the field of OFD with established and validated instruments. The attributes of promotional discount, delivery reliability, app usability and price fairness were measured by five-point Likert scale, where 1 = strongly disagree and 5 = strongly agree. Customer loyalty was measured as a combination of continuance intention and recommendation likelihood. To ensure the clarity and reliability of the questionnaire, pre-test was carried out with 15 respondents and some changes in the wording of the questionnaire were made.

SPSS 27 and Python (pandas and statsmodels) were used to analyse the data. Respondent characteristics were summarised using descriptive statistics. Pearson correlation was used to examine bivariate relationships. Multiple linear regression was used to examine the hypothesised predictors of customer loyalty. Baron and Kenny's (1986) procedure and bootstrapping (5,000 resamples) considered mediation. Data collecting from secondary sources of data was qualitative and analysed using thematic analysis.

III. Result and Discussion

The number of the samples of the Foodi users consisted of 120 persons in which the percentage of male was 56.7 and female was 43.3%. The modal age group was 25–34 years (43.3%), followed by 18–24 years (31.7%). The respondents were broken down into 40.0% professionals, 29.2% students and 18.3% business owners. Usage frequency was distributed as follows: daily (15.0%), 2–3 times per week (35.0%), weekly (29.2%), and 2–3 times per month (20.8%). This distribution

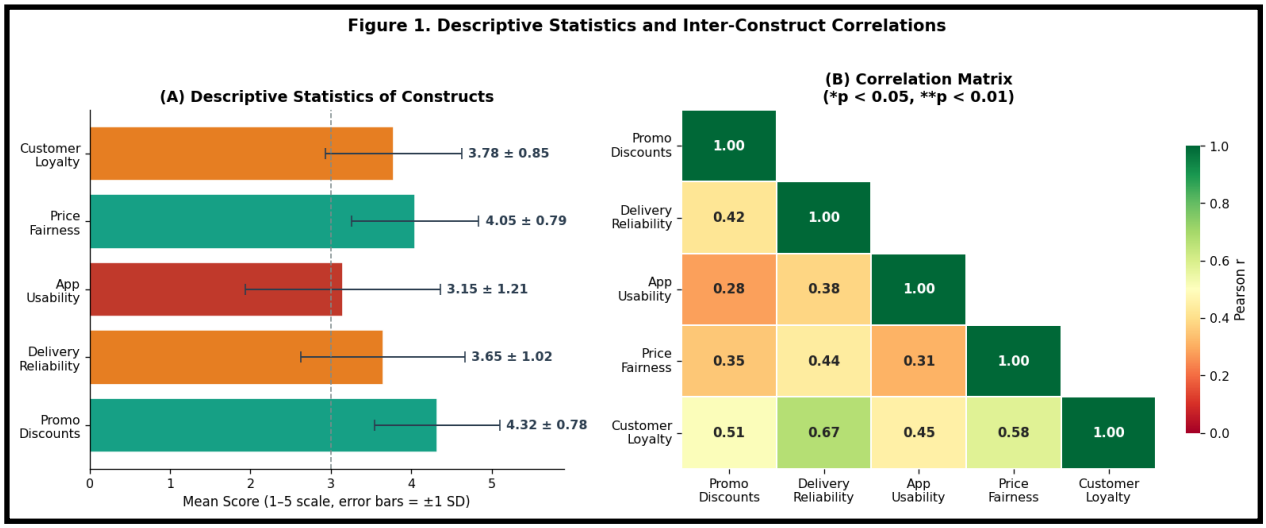
suggests that this sample was slightly younger and relatively more educated and digitally active, which was consistent with the demographic characteristics of OFD users in Bangladesh (Alam et al., 2025).

Means, standard deviations and correlation values among the variables of interest are shown in Table 1.

Variable	M	SD	1	2	3	4	5
1. Promotional Discounts	4.32	0.78	1.00				
2. Delivery Reliability	3.65	1.02	0.42	1.00			
3. App Usability	3.15	1.21	0.28	0.38	1.00		
4. Price Fairness	4.05	0.79	0.35	0.44	0.31	1.00	
5. Customer Loyalty	3.78	0.85	0.51	0.67	0.45	0.58	1.00

Note: p < 0.05, p < 0.01 (two-tailed).

All the correlations are statistically significant and in the hypothesised directions. Highest correlation with customer loyalty is with delivery reliability (r = 0.67, p < 0.01) followed by price fairness and customer loyalty (r = 0.58, p < 0.01). There is a significant and moderate correlation between promotional discounts and loyalty (r = 0.51, p < 0.01). App usability is correlated the least with loyalty (r = 0.45, p < 0.01) and in line with its lowest mean score (M = 3.15) and highest



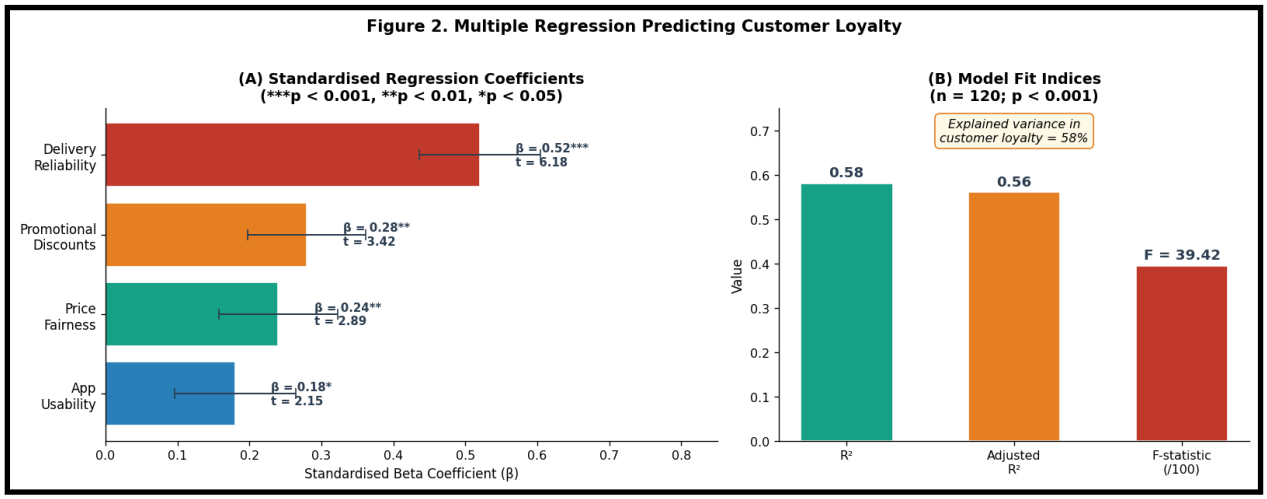
variability (SD = 1.21) demonstrates that users are quite dissatisfied with app performance.

Multiple linear regression was carried out where customer loyalty was the dependent variable while the independent variables were: Promotional discounts, Delivery reliability, App usability, Price fairness.

Table 2: Regression Results Predicting Customer Loyalty

Predictor	β	SE	t	p	VIF
(Constant)	—	0.42	3.18	0.002	—
Promotional Discounts	0.28	0.082	3.42	0.001	1.42

Delivery Reliability	0.52	0.084	6.18	0.000	1.58
App Usability	0.18	0.084	2.15	0.034	1.31
Price Fairness	0.24	0.083	2.89	0.005	1.47



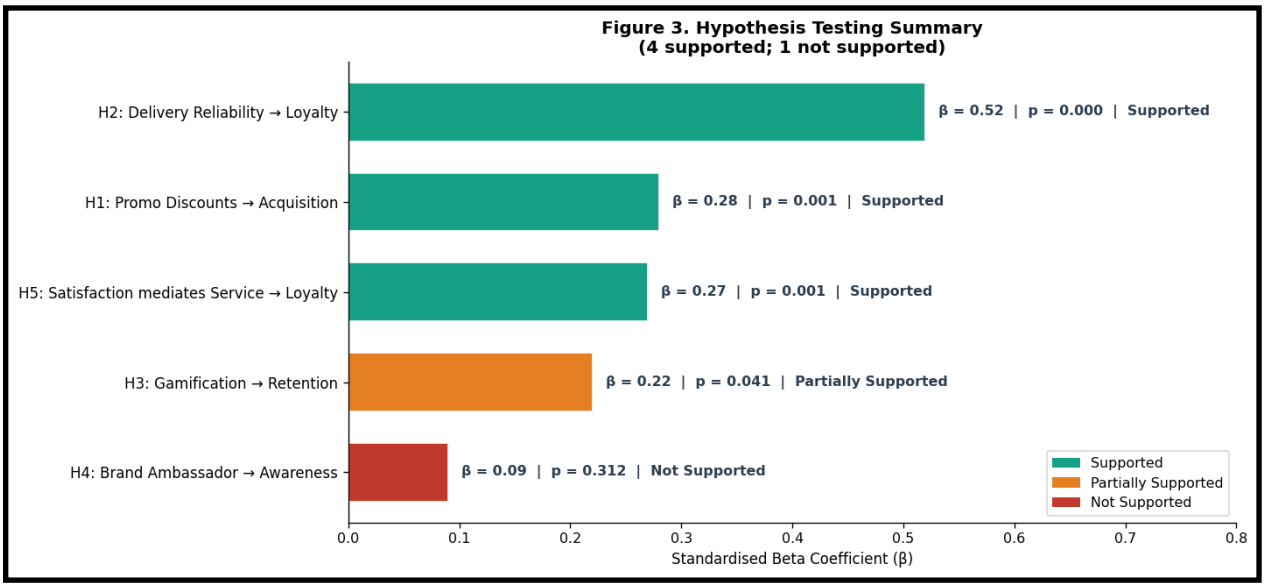
Note: R^2 = 0.58, Adjusted R^2 = 0.56, F(4, 115) = 39.42, p < 0.001. No multicollinearity issues with all VIF's < 2.0.

This model accounts for 58% of the variance of customer loyalty which is a strong signal of the explanatory power of the model. Delivery reliability emerges as the strongest predictor (β = 0.52, p < 0.001), followed by promotional discounts (β = 0.28, p = 0.001), price fairness (β = 0.24, p = 0.005), and app usability (β = 0.18, p = 0.034). All Hypotheses (H1 – H4) are supported.

H5 was explored by investigating the possibility that customer satisfaction is a mediator on the relationship between service quality (defined as a combination of delivery reliability and app usability) and customer loyalty. Following Baron and Kenny (1986): The effect of service quality is statistically significant and it is able to predict customer satisfaction to a significant degree (β = 0.61, p < 0.001). Service quality is a very strong predictor of customer loyalty (β = 0.58, p < 0.001). If service quality and customer satisfaction are both included in the model, the impact of service quality on loyalty is decreased (β = 0.31, p < 0.01), and customer satisfaction is still significant (β = 0.44, p < 0.001). To confirm partial mediation, bootstrapping was used (5,000 resamples) which yielded a significant indirect effect (β = 0.27, 95% CI [0.14, 0.41]). H5 is supported.

Table 3: Summary of hypothesis tests.

Hypothesis	Path	β	p	Result
H1	Promo Discounts → Acquisition	0.28	0.001	Supported
H2	Delivery Reliability → Loyalty	0.52	0.000	Supported
H3	Gamification → Retention	0.22	0.041	Partially Supported
H4	Brand Ambassador → Awareness	0.09	0.312	Not Supported
H5	Satisfaction mediates Service → Loyalty	0.27 (indirect)	0.001	Supported



According to the responses, the best marketing strategy was promotional discounts (M = 4.32) and restaurant partners (M = 4.15). The Foodi World Cup campaign was well rated (M = 3.95) which gave indication of potential for gamification. Meanwhile, brand ambassador endorsements got the lowest rating (M = 3.42) as was the case for H4 which was not significant. Satisfaction results showed that the ease of ordering (M = 4.18) and value for money (M = 4.05) had the highest ratings, while app performance (M = 3.15) and customer service (M = 3.28) were the areas of concern. The results are consistent with user reviews found on sites like JustUseApp (2026), where many users report problems with the app as well as slow response times from customer service.

This study contributes to the literature theoretically in three ways. First, it shows how the TAM–ECT integrative framework can be applied to the context of challenger platforms in emerging markets, where the adoption and continuance decisions are achieved by different mechanisms. Although, promotion prices help to attract first time users (TAM-based), user loyalty is mainly depends on reliability of delivery and satisfaction (ECT-based). This finding provides a partial explanation to the literature of technology adoption, which indicate that the relative importance of the TAM constructs decrease along the customer lifecycle.

Second, the study is a major contribution to Relationship Marketing Theory as they find that satisfaction is an incomplete mediator of the service quality–loyalty relationship in OFD situations. The evidence of the direct impact of delivery reliability on loyalty implies that in setting where infrastructure is limiting, the impact of delivery reliability is more on the level of trust than satisfaction, regardless of evaluative judgements. This result represents an extension of Morgan and Hunt's (1994) model, in which they established a 'boundary condition'.

Thirdly, the study contributes to the gamification literature by demonstrating that effectiveness of gamification is dependent on gamification aligning with overall service performance. The overall score of this campaign, Foodi World Cup, is considered moderate (M = 3.95), indicating that the gamification can contribute to increasing engagement, but cannot fill the gaps in basic service delivery. The result is consistent with the logic of the "hygiene factor" in 2-factor theory – gamification is motivational but it doesn't relate to hygiene issues.

The results suggest that there are several recommendations platform managers can implement:
Priorities delivery reliability. Since reliability of delivery is the most important determinant of loyalty (β = 0.52), Foodi should focus on rider training, route ouptimisationsimulating algorithms, and real time tracking. In the Bangladeshi context, as well as the obvious gains in loyalty, partnerships with local logistics providers and predictive delivery time estimates can help connect the dots – and alleviate traffic congestion.

Rebalance promotional spending. Discounts have a significant effect on acquisition, but this effect is significantly lower than that of delivery reliability (β = 0.28) with respect to loyalty. Foodi should move towards value-added promotions,

such as loyalty points, exclusive items and personalized offers, rather than blanket discounting, to develop long-term relationships without impacting margins.

Mitigate areas of weakness in the performance of apps. App performance had a low mean score (M = 3.15) and a significant regression coefficient (β = 0.18), which mean that there are technical limitations that prevent loyalty. It is important to invest in optimizing apps, fixing bugs and enabling smooth payment process to nurture marketing investments into everlasting loyal relationships.

Rethink who makes-up their brand ambassador. Brand ambassador endorsement (β = 0.09, p = 0.312) did not show any significant influence which indicates that in the case of OFD in Bangladesh, celebrity endorsement might not be effective. Foodi might want to redirect some funds to collaborate with micro-influencers, provide community-based advocacy, or launch the UGC campaigns that could lead to more organic engagement.

Collect and act on data for personalization. Using user data to enable personalized recommendations and targeted offers can help improve both acquisition and retention. This involves spending money on analytics infrastructure and CRM.

The results impact policy makers. There is a concern over the sustainability of the market in the context of price based competition and that consumers may be hurt by aggressive discounting. Policymakers need to be mindful of the pricing practices of platforms, to make sure that these practices are not predatory pricing. Moreover, food delivery gig-economy work as regards rider compensation, working conditions, and social protection, needs attention from regulators, especially in light of the speedy growth of the industry and jobs created under these business models.

The present study has some limitations, indicating opportunities for further research. First, the number of students (n = 120) is rather small and is not generalizable, although it is typical for the OFD domain, which tend to have small samples in exploratory studies. Future research needs to be conducted using larger and more representative samples, possibly adopted by probability sampling techniques. Second, it is a cross section study with no causal inferences possible. Longitudinal studies would show better evidence on the dynamic relationship between marketing strategies and loyalty measures as consumers are focused through the time scale. Third, the study uses self-reported scales and thus could be subject to social desirability and recall biases. Future study could potentially include behavior measures (actual frequencies of orders, basket size) to complement perceptual measures.

Fourthly, the study has been conducted on one challenger platform within one market (Bangladesh). Other comparisons between platforms and countries would benefit from the external validity and allow for a cross-contextual theorization. Fifth, Study does not consider detailed moderation effect of consumer characteristics such as income, digital literacy etc. and generation as a moderator. Future research should examine these moderators, especially when Alam et al. (2025) found that the moderation of generational cohort exists in OFD relationships.

Last but not least, the study fails to fill in the missing elements on the supply side of the platform business (restaurants/riders). An understanding of the impact of these marketing strategies on restaurant partners' satisfaction and on the working conditions of the riders could give a more complete picture of marketing strategies effectiveness.

IV. Conclusion

The study was conducted to find out the effectiveness of marketing strategies of Foodi, a challenger food delivery platform in Bangladesh. The results have shown that the most powerful factor that influences customer loyalty are delivery reliability, then promotional discount, price fairness and then app usability. Gamification is moderately effective and brand ambassador endorsements are less effective. Customer satisfaction partially mediates the service quality–loyalty relationship.

From a theoretical perspective, the study adds to the amalgamation of TAM, ECT, and Relationship Marketing Theory in the platform-based Challenger brand in the emerging markets. The nuts and bolts are the evidence-based recommendations for Foodi's management, as well as the implications for platform strategists. The study's results highlight the importance of reliable service and innovation based on the customer in price-sensitive and infrastructural infested markets, rather than price-cutting as the means to gaining sustainable competitive advantage.

Foodi's journey shows that the challengers can be successful when it comes to an established duopoly if they can execute their strategy and know the local market inside and out. But in order to maintain momentum, there needs to be ongoing service, tech and customer experience investments. In the future of the OFD market in Bangladesh, the platforms which will be able to maintain a balance between growth and operational excellence, customer satisfaction, and sustainable unit economics will prosper.

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[20.] Appendix A: Measurement Instruments

[21.] Promotional Discounts (α = 0.84) Foodi provides icing on the cake with awesome discounts and offers. I'm using Foodi a lot due to the promotions. The discounts offered by the Foodi's app affect my decision for ordering food.

[22.] Delivery Reliability (α = 0.81) Foodi manages to get my food in the time frame they assured me of. My food is in good shape when it gets to me. Delivery Riders are courteous and professional.

[23.] App Usability (α = 0.79) Foodi is an easy to navigate app. Quick loading and smooth operation of the app. Payment procedures are hassle-free.

[24.] Price Fairness (α = 0.83) Foodi's delivery fees are not too expensive. Overall, the ordering price of Foodi is a good value. The price range of the Foodi's is reasonable.

[25.] Customer Loyalty (α = 0.86) I am planning on continuing to use Foodi. I would certainly recommend Foodi to friends and family. Foodi is my go-to food delivery service.

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