

Comparative Study of Store Image, Patronage Intention, and Retail Mix Elements between Alfamart and Indomaret in Jakarta

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ABSTRACT

The purpose of the research was to compare patronage intention and store image between Alfamart and Indomaret. Additionally, this research clarified the influence of the components in the retail mix, which were in-store promotion, store atmosphere, convenience, and merchandise between Alfamart and Indomaret in the formation of store image and its impact on patronage intention. The research methods were independent t-test and path analysis. Independent t-test aimed to find differences that occurred between Alfamart and Indomaret especially the differences in the components of the retail mix, store image, and patronage intention. Meanwhile, path analysis was to determine the effect of the retail mix to store image and patronage intention. After processing the data, it is shown that both variables which are the components of the retail mix, store image, and patronage intention are surpassed by Alfamart. In Alfamart, there are significant influences of in-store promotion, convenience, and merchandise to the store image and patronage intention. Meanwhile, for Indomaret, there is the influence of the in-store promotion, convenience, and merchandise to store image and patronage intention with conditions that store atmosphere and store image have a direct influence on the patronage intention.

Keywords: store image, patronage intention, retail mix, convenience store

INTRODUCTION

In the era of globalization, particularly in Indonesia, the development of business in the industry has been growing from time to time. Currently, an industry that is growing compared to other creative industries is the retail industry. This is similar to what has been quoted by Roy Mandey as the Head of Data and Market Information of Indonesian Retailers Association (Julianto, 2016), "I am optimistic retail industry in Indonesia will continue to grow because every year the growth of retail industry always exceeds economic growth. If Indonesia economic growth in this year is 5,8%, the growth of retail industry can be doubled or in the range of 12%". It is because retail is the best media where producer can market their

products to end-users. Global Retail Development Index (Oxford, 2015) stated that one of the retail industries which were considered very popular and answered the needs of consumer's needs were modern retail with convenience store format with growth of 17,4 per year.

In Indonesia, there are two major convenience store businesses, namely Alfamart and Indomaret. Alfamart and Indomaret are partners which develop and compete in the Indonesian market. The position of Alfamart and Indomaret issued by Top Brand Index in 2015 in the second period is shown in Table 1. Top Brand Index has some appraisal indicators such as top mind share, top market share and top commitment share.

Table 1 Top Brand Index of Convenience Store

Brand	Top Brand Index
Alfamart	52,9%
Indomaret	40,6%
Others	6,5%

(Source: Top Brand Index, 2015)

Top Brand Index assesses Alfamart as the market leader, where as Indomaret is the challenger in competition of convenience stores in Indonesia. However, Alfamart has to continue to increase the loyalty of their customers through customers' patronage intention. This is done to protect their market against their competitors, namely Indomaret. Moreover, Alfamart as the market leader only has had 8.557 outlets since 2014, while Indomaret has 9.096 outlets. Alfons (2015) said that the key to success in retail business was the acquisition of new customers and keep existing customers. In other words, customer retention is a major concern for Alfamart today. Dongjin and Shenghui (2008) stated that the consumer repurchase intention was an important indicator to predict repurchase behavior. In the retail business, it is known as patronage intention. According to Wakefield and Barnes (1996), patronage intention is also known as revisit intention or continuance intention which is the result or outcome of the most important variables in the retail operation. It is because of the similarity with the customer retention. Anic (2010) defined patronage behavior as the purchase behavior of the consumer in one particular store.

In improving the patronage intention, one of the critical factors that should be focused to is the store image as described by Kumar, Garg, and Rahman (2010). There are close relationship and mutual influence between the store image with patronage intention. In this case, store image of a convenience store can greatly influence the behavior of the consumers to choose a store which they visit. This is also confirmed by the pre-test survey conducted in this research for 50 respondents with the question whether the brand of Alfamart or Indomaret affects the customers in choosing convenience store that they visit. The obtained results are 40% of 50 respondents who agree that store image influences consumers in choosing convenience store that they visit, which is between Alfamart and Indomaret.

Competition in the retail business, especially in the achievement of patronage intention through the store image cannot be separated from the elements contained in the retail mix. Madaan (2009) argued that the performance of the retailer depended on the planning and implementation of the retail mix. It is the precise reason that elements of the retail mix or strategy are taken as the essential characteristics of the retailer. Furthermore, Levy, Witz, and Grewal (2014) explained that elements in retail could not be separated

and consisted of promotion, location, product, price, atmosphere and service. Through the pre-test survey in this research for 50 respondents with the question what factors prompted the customers to visit convenience store. The respondents' answers refer to all elements of retail mix except the service.

Some of the results of previous researches confirm the existence of elements of the retail mix contribution of the store image and patronage intention. The convenience of location has an advantage in attracting consumers to shop. The distance which is not affordable and far has an impact in reducing the frequency of customer to visit a retail store (Chaiyasoonthorn & Suksa-ngiam, 2011). Merchandise value such as product assortment, product pricing, and product quality affects patronage intention (Baker, Parasuraman, Grewal, & Voss, 2002). According to Yoo and Chang (2005), components that affect the formation of store image are promotion, convenience, merchandise, and atmosphere. Meanwhile, Kumar *et al.* (2010) stated retail atmospherics or environmental dispositions in and around a retail store could evoke perceptions about patronage intention. When consumers want to shop, they are often influenced by several factors in choosing a place which are price and discount (promotion), and conveniences provided (Nazir *et al.*, 2012). In short, the retail mix refers to various retailing activities combined to attract customers and ensure profits. When it is properly blended, all of the activities in store revolve around building a consistent store image to attract customers and meet objectives store (Nel *et al.*, 2005).

The researchers are interested in conducting comparative study on Alfamart and Indomaret to find out how these two major players in the convenience store industry in Jakarta are different in the store image, patronage intention, and their elements of retail mix. By doing so, an overview will be obtained about why Alfamart has not been more superior than Indomaret regarding the number of stores and customers' patronage intention.

The purpose of this research is divided into several points. First, it is to determine the differences in patronage intention and store image among the retail store of Alfamart and Indomaret (O1). Second, it is to confirm that there is a difference between the two and to determine the effect of in-store promotion, store atmosphere, convenience, and merchandise against patronage intention through the store image individually or simultaneously (O2). Third, it is to reinforce the existing comparison and describe the differences in consumers' perceptions about in-store promotion, store atmosphere, convenience, and merchandise in Alfamart and Indomaret (O3). In the end, the results are expected to provide benefits academically and practically with real output in the form of recommendations of the retail mix planning for Alfamart as the company maintains its position of market leader in facing Indomaret.

METHODS

There are two types of research used. Those are descriptive-comparative (O1 and O3) and descriptive-associative (O2). Data collection technique is done by distributing questionnaires using Likert scale to 100 Alfamart customers, and 100 Indomaret customers in Jakarta. The sampling technique is simple random sampling, and the sample size is calculated by using Slovin formula. The analytical methods are independent sample t-test for O1 and O3 to test the different variables used between Alfamart and Indomaret. Moreover, path analysis for O2 is to answer whether retail mix elements influence patronage intention through store image as the mediating variable.

RESULTS AND DISCUSSIONS

The results of descriptive-comparative research using independent t-test in O1 shows that there is difference in variables of patronage intention and store image in Alfamart and Indomaret. Table 2 summarizes the results of Independent t-test for patronage intention and store image for Alfamart and Indomaret. It uses SPSS 16.0 as the data processing tools.

Table 2 Comparison of Variables of Patronage Intention and Store Image in Alfamart and Indomaret

Variables	Difference	Alfamart	Indomaret
Patronage Intention	Yes (sig = 0,043)	3,1673	3,0103
Store Image	Yes (sig = 0,002)	3,7926	3,5652

From the Table 2, it is known that there the value of both patronage intention and store image of Alfamart and Indomaret has different score, where Alfamart overcomes Indomaret in those two variables. This justifies the first goal which there is a difference in patronage intention and store image between Alfamart and Indomaret. It is also in line with the pre-test survey. In the process of deciding which convenience store customers visit, they are heavily influenced by the store image. Store image which varies among convenience stores greatly affects and creates different patronage intention to consumers. This happens because each customer has a different perception and view of the store image for Alfamart and Indomaret. Perceptions and views indirectly force consumers to be attracted to a particular convenience store in comparison to other stores.

Next, the associative research is conducted using path analysis method. It is to determine the effect of the elements of the retail mix, which are in-store promotion, store atmosphere, convenience and merchandise to the store image and patronage intention in Alfamart and Indomaret. From the data processing, the result obtained is shown in Figure 1 and Table 3.

Path Analysis Test for Alfamart

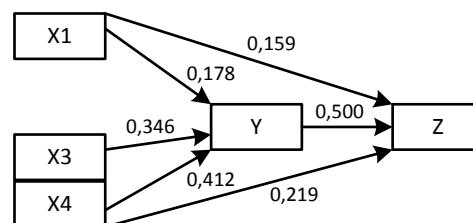


Figure 1 Empirical Causal Relationship of X1, X2, X3, X4, and Y on Z Variables in Alfamart

Table 3 Summary of Empirical Causal Relationship of X1, X2, X3, X4, and Y on Z Variables in Alfamart

Variable	Path Coefficient	Causal Relationship		
		Direct	Indirect Through Y	Total
X1 to Y	0,178	0,178	-	0,178
X1 to Z	0,159	-	0,098	0,098
X2 to Y	-	-	-	-
X2 to Z	-	-	-	-
X3 to Y	0,346	0,346	-	0,346
X3 to Z	-	-	0,173	0,173
X4 to Y	0,412	0,412	-	0,412
X4 to Z	0,219	-	0,206	0,206
Y to Z	0,500	0,500	-	0,500
ϵ_1	0,610	0,610	-	0,610
ϵ_2	0,650	0,650	-	0,650

Based on the test of path analysis for the Alfamart, it is found that there are influences of in-store promotion, convenience, and merchandise to the store image and patronage intention. In-store promotion, merchandise, and store image have a direct influence on patronage intention. However, convenience has indirect influence through the store image on patronage intention.

After the path analysis test, it shows that there are influences of in-store promotion, convenience, and merchandise on the store image and patronage intention in Indomaret. Meanwhile, the store image only has an influence on patronage intention. Only the store atmosphere and store image have a direct influence on patronage intention. The others variables like in-store promotion, convenience, and merchandise have indirect effect, which is through store image. The result can be seen in Table 4 and Figure 2.

After Path Analysis test, for both Alfamart and Indomaret, there is the comparison result of the Path Analysis of both convenience stores. It is shown in Table 5.

According to Path Analysis for Alfamart and Indomaret in Table 5, it can be concluded that there are similarities between the effect of in-store promotion, convenience, merchandising, and store image on

patronage intention. As it is explored deeper, the mutual influence is also based on the similar behavior of in-store promotion, convenience, and merchandise in Alfamart and Indomaret.

Path Analysis Test for Indomaret

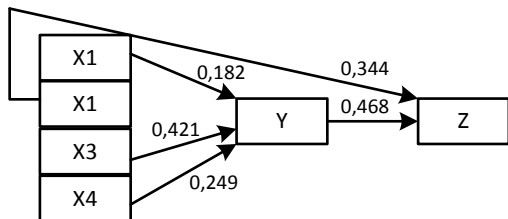


Figure 2 Empirical Causal Relationship of X1, X2, X3, X4, and Y on Z Variables in Indomaret

Table 4 Summary of Empirical Causal Relationship of X1, X2, X3, X4, and Y on Z Variables in Indomaret

Variable	Path Coefficient	Causal Relationship		
		Direct	Indirect Through Y	Total
X1 to Y	0,182	0,182	-	0,182
X1 to Z	-	-	0,085	0,085
X2 to Y	-	-	-	-
X2 to Z	0,344	0,344	-	0,344
X3 to Y	0,421	0,421	-	0,421
X3 to Z	-	-	0,197	0,197
X4 to Y	0,249	0,249	-	0,249
X4 to Z	-	-	0,117	0,117
Y to Z	0,468	0,468	-	0,468
ϵ_1	0,706	0,706	-	0,706
ϵ_2	0,711	0,711	-	0,711

Table 5 Comparison of Path Analysis test results in Alfamart and Indomaret

Variables	Influence		Result Comparison
	Alfamart	Indomaret	
X1 to Y	Direct Impact	Direct Impact	Equal
X1 to Z	Direct Impact	Indirect Impact	Equal
X2 to Y	No Impact	No Impact	Equal
X2 to Z	No Impact	Direct Impact	Different
X3 to Y	Direct Impact	Direct Impact	Equal
X3 to Z	Indirect Impact	Indirect Impact	Equal
X4 to Y	Direct Impact	Direct Impact	Equal
X4 to Z	Direct Impact	Indirect Impact	Equal
Y to Z	Direct Impact	Direct Impact	Equal

For in-store promotion especially promotion and advertising, Alfamart and Indomaret have common similarity. Promotion by Alfamart and Indomaret is sorted by the period such as daily, weekly, and monthly. Alfamart and Indomaret also publish its promotional activity through the same advertising media, namely

mailer. In the market, there is a statement which says, "Where there is Alfamart, there is Indomaret as well." This shows that both Alfamart and Indomaret continue to compete in providing convenience to consumers, especially in easiness to visit the stores in many places. Moreover, for the merchandise, the manufacturing company as the owner of the products marketed by retailers must ensure that the product assortment and product quality of each product distributed have the same standards in each convenience store. For product price, it is adjusted by each retailer in the marketing process. However, it is still within the margins set by the manufacturing company.

The in-store promotion, convenience, and merchandise conducted by Alfamart and Indomaret are aligned with the results of Nazir *et al.* (2012). They stated that when consumers made a purchase to buy something, they were affected by assorted factors in patronages such as price, assortment, security, convenience, after sales services, and promotion deals. In addition, Yoo and Chang (2005) also agreed that the component in the store image was based on merchandise, promotion, convenience, atmosphere, and others.

Unlike the other variables, store atmosphere, according to Alfons (2015), the quality of the store atmosphere of Alfamart is not better than Indomaret. Store atmosphere includes the layout settlement, lighting, area, aroma, and cleanliness of the retail store. Thus, it can be concluded that the results of Path Analysis regarding store atmosphere in Alfamart have no influence on store image and patronage intention. It is due to every consumers shopping in Alfamart are not sensitive to the condition of store atmosphere. However, Alfamart management still considers store atmosphere as essential factor to be improved. An improvement done is renovating outlets which are evaluated as old and dirty. This improvement is in line with Kumar *et al.* (2010). They agreed that perception of atmospheric cues could craft retail store image, enhance customer value, increase performance of patronage intention.

After obtaining the results from O1 and O2, the researchers proceed to descriptive-comparative research by using independent sample t-test to get results from O3. Based on the data processing, there are differences in consumer perceptions about the component of the retail mix such as in-store promotion, store atmosphere, convenience, and merchandise in Alfamart and Indomaret. Table summarizes the consumer perceptions of the component in the retail mix between Alfamart and Indomaret.

The results of the independent sample t-test are to see the differences in consumer perceptions on the retail mix in Alfamart and Indomaret. It shows that there is a difference of perceptions on all the variables of the retail mix in Alfamart and Indomaret, where merchandise has the most significant difference between Alfamart and Indomaret when it is compared with other variables, as shown in Table 6.

Table 6 Comparison of Retail Mix Elements in Alfamart and Indomaret

Variables	Difference	Alfamart	Indomaret
In-Store Promotion	Yes (sig = 0,060)	3,4870	3,3372
Store Atmosphere	Yes (sig = 0,011)	3,5810	3,3440
Convenience	Yes (sig = 0,067)	3,1343	3,0186
Merchandise	Yes (sig = 0,000)	4,0596	3,1830

The only problem of Alfamart when it is compared with Indomaret is the total outlets of Alfamart is not more than Indomaret. Alfamart had 8.557 outlets in 2014, while Indomaret had 9.096 outlets (Deil, 2014). Moreover, Alfamart has several advantages over its competitors including the top mind share, top market share, and top commitment share which are incorporated into a unity in measurement for Top Brand Index as shown in Table 1.

Through the observation, researchers find things that can be achieved by Alfamart in the future to become the market leader in the sector of a convenience store in Indonesia. Alfamart should do consumer retention and acquisition, increase customer loyalty, and have more stores than Indomaret. All three objectives are designed to achieve the ultimate achievement in the retail business, patronage intention.

Increasing consumer acquisition and retention is one of the keys to success in marketing strategies. Consumer acquisition looks for new markets which are profitable. Meanwhile, retention maintains relationships with the existing customers in creating Customer Lifetime Value (CLV). In the end, retention and acquisition have a goal to make consumers loyal.

Retention, acquisition, and loyalty in shaping the patronage intention are closely associated with store image in a convenience store. A good image greatly assists retailers in making retention, acquisition, and makes consumers loyal towards certain convenience store. This is also confirmed by the results of Path Analysis conducted. The results suggest that there is a strong and direct influence on store image and patronage intention. However, there are ways that can be used by retailers in forming the perception about store image such as maximizing the performance of each component of the retail mix.

With the importance of the elements contained in the retail mix in forming consumer perceptions of a store image, it leads to the patronage intention. The convenience store business must define strategies integrated the elements contained in the retail mix to get the best performance of a convenience store in marketing the product to consumers.

For in-store promotion, two related dimensions are discussed. The first is promotion and the second is advertising. Every activity of promotion of Alfamart is never apart from advertising which acts as a forum to communicate the promotion offered. Alfons (2015) stated that giving promotion to consumers was not a difficult thing. However, how to communicate the promotion to consumers was a challenge occurred.

For example, every 3-7 days, Alfamart gave different promotions to consumers. The problem was not how many promotions offered, but how to deliver it.

Based on the analysis performed, it can be said that the problem is very basic especially about in-store promotion of Alfamart. It is unorganized promotions which should be a trigger for consumers to return shopping. However, it turns into a confusion for the customers because there are many promotions offered. In addition, results show that 50% of the 100 respondents of Alfamart have shopped 1-2 times per week. It is not impossible that the

From the analysis conducted, the problem is very basic especially about in-store promotion of Alfamart. It is unorganized promotions which should be a trigger for consumers to return shopping. However, it turns into a confusion for the customers because there are many promotions offered. In addition, results show that 50% of the 100 respondents of Alfamart have shopped 1-2 times per week. It is not impossible that the consumers can observe and wait for each product to be purchased by the promotion.

Based on the real conditions and also the opinion of Shamout (2016), coupons and price reduction are the most extensive strategy to influence consumers' buying decisions. It can be given with recommendations packaged in a campaign like #WeekDaysCheapday! It is a form of arrangement or classification of the promotion given to products every day. Table 7 shows the detail of the campaign.

Table 7 Simulation of #WeekDaysCheapday!

Day	Product Category
Monday	Ready to Eat (RTE) product, instant food, snack
Tuesday	Ready to Drink (RTD) product, instant beverage
Wednesday	Home appliances
Thursday	Cooking appliances
Friday	Personal care

By organizing promoted products well, the consumers know exactly when the promotion of the product category is. Moreover, Alfamart is easy to conduct control and evaluation.

The current methods of delivering promotions between Alfamart and Indomaret are similar. Therefore, having a different campaign of #WeekDaysCheapday! is expected to be a promotion tool and becomes a different factor to improve and maximize the performance of in-store promotion in Alfamart compared with Indomaret.

Convenience consists of the convenience of shopping and convenience of location. There is no significant difference between the variable Convenience for Alfamart with its competitors, Indomaret. However, the number of Alfamart stores is not more than Indomaret. There are 8.557 stores for Alfamart and 9.096 for Indomaret.

Based on the dimensions of Convenience, the convenience of shopping and location and problems associated with the Alfamart, it is advisable for Alfamart to use a vending machine named AlfaBox. In addition to filling and maximizing the convenience, AlfaBox also provides the solution of the problems related to the amount of Alfamart stores. AlfaBox has the same concept like a vending machine. AlfaBox is to meet the shopping needs of consumers by providing the limited products effectively and efficiently.

The combined effects of dual income families and longer working hours have led to a time-scarcity epidemic, where time-saving shopping options are all important (Reimers, 2014). According to survey by Jakpat (2015), 5.066 respondents across Indonesia agree that three products that are the most often purchased by consumers are snack, Ready to Drink (RTD) product, and cigarette. It is not a coincidence that these three products are suited to the products that can be sold through the vending machine. AlfaBox is presented as an easy, fast, and practical solution to meet the urgent, important, and impulsive needs. Thus, the people in places that are not covered by the convenience store, can easily get the products they want like snack, Ready to Drink (RTD) product, and cigarette. In addition, AlfaBox has another advantage, such as the 24 hours service to save the cost of the employees and rent compared to the store.

Merchandise has dimensions of product quality and product pricing. Those have competitive difference between Alfamart and Indomaret. Starting from the initial production process of each product by the manufacturing company to distribution to retailers, each product has the same level of quality control including the same price standard. When the products come to the retailer, this is the stage where retailers have their way in packaging the sales process to the end-customer. According to research results, merchandise in Alfamart affects the store image and patronage intention. The retailers have to be skilled enough in moving consumers' perception about the product price marketed to consumers. Asuquo and Igbongidi (2015) said that the retailers' stocked goods are fulfilling customers' requirements.

Hence, #WeekDaysCheapday! campaign uses the tagline "if it is cheap, why should it be expensive?" to stimulate the perception and store image in alfamart to patronage intention. It also indirectly commits an offense against the positioning of the tagline in Indomaret which is "Cheap & Save".

In-store promotion (X1), store atmosphere (X3), and merchandise (X4) have similarities with the results of Path Analysis that has been done. The variables of X1, X3, and X4 affect Store Image and Patronage Intention directly. Although store atmosphere (X2) does not affect the store image and patronage intention in Alfamart, it is different from Indomaret. Store atmosphere in Indomaret has the influence to the patronage intention.

Store atmosphere refers to atmosphere and decoration. These dimensions are still outranked by

Alfamart. Store atmosphere has no influence on the patronage intention in Alfamart. Meanwhile, store atmosphere in Indomaret has a direct impact on the patronage intention. On the other hand, Hussain and Ali (2015) proved that the dimensions of store atmosphere like cleanliness, scent, lighting, display, and layout have a positive influence on the consumers' purchase intention. Table 8 shows the target consumers and objectives of the recommendation of store atmosphere in Alfamart and Indomaret.

Table 8 Target Consumers and Objectives of Recommendation of Store Atmosphere

No	Target Consumers	Consumer Conditions	Objectives of Recommendation
1.	Alfamart consumers	Store atmosphere has no influence on patronage intention.	Prevent acquisition Performing retention
2.	Indomaret consumers	Store atmosphere has an influence on patronage intention.	Performing acquisition

The first recommendation is based on the results of questionnaires obtained from Alfamart consumers. It is known that an assessment of the relaxing atmosphere indicator in Alfamart gets the lowest votes compared to other indicators. Thus, Alfamart must aggressively make improvements of relaxing atmosphere in the outlets. Relaxing atmosphere includes instruments like song, aroma, and temperature in the booth. With a good level of relaxing atmosphere, it not only keeps the acquisition from a competitor, but it also aims to perform retention to Alfamart consumers who consider store atmosphere.

The second recommendation is from the results of Path Analysis that there are influences of the store atmosphere and patronage intention. Alfamart should conduct consumer-related acquisition. For Indomaret consumers, luxurious atmosphere like lighting is factor that stimulates them to visit Indomaret. Therefore, it can be concluded that the reason why Indomaret consumers visit convenience store is lighting factors. Knowing Indomaret consumers have this tendency, Alfamart is expected to develop luxurious atmosphere in lighting by adjusting the bright lighting. It provides eye-catching effects and other effects such as cleaner and exclusive looks. This should be done by Alfamart to acquire Indomaret consumers.

CONCLUSIONS

There are differences in patronage intention and store image between Alfamart and Indomaret. Based on the results of data processing and analysis, it can be seen that the Patronage Intention and Store Image in Alfamart is more superior than Indomaret. In Alfamart, there is influence of in-store promotion, convenience, and merchandise on store image and

patronage intention. In-store promotion, merchandise, and store image have a direct influence on patronage intention, while convenience has indirect influence on patronage intention or through the store image. In Indomaret, there is influence of in-store promotion, convenience, and merchandise on store image and patronage intention. Store image only has an influence on patronage intention. However, only the atmosphere and store image have a direct influence on patronage intention. In addition, the in-store promotion, convenience, and merchandise have indirect effect, which is through store image.

Moreover, there are differences in consumers' perception towards the in-store promotion, store atmosphere, convenience, and merchandise in Alfamart and Indomaret. Based on the results, the differences are not significant. It can be seen that in-store promotion, store atmosphere, convenience, and merchandise in Alfamart are still more superior than Indomaret.

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