

Service Quality of Indonesia's Cellular Communication Providers and The Impact on Customer Loyalty an Analysis of the College Students Using Prepaid Services in Bandung

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Abstract---The cellular providers continually develop their strategy to maintain their customer. As part of the service-based business, they usually focus on how to increase their service in order to get the higher customer loyalty level. This is important for the mobile business especially in Indonesia where the customer is easily persuaded by the price strategy. The research analyzes the service quality of the five providers; IM3, XL, Three, Kartus, and Simpati. We study the service quality effect in building the customer loyalty. This is a quantitative research and we use descriptive and causal method to explain the issues. We use 600 respondents from college student who already becomes the cellular customer.

The research found that the service quality perceived by the student customer is rather high (74.32%) and the perceived loyalty also at high level (66.78%). This means the customer is happy with the service provided and they are loyal to the providers of their choices. We found the service quality has positive and significant effect on loyalty ($\text{Sig. } .000 < 0.05$). But when partially measured, only tangible, reliable, and empathy dimensions which have positive and significant effect. Overall the impact brought by service quality on customer loyalty is rather strong ($R = 0.576$), which is more than 0.5 and contributes as big as 33.2% in developing the loyalty. The rest are determined by other factors.

The cellular provider should concern about their marketing program and they must address all dimensions equally. They need to focus on developing services which are unique and attractive. Failing to do so could harm their performance because the competitor is ready to take their market and turn the customer into their own. In this demanding world of business, the provider should focus on what makes people choose their product. Without the deep understanding about the customer, then the marketing effort will be worthless and in the end the organization will lose their opportunity.

Keywords---Service Quality, Customer Loyalty, Cellular Communication, Services Marketing

I. INTRODUCTION

THE competition between cellular providers in Indonesia is very tight. The decline of the average revenue per user (ARPU) and the high level of churn rate described the condition. Each provider kept losing their customer every time the competitors put an interesting marketing effort.

This is associated with the social relationship, when the person close to you can affect your choice of brands or products. The type of customer which is susceptible to change is students. They affect each other regarding what brand, product, and style. Students constitute the biggest portion of market share for providers [1]. Besides, the students also become good target market because their active life. Increasing phenomenon of social media helps the cellular providers easily promote their service, especially data consumption.

The research focuses on the prepaid services because providers tend to concentrate their effort on this type of product. Hairato & Hidayat [2] argue that the cellular provider will rely on the prepaid service for their business. Wahono [3] also emphasizes the domination of the prepaid over the post-paid product in cellular. The cellular providers still depend on the prepaid customers, because it consists of more than 77% of total cellular customers. One of the examples on how the provider concerns about the prepaid is that Telkomsel has 140 million prepaid users from the total 143 million users [4]. The 2014 annual report from Indosat also showed this domination, they had 62 million prepaid users compared to just 800,000 post-paid users.

In order to maintain or keep their customer from shifting to others, they have to perform great services. One of the important points for cellular providers is the availability of the network. That is why Telkomsel will add 15,000 of BTS adding the previous 85,000. Indosat now has 40,756 BTS [5] and XL Axiata possesses 52,000 BTS [6]. While Three Hutchison serves more than 38 million users with 15,000 BTS [7].

While BTS is important for the wide range of coverage, the providers should also focus on the signal strength. This means they need to improve their backbone as well. Coverage is important, but without the good connection then the coverage is just numbers. Customers rely on the good connection, especially at this social media boom. The only thing important for the customer is they have to have a good connection, everywhere, anytime, and whenever they need it, always.

With this thought in mind, the providers force to race against each other to provide great services, which consist of the network/connection, the quick response for each problem, handling complaints at the service point, predicting when is the right time to increase their resources, and also to keep up with cellular technology development. For example, now providers are pushed to move up to 4G which requires big investment without the certainty of the payback.

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The dilemma and the intense competition in cellular business are interesting to study so we can identify what is the best or appropriate action to choose when handling such dynamic business environment. That is why we chose to explore the effect of service quality towards the customer loyalty.

II. LITERATURE REVIEW

Marketing defined as a way to manage the mutual relationship between organizations and their customers [8]. The main purpose of the marketing activities is to attract new customers. The effort also intended to enhance and develop the previous customers by offering interesting value and providing great services. Marketing is a process where organization can create more value and build relationship with their customers [8]. So we can assume that marketing is planned and continuous activities conducted by an organization in order to maintain their relation with customers. Marketing consists of several activities such as promotion, advertising, designing the product, placing the product, and also pricing the product in a way that can attract the customer's attention. The goal is to put the product or brand in the mind of the target market and make them want to buy. And this buying decision will recur in the future.

There are at least two types of marketing, the tangible products and services. Since our discussion is about the cellular providers, so we focus on the service marketing. [9] consider the service as 'any act or performance one party can offer to another that is essentially intangible and does not result in the ownership of anything.' Zeithaml and Bitner [10] argue that the service is an act, process, and performance resulted from individual/group for the benefit of other entities. The service is intangible but can be perceived by others. The consumption of the service does not result in the exchange of the product ownership. The cellular customers only buy the services provided. Some of the services include the network, other infrastructures, the process, and the security. Service considered as an important factor for the organization in order to build competitive advantages. In fact, great service can become the ultimate weapon to beat the competitors. There are four characteristics which differ and distinguish service marketing from the product, intangibility, inseparability, heterogeneity, and perishability [10]. When we talk about service we talk about process. The hotel for example. The interaction begins when the customer made the booking. Follow by their arrival at the parking lot, at the receptionist, the meals, the cleanliness of the rooms, and the comfort of their sleep. These ongoing processes will end when the customer leave the hotel. For several distinguished hotels, they even maintain the interaction long after their customers leave the hotel. They send gift, flowers, or anything that can remind the customer about the experience when they were stay at the hotel.

That is why, Mudie & Pirrie [11] explain quality of service as the achievement towards the standard of services. They explain the quality as the key factor which differences of the expected product performance and the reality. Service quality can become the key factors for the organizations to enhance their market share [10]. The organizations which perform exceptional service for the customer or at least met their customer demand will definitely win the heart and mind of the customers.

The five dimensions of the service quality from the Parasuraman, Zeithaml, and Berry [9]; [10] and Zeithaml et al [12] will be used for this discussion. The first is the tangibles or physical aspect which include building, design, layout, the furniture, interior, promotion materials, correspondence materials, and the quality of the human resources. The second, reliability which refers to the consistency and dependability of the performances. The organization should provide the same level of service time after time. The third, responsiveness, where the organization must ensure that the employees always ready to provide required services. The fourth, assurance which refers to the competence of the organization to provide comfort for customers. To build the competence organization must develop knowledgeable and skillful employees. Fifth, empathy where the company should understand their customers' needs and make their services easily accessible to their customers. These five dimensions must be applied simultaneously in order to manage their customers and their market share better. Only then, the company can satisfy their customer and finally result in the loyalty.

Nowadays, the concept of satisfaction alone is not enough. The organization needs loyal customers [10]. Loyal customers are the one that willing to recommend the services to others, they will come back or buy more product. Organization must develop strategy to build the mutual relationship with their customers. This kind of relations will develop into a feeling of trust that can lead to the loyalty. Remember that this cannot build in a day. It needs constant attention and effort to build the trust. But in the end the effort will be rewarding. The loyal customer has positive effect for the organizations [8] and [13].

Griffin [14] argues that loyalty relates with the behavior. Loyalty is the emotional and business attachment towards an organization [10]. The behavior which reflect the loyal customer according to Griffin [14] are buy more frequently, buy other products from the company, willing to give references or recommendation, and they will withstand from competitor's offering. In this case, if customers are loyal to the provider XYZ, then he/she will actively promote the product to others. That is why building loyalty is important for business organization. They need to ensure their service quality is already fit with the customers' expectation or even better exceed it.

To ensure that this research is on the right framework, we present several previous papers about the service quality and loyalty. Ivanauskienė & Volungėnaitė [15] found that service quality has significant effect on loyalty. They revealed that the three dimensions of service quality; personal interaction, policy and product quality have a positive impact on customer loyalty across household retail markets. Meanwhile, Keng et al [16] also found that the service quality dimensions that play a significant role in this equation are reliability, empathy, and assurance. This research used bank customer and indicate the overall respondents give positive evaluation, yet still plenty of room for each banks to improve the services. Shpëtim [16] also found that the higher levels of service quality lead to higher levels of customer loyalty. Obeidat et al [17] using multiple regression analysis and found all of the dimensions in the service quality (tangible, reliability, responsiveness, assurance, and empathy) have significant effect on loyalty. The strongest of them all is the empathy dimensions. Several others paper who reveal the same conclusion are

Pollack [18]; Yavas & Babakus [19]; Yuen & Chan [20]; Auka et al [21]; and Howarth et al [22].

Based on the previous articles and the theory we have these hypotheses:

H_{0a}: The tangible, reliability, responsiveness, assurance, and empathy simultaneously has no significance effect towards the customer loyalty

H_{1a}: The tangible, reliability, responsiveness, assurance, and empathy simultaneously has significance effect towards the customer loyalty

H_{0b}: The tangible has no significance effect towards the customer loyalty

H_{1b}: The tangible has significance effect towards the customer loyalty

H_{0c}: The reliability has no significance effect towards the customer loyalty

H_{1c}: The reliability has significance effect towards the customer loyalty

H_{0d}: The responsiveness has no significance effect towards the customer loyalty

H_{1d}: The responsiveness has significance effect towards the customer loyalty

H_{0e}: The assurance has no significance effect towards the customer loyalty

H_{1e}: The assurance has significance effect towards the customer loyalty

H_{0f}: The empathy has no significance effect towards the customer loyalty

H_{1f}: The empathy has significance effect towards the customer loyalty

III. METHODOLOGY

We gather 600 college students in Bandung who represent the customer for the four main GSM providers. But, they also represent five pre-paid product since Telkomsel has two products. We use the Bernoulli method of sampling choosing because we do not know how many student pre-paid customers in Bandung. So we have 120 respondents for each product. The nonprobability sampling was used in this research based on on the limitation in time, place, and condition [23]. We also consider the willingness of the respondent to give their answer.

The purpose of this research is to measure the effect several independent variables towards one dependent variable, then we use the multiple linear regression. This research used causal method to explain the phenomenon. There are five independent variables and one dependent variable. We used four point scale (Likert) where (4) means strongly agree and (1) means strongly disagree for all items in the instrument. We apply the 24 statements to measure the quality of service and 12 statements for loyalty.

The validity and the reliability of the items were checked. The t calculate is bigger than the t table this means the items in the questionnaire met the validity test. The reliability test showed all of the items above the 0.70 which is the standards for the reliability [24]. As required we conduct the normality test which shows the significance result of 0.132. Since the result is greater than 0.05, then we conclude the data has normal distribution.

IV. RESULT AND DISCUSSION

Fig. 1 shows the level of the service quality dimension of the providers. The result indicates that each dimension is in good level. The college students perceive the service from the providers is already good. The highest percentage is on the tangible aspect. This means providers already succeed in presenting their brand/product. They have created good offices, good layout, good design, and good appearance of the employees.



Fig. 1 The Service Quality Level Of Providers

Fig. 2 shows the average from the five dimensions in a continuum line. We can see that the average level of the service quality is high and even very close to very high criteria. If the customer perceive this way, then the organization should be happy. The next step is to develop program which can enhance or even increase the service offered. For instance, now the 4G is becoming a standard, then the organization should prepare or even better apply the technology. If they delay the decision when the demand is high, they can lose their customer. Another example is the availability of the hotspot offered. It is common nowadays that provider also enclose the wi-fi hotspot offer in the data bundling. This once a competitive advantage, now it is a general practice. In short, the organization need to evolve and create new service to keep their customer happy.

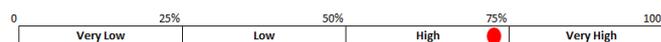


Fig. 2 The Continuum Line Of Service Quality

From the figure above, we can identify the lowest service quality is on the reliability. Yes this is very important and should address immediately. If the customer can rely on you, can you expect them to satisfy or happy? Reliability is always a major issue in cellular industry especially in Indonesia. The slogan wherever and whenever needed usually is just words without meaning. The organization already develops strategy to keep their service reliable. And they should do it constantly.

From the literature review we acknowledge that low service quality brings negative impact to the customer loyalty. When the organization cannot provide the great services, the customer loyalty will decrease. The uniqueness of the cellular industry is that certain customer easily changes to others. Fig. 3 shoe the loyalty level of student customers.



Fig. 3 The Customer Loyalty

The college student loyalty indicates on the high level. And as you can see the lowest dimension is on the resistant to others. This is in line with the notion that cellular customer easily change the providers. The people around them can be significant factors which influence them to change. The others cause is usually price (lower price, bonuses). Once the customer decides what organization they feel suit their need they tend to use it frequently. But keep in mind that this is only in short terms. If the providers cannot keep up with their need, then they will go to pursue the highest or the most interesting offer from other providers.

Fig. 4 show the average of the four dimensions used in measuring the loyalty. The percentage of 66.78% is considered on high level. Loyalty is needed by the organization to survive the business. There is still plenty of room for the providers to increase the loyalty. The efforts will be rewarding with the attached customers whose stay longer and spend more. The providers should seek what drive the customer to stay with their choice of provider. And then try to focus on that demand so they will create dying hard fans.

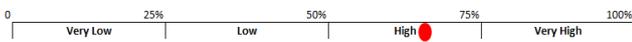


Fig. 4 The Continuum Line Of Loyalty

This research used multiple linear regressions to measure to influence of five dimensions in service quality on the customer loyalty. As requested, we perform normality test of the data. Using a SPSS we found the Asymp. Sig. (2-tailed) was obtained of 0.132 which is bigger than 0.05. It means the data are normally distributed. The study also conducted the heteroscedasticity test using Spearman's Rho correlation. And the result show the significance of the five independent variables is above 0.05. It can be said that there are no heteroscedasticity problems. The result from multi collinearity test as shown on Fig. 5 reveal that there are no multi collinearity problems in this model. All variables have tolerance score higher than 0.10 and lower than 10 for VIF.

Collinearity Statistics	
Tolerance	VIF
.632	1,581
.545	1,836
.473	2,112
.451	2,216
.516	1,936

Fig. 5 Multi Collinearity test Result

The next step is to measure the relation between each independent variable to the dependent. The SPSS program was use to get the result which shown on Fig. 6. We found the two of five variables are not significance (Sig. > 0.05). The responsiveness and assurance is in fact does not have significance effect on loyalty. Their Beta also confirms this notion. Each has only very small Beta, 0.031 and 0.022. The other three; tangible, reliable, and the empathy have significance effect on loyalty.

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	1,877	1,911		,982	,326
	Tangible	,632	,116	,230	5,453	,000
	Reliable	,559	,111	,228	5,014	,000
	Responsive	,104	,162	,031	,641	,522
	Assurance	,084	,191	,022	,437	,662
	Empathy	,566	,136	,194	4,158	,000

Fig. 6 The Coefficients

The result can be explain that if company wants to choose what factors which are relevant to use in increasing the loyalty, they should focus on how to present more tangible evidence related with their service. Or they can increase the reliability of the service, and they should show a respect and consideration toward the customer voices. While not all the independent variables have significant effect, the overall service quality has significance effect on the loyalty (Sig < 0.05). Fig. 7 show the result.

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	6931,080	5	1386,216	59,123	,000 ^a
	Residual	13927,213	594	23,446		
	Total	20858,293	599			

Fig. 7 Anova

The result indicates that the service quality has linear relation with loyalty, and significantly influences the loyalty. The probability Sig. is 0.000, which is below the 0.05. Fig. 8 will show us the relation between these variables. As we can see, the R score is 0.576 which means the service quality has strong relation with loyalty, closer to 1. The strength of the relation is shown by R Square, 0.332 or 33.2%. The customer loyalty affected by the providers' service quality in the amount of 33.2%. The other 67.8% affected by other factors. Even though still below the 50%, we can say that this level of influence is somewhat high because it consist of more than 30%. So if the organization could perform better service they can increase the loyalty for more than 30% which is quite good.

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	,576 ^a	,332	,327	4,84216

Fig. 8 The Summary

The discussions then lead to our hypotheses. The simultaneous hypothesis was based on the F test which determines whether the H_{0a} is accepted or rejected. The rule to accept the H₀ is when the Sig. > 0.05. Refer to Fig. 7, the Sig. is < 0.05 so we rejected the H_{0a}. The tangible, reliability, responsiveness, assurance, and empathy simultaneously have significant effect towards the customer loyalty. The findings can help the cellular providers to understand that overall service quality is highly important

for them and for the customers. They need to create impressive strategy which meet the customer need.

As for each dimensions, we also compare the Sig. level on Fig. 6. We found that the Sig. for Responsiveness and Assurance are > 0.05 . the result give more detail information which dimensions in service quality is more important for customers. So if the providers would like to develop a partial strategy, they should focus on these three dimension. This is notion is confirmed by the interview with several customers. They need their provider to understand them. New technology application, wider and better coverage, reliable network connection, office appearance, better customer relation strategy, and better communication are some of the factors they should focus to enhance. The detail answer to each dimension then;

- a. Reject the H_{0b} , H_{0c} , and H_{0f} . The tangible, reliability, and empathy have significant effect towards the customer loyalty.
- b. Accept the H_{0d} and H_{0e} . The responsiveness and assurance have no significant effect towards the customer loyalty

It should be noted that the research used college student as the respondents. This mean the result can only be applied when dealing the same customer criteria. For other criteria, then the organization should conduct further research using more general customers. But, this result can provide a briefs information about what can they do when

V. CONCLUSIONS

College student perceived the provider's service quality at 74.32%, which qualify as in high category. Cellular provider should feel good about it. Especially when combined with the customer loyalty at 66.78%, also qualify as high category. It can be concluded that customer are happy with their provider's services and they are quite loyal to them. Nevertheless the provider should aware that their customer are constantly monitoring the service and always compare with other providers. There are only 7.3% customers who do not use other provider. This means they prefer their current provider but still need backup from others. Indonesian cellular customers usually have more than one provider, so does the college student. It is quite tricky to maintain these customers. It is up to the provider to catch up the need and want.

The relation between service quality and loyalty is strong, 0.576 and the effect is 33.2% which is quite big. This mean the provider can increase the loyalty using the correct approach of service quality. The service quality can contribute one third of the total loyalty. Meanwhile, they also must use other approach if they want to grab higher level of loyalty.

Looking at the detail regarding what dimensions which affect the loyalty we concluded that the providers should focus on building their tangible factors, reliability, and empathy. Tangible factors can be in the form of their office, the design of marketing tools or promotion, their unique existence (the mobile BTS, the mobile sales, the store, the uniform wear by the employees, and also their image in the society). This might be related with the social pattern in Indonesia where the looks is almost as important as the quality. The image is important.

The reliability of the service of course plays an important role as well. The cellular communications need

not good and reliable connection. The customer easily disappointed with only one tiny problem. No matter how reliable for the whole week, if they cannot use the service now, they will dissatisfy. To overcome this matter, the providers need to build stronger and wider network. Wider network mean they have to put more BTS and the stronger mean they have to increase the bandwidth. It is not an easy task and yet money consuming, but what can they do if this is what the customer want? One solution which can be an alternative is they form an alliance with the competitor (co-opetition). They compete against each other yet they can join forces in some areas. They era of competition should be upgraded in order to manage the cost.

Like many other organization, they need to listen to their customers. Customers need the provider to hear their dissatisfaction, complaints, and advice. In the era of social media, organization can used Facebooks, Twitters, their own website, and others to know what the customer talk about. Not just listen but also act accordingly to the voice. When somebody really listens to you, it creates a wonderful feeling. That also applied for the customer. Provider can setup an automatic system to reply then follow up the question with the personal touch (calling, email, private message and so on).

One thing for sure is that loyalty is important. Building loyalty cannot be done in one day. It is a long and continuous process, and usually takes enormous amount of funds. Organization should understand this if they want to survive the competition. The era of product oriented is over, welcome to the service, and more personal service is come. Embrace this with full attention and understanding then your organization will have chance to survive. It is easy to serve the customer but it is very difficult to please them.

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