



The role of services in creating brand loyalty for B2B manufacturers

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ABSTRACT

This paper adds to a growing body of literature emphasizing the importance of branding to business-to-business (B2B) organizations. In particular, it addresses the paucity of research about branding in manufacturers that develop services alongside products (service infusion). The study assesses the relative importance of brand familiarity and three service categories (customer support, product support, and operational) in driving B2B brand loyalty. Following a qualitative scoping study, we collected data from 328 customers of manufacturers in two industries, photocopying/printing (high service intensity) and paper/packaging (low service intensity). Results reveal the pre-eminence of customer support services and brand familiarity in driving brand loyalty. Industry differences are based on customer support services and operational services. In high service intensity industries, customer support services dominate whereas operational services dominate in low service intensity industries. Our findings demonstrate that both services and brand familiarity drive brand loyalty in B2B settings.

1. Introduction

Traditionally product-dominant business-to-business (B2B) manufacturers create differentiation and competitive advantage by providing services alongside their product offerings (Schaarschmidt et al., 2018). In so doing, some manufacturers move further away from their core product identity, and the implications of this approach need to be considered (Neu & Brown, 2005). In this paper, we address the notion of “service infusion”; that is, when the relative importance of service offerings to a manufacturer increases compared to that of product offerings (Brax, 2005; Gomes et al., 2021). Despite the rapid increase in research addressing service infusion over recent years (Raddats et al., 2019), few studies have considered the importance of branding (Wirtz & Kowalkowski, 2023). This is surprising since a strong brand is one of the major determinants of success in a B2B context (Brown et al., 2011; Guenther & Guenther, 2019; Roper & Davies, 2010). We define a strong brand as one for which customers have a favorable perception of the total benefits or associations that it possesses, and thus, they continue to be customers of the supplier (Aaker, 2012; Bendixen et al., 2004).

In the context of service infusion, it is important to understand whether a product brand should be extended to services (Shankar et al., 2009). For example, a strong product brand might be weakened if service quality is inferior to product quality (Nenonen et al., 2014). Conversely, B2B services are more intangible than products, so a strong brand can act as a risk reduction heuristic for buyers (Brown et al., 2011). While studies about manufacturers’ service branding are scarce, IBM is a case in point. IBM has one of the world’s strongest B2B brands

(Interbrand, 2022), transformed over several decades from one where value has come from its products to one where value comes from its services (e.g., consulting) (Spohrer, 2017).

Manufacturers’ branding can be viewed in the wider context of B2B branding. Historically, B2B branding has been treated as less relevant than branding within a business-to-consumer (B2C) context (Kim et al., 1999; Roberts et al., 2014) despite calls in the practitioner community to not underestimate the power of the B2B brand (Jefferson, 2022). The development of brand management is thus at its early stages in B2B markets (Herbst & Merz, 2011; Keränen et al., 2012; Seyedghorban et al., 2016). Nevertheless, a strong B2B brand provides companies with a better chance to get on buyers’ shortlists (Mudambi, 2002; Wise & Zednickova, 2009), charge a price premium, and have customers recommend the brand to others (Bendixen et al., 2004). Studies of B2B buyers from different sectors suggest that while brands do influence organizational buyers’ decision-making, their influence is limited, and other factors such as logistics and service are more relevant (Grönroos & Helle, 2010; Leek & Christodoulides, 2011; Zablah et al., 2010).

This study seeks to address three main gaps in the literature. First, limited research addresses branding in the context of service infusion (Leek & Christodoulides, 2011; Seyedghorban et al., 2016). Moreover, considering the customer, rather than the manufacturer, perspective is quite rare in the service infusion research stream (Martin et al., 2019). In terms of branding and service infusion, only three papers exist. Cassia et al. (2017) consider how product and service brand images co-exist in the minds of B2B consumers, with the latter becoming more prominent through co-created service experiences. Jang et al. (2021) consider how

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<https://doi.org/10.1016/j.jbusres.2024.114506>

Received 1 August 2022; Received in revised form 13 November 2023; Accepted 8 January 2024

Available online 20 January 2024

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an effective servitization experience can promote customer attachment to a brand in a B2C context. Dimitriu and Warlop (2022) demonstrate that consumers respond favorably when product brands extend to services, enabling them to extend their service offerings. Second, while the benefits of a strong brand are apparent in B2B markets, scant research has considered the elements that create brand loyalty, such as services and brand familiarity (Persson, 2010). Indeed, prior research does not address the multidimensional nature of the B2B brand (Glynn, 2012). For example, the relative importance of different services in driving brand loyalty is unclear (Kittur & Chatterjee, 2021). Persson (2010), in an exploratory study, considers, among other factors, *distribution* (e.g., reliable deliveries), *service* (e.g., augmented service offerings), and *brand familiarity* as creating a strong B2B brand. However, Persson (2010) does not investigate the relative importance of different categories of services; that is, customer support services (e.g., product demonstrations), product support services (e.g., user training), and operational services (e.g., product operations) (Partanen et al., 2017) despite these offerings being distinct. Third, there is a need for further research that considers the relative importance of branding in different industries (Keränen et al., 2012) and service infusion in different manufacturing sectors (Vendrell-Herrero et al., 2022). Existing research has a relatively narrow focus; for example, Cassia et al. (2017) collected data from audiologists about hearing aids. Indeed, research into manufacturers' services is often concentrated on firms that derive a substantial share of their overall revenue from services (e.g., IBM); that is, a high service intensity (Patel et al., 2019). However, services are also important for manufacturers who derive a lower share of their revenue from services (Dachs et al., 2014; Lay et al., 2010); that is, a low service intensity. Thus, the importance of branding to manufacturers with high and low service intensity is worthy of investigation. To address these gaps, *this study aims to assess the relative importance of brand familiarity and different service categories in creating brand loyalty for B2B manufacturers.*

This study addresses a need for more research on customer perceptions of B2B branding (Glynn, 2012; Leek & Christodoulides, 2011). It finds that customer support services are the pre-eminent driver of brand loyalty, followed by brand familiarity. Thus, we demonstrate the importance of creating and promoting memorable brands for B2B manufacturers that include services. We collected data from two distinct sectors based on service intensity (high vs. low). Customer support services are most important for manufacturers with a high service intensity, while operational services are more important for manufacturers with a low service intensity. This latter result contradicts existing research that usually equates operational services to a high service intensity, but in this case, operational services are used to enhance the manufacturer's overall product solution and thus contribute to the corporate brand.

2. Theoretical background

2.1. Branding manufacturers' services

Despite considerable academic interest in branding, there is not one single explanation of what the brand construct is and where precisely the benefit comes from that drives brand value (Dall'Olmo Riley, 2016). As branding research developed, some questioned whether branding is of use to B2B customers (Saunders & Watt, 1979) and why B2B customers should purchase a brand over non-branded alternatives (Seyedghorban et al., 2016). Many B2B organizations became stuck at the "brand as reference" stage of the brand hierarchy (Goodyear, 1993); that is, the organization has visual imagery, such as logos, that are displayed on vehicles, website, etc., but there is no emotional resonance leading to a brand personality. It was questioned whether B2B brands need the same level of emotional resonance as B2C brands (Kuhn et al., 2008) since B2B buyers are assumed to be more rational and motivated by price (Fill & Fill, 2005). As the literature developed, Roper and Davies (2010) highlighted the importance of the affective components of brand

associations to business customers' levels of satisfaction. More recently, there has been a clear recognition that B2B markets have become more competitive and that the use of branding as a method of creating value and reducing buyer risk has increased (Beverland, 2018; Graham & Mudambi, 2016).

Customers seek a combination of product and service offerings, and this is how value is created (Bendixen et al., 2004; Martin et al., 2019). Thus, customers' perceptions of a manufacturer's brand image incorporate both product and service elements (Cassia et al., 2017). Mudambi et al. (1997) explain that B2B brand value is made up of the performance of a company's products, distribution, support services, and reputation, with the corporate brand becoming the differentiator for many B2B organizations (Roper & Fill, 2012). Brand familiarity and brand loyalty are two of the central pillars of brand equity, the added value generated for both customers and the firm (Aaker, 1996). *Brand familiarity*, according to Cambell and Keller (2003, p. 293), "captures consumers' brand knowledge structures; that is, the brand associations that exist within a consumer's memory." This can be based on direct or indirect involvement with the brand. Brand knowledge is a structure in memory (Keller, 1993), and as such, it is the beginning of the process through which consumers become familiar with a brand. Without knowledge, there can be no liking and no purchase and therefore, ultimately, no brand loyalty. Knowledge thus "impacts the attitudinal and behavioral brand response of customers" (Koll & von Wallpach, 2009, p. 338). Meanwhile, *brand loyalty* is "the biased behavioral response expressed over time by some decision-making unit with respect to one or more alternative brands out of a set of such brands" (Jacoby and Chestnut, 1978, p. 80). B2B organizations, therefore, need to develop marketing programs that create customer awareness and favorable attitudes toward the brand to ultimately create loyalty (Glynn, 2012).

2.2. Service intensity in manufacturers

Manufacturers are motivated to increase their service intensity through offering more services that address customer needs and create new revenue streams (Baines et al., 2009). Given that many products are increasingly homogenous, manufacturers are turning to services to provide differentiation in competitive markets (Fischer et al., 2012). However, service intensity is more pronounced for manufacturers of complex products compared with manufacturers of commodity products (Raddats et al., 2016). Manufacturers of complex products may offer services to help customers maintain and operate their products since the risk of product breakdown brings serious consequences (Raddats & Kowalkowski, 2014). For manufacturers of low-complexity products, maintenance and operational services are less important as customers can more easily deal with the consequences of product breakdowns themselves (Dachs et al., 2014).

Manufacturers are likely to enhance brand value if they have well-regarded brand reputations based on service competencies (Brown et al., 2011a; Mudambi et al., 1997). Equally, in the context of a manufacturer becoming a service-based platform provider, the brand position of the firm may need to shift to reflect its new market position (Beverungen et al., 2020). Indeed, this new brand position may need to be developed on a global basis, and the heterogenic nature of services, when delivered by local subsidiaries, means that this is a major challenge (Hakanen et al., 2017). Thus, in a B2B context, while brands are important for manufacturers, there is evidence that brand familiarity is less relevant than other drivers, such as the services provided (Grönroos & Helle, 2010; Zablah et al., 2010).

2.3. Hypotheses and theoretical framework

2.3.1. Drivers of brand loyalty

We are concerned with identifying the relative importance of services and brand familiarity in creating brand loyalty (Elsäßer & Wirtz, 2017; Zablah, 2010). Assessing brand loyalty helps us to determine

whether customers receive high value from their supplier compared to other suppliers and continue their patronage (Wang et al., 2018). Brand loyalty is driven in part by how familiar customers are with the brand; that is, their experience and knowledge of it (Biedenbach & Marell, 2010; Kent & Allen, 1994) and by the manufacturers' service offerings (Persson, 2010).

We wish to provide an assessment of the relative importance of different service categories in creating brand strength and so adapt a prior categorization of manufacturers' service offerings by Partanen et al. (2017) to present three categories. *Customer support services* encompass service offerings to enable the product sale, such as product delivery, fast lead times, ease of doing business, product demonstrations, and market updates. *Product support services* provide help to the customer to maintain the product condition and include warranty and user training. *Operational services* offer support with product use, including project management and outcome-based contracts. While other service categories have been presented in the literature (Raddats et al., 2019), these three categories are the major categories that manufacturers provide (Mathieu, 2001).

An established association exists in a B2C context between brand familiarity and buyers' perceptions of the brand (Aaker, 1996; Kent & Allen, 1994). In a B2B context, research also suggests that brand familiarity leads to improved brand loyalty (Davis et al., 2009; Gomes et al., 2016; Homburg et al., 2010; Kittur & Chatterjee, 2021). Moreover, promoting a single corporate brand is often more effective in building brand familiarity than promoting sub-brands (Kuhn et al., 2008; Roper, 2016; Tuli et al., 2007). Brand familiarity helps a company to get on a buyer's "long list" and is a risk reduction mechanism, meaning that the supplier with the most familiar brand is likely to benefit at the short-listing and decision-making stages (Hutton, 1997; Seyedghorban et al., 2016). Thus, brand familiarity among customers is associated with higher brand loyalty (Bennett et al., 2005, Persson, 2010). Therefore, the following hypothesis is proposed:

H1: A positive association exists between brand familiarity and brand loyalty.

Customer support services include many factors that B2B buyers have come to expect as standard, such as suppliers providing on-time, in-full product deliveries, being easy companies to deal with, and providing pre-sales activities such as product demonstrations (Persson, 2010). Customer support services are sometimes described as *service quality* and can be a driver of brand loyalty (Elsäßer & Wirtz, 2017; Kittur & Chatterjee, 2021). However, these services are recognized mainly as order qualifiers to get on a shortlist rather than factors that will win bids (Wouters, 2004). Nevertheless, getting these factors right is a key determinant of brand strength (McQuiston, 2004). In particular, product delivery performance is an important driver of B2B brand loyalty (Bendixen et al., 2004; Blombäck & Axelsson, 2007; Elsäßer & Wirtz, 2017; Mudambi et al., 1997). While customer support services do not generally lead to additional revenue streams for B2B suppliers, they can lead to loyalty towards brands, so we hypothesize the following:

H2: A positive association exists between the provision of customer support services and brand loyalty.

Product support services are those that are designed to enhance the performance and sale of a manufacturer's products (Partanen et al., 2017). They can be distinguished from customer support services in that they are likely to be chargeable offerings, such as technical support and training. Their importance for creating a strong brand comes through augmenting the product offering and helping to create market differentiation (Brown et al., 2007; McQuiston, 2004; Mudambi et al., 1997). Moreover, customers value the expertise and advice that B2B suppliers provide, strengthening brand loyalty (Persson, 2010). While product support services are heterogeneous and include extended product warranties, the overarching notion that the manufacturer supports its products is most important (Kuhn et al., 2008; Leek & Christodoulides, 2012). Thus, product support services offer customers access to manufacturers' expertise and knowledge, enhancing brand loyalty, so we

hypothesize the following:

H3: A positive association exists between the provision of product support services and brand loyalty.

Operational services are designed to help manufacturers manage the customer's operational activities related to the supplied products or the processes in which these products are used (Partanen et al., 2017). Operational services can also deliver performance guarantees that are managed through service level agreements (SLAs), which are valued by customers (Wirtz & Kowalkowski, 2023). These services are often conceived as being at the vanguard of what manufacturers can offer (Opazo-Basáez et al., 2022), and their importance to brand loyalty in a B2B context has been noted (Juga et al., 2018; Tuli et al., 2007). The long-term and value-added nature of such offerings also increases opportunities for cross-selling, which can improve brand loyalty (Keller & Kotler, 2022; Van der Borgh et al., 2023). In this regard, Jalkala and Keränen (2014) conceptualize *long-term service partners*, whose brand position is to take care of the operational aspects of the supplied products to create customer value and loyalty. Indeed, as the provision of operational services starts to dominate a manufacturer's customer offerings (e.g., IBM), their importance for brand loyalty increases (Shankar et al., 2009). Operational services help manufacturers to better understand customer needs and align with customers' internal processes, thus helping to create brand loyalty; hence, we hypothesize the following:

H4: A positive association exists between the provision of operational services and brand loyalty.

2.3.2. The moderating role of service intensity

Manufacturers have different levels of service intensity, and one of the main drivers of this is product complexity (Raddats et al., 2016). Complex products are usually high-cost items, involving intensive engineering and customization, and are often combined in systems and networks, such as IT and telecommunications equipment (Davies et al., 2011; Ren & Yeo, 2006). Buyers of complex products often seek collaborative relationships with suppliers to help manage this complexity, which manifests in greater service intensity, through service offerings (e.g., remote monitoring) (Momeni & Martinsuo, 2018). Services also play an important role for manufacturers of less complex products (Dachs et al., 2014) with low service intensity (e.g., installation and maintenance) (Lay et al., 2010). Thus, services are valuable for buyers of both complex and non-complex products, although the service intensity of the manufacturers will vary. We therefore use service intensity as a moderator to reassess the relationships in the theoretical framework.

The level of involvement that customers have concerning a product is an important determinant of their purchasing behavior (Peter et al., 1999). It can be assumed that low-complexity products in a B2B context are similar to low-involvement products in the B2C context; that is, products that are bought regularly, with little thought going into the decision-making process (Zaichkowsky, 1985). For low-involvement B2C products, heightened brand familiarity can lead to greater loyalty (Lim and Guzmán, 2022). Buyers are less motivated to investigate the features and benefits of low- compared to high-involvement products or to assess their relative merits against alternative offerings from competitors (East, 1997). The brand becomes the key differentiating factor, providing the customer's focal point where there may be few or no other unique selling propositions (Bennett et al., 2005). In a B2B context, we also equate low-complexity products with low service intensity. Persson (2010) identified the importance of brand familiarity in creating loyalty in the corrugated cardboard industry (a low-complexity product). Mudambi (2002) also found that manufacturers enhance brand familiarity for bearings by communicating the importance of the purchase decision rather than the features/benefits of the products. Thus, in a saturated marketplace for products in which customers have little interest, brands simplify decisions and reduce risks (Kapferer, 2012). In summary, with low service intensity, brand familiarity is a heuristic used by buyers to assess product and service quality and ultimately create brand loyalty. We therefore hypothesize the following:

H5a: Brand familiarity has a stronger impact on brand loyalty for low service intensity than high service intensity.

Customer support services are offerings that are generally considered to be part of the product sale and not charged separately (Persson, 2010). At one level, they are about getting the basics right, such as being a straightforward company to do business with (Parasuraman, 1998). At another level, the manufacturer may offer demonstrations of its products and how they align with market and technological trends, particularly relevant for complex products in fast-changing markets; for example, information and communication technology (ICT) (Partanen et al., 2017). These are high-service intensity products and the primary services required are those necessary to keep products operating efficiently (Lichtenthal & Long, 1998; Raddats et al., 2016). This is what Brown et al. (2011a) call *service competency* and is a driver of brand loyalty for such manufacturers. Through manufacturers delivering customer support services, customers procuring complex products will be able to better understand how the products fit within the market and technological landscape, and as such, this can alleviate some of the risks of buying them (Leek & Christodoulides, 2012). Thus, the focus of customer support services is helping customers buy the right products, reducing the uncertainty around which is the best option. So we hypothesize the following:

H5b: Customer support services have a stronger impact on brand loyalty for high service intensity than low service intensity.

Product support services provide manufacturers with the means to develop a new revenue stream from their services as well as create market differentiation (Frohlich & Dixon, 2001; Mathieu, 2001; Raddats & Easingwood, 2010). Baines and Lightfoot (2014) note that product support services are appropriate for customers who want manufacturers to undertake some (but not all) service activities for them. This flexible provision of expertise provides strong customer value (Fischer et al.,

2012), with manufacturers of less complex products limiting their service offerings to product support services (Raddats & Kowalkowski, 2014), hence low service provision. Oliva and Kallenberg (2003) note the difficulties for organizations that design, build, and deliver complex products to “get excited” about repairing them, and consequently, customers may not value suppliers that offer such services. It is not, therefore, surprising that manufacturers providing complex products have less motivation to offer product support services (Fischer et al., 2012). On the contrary, low-service intensity manufacturers with less complex products have stronger motivations to offer such services, and these are valued by customers (Mathieu, 2001). We thus hypothesize the following:

H5c: Product support services have a stronger impact on brand loyalty for low service intensity than high service intensity.

Much recent service infusion literature considers operational services and their applicability to helping customers operate complex products and systems as part of their internal processes (Partanen et al., 2019). Baines and Lightfoot (2014) consider *advanced services* where manufacturers take on some degree of operational control of complex products and guarantee their availability or uptime. Thus, these service offerings are outcome-based, which can enhance trust between the supplier and customer as the manufacturer’s offering aligns with customer needs (Korkeamäki & Kohtamäki, 2020; Mathieu, 2001). Operational services are particularly important for customers buying high-complexity products from high-service intensity manufacturers since they may lack the skills to support and operate the products and thus rely on their suppliers (Raddats & Kowalkowski, 2014). Moreover, customers are often under pressure to downsize and redefine their core competencies, with increasing product complexity leading to the rise of service outsourcing (Gebauer, 2008; Oliva & Kallenberg, 2003). Thus,

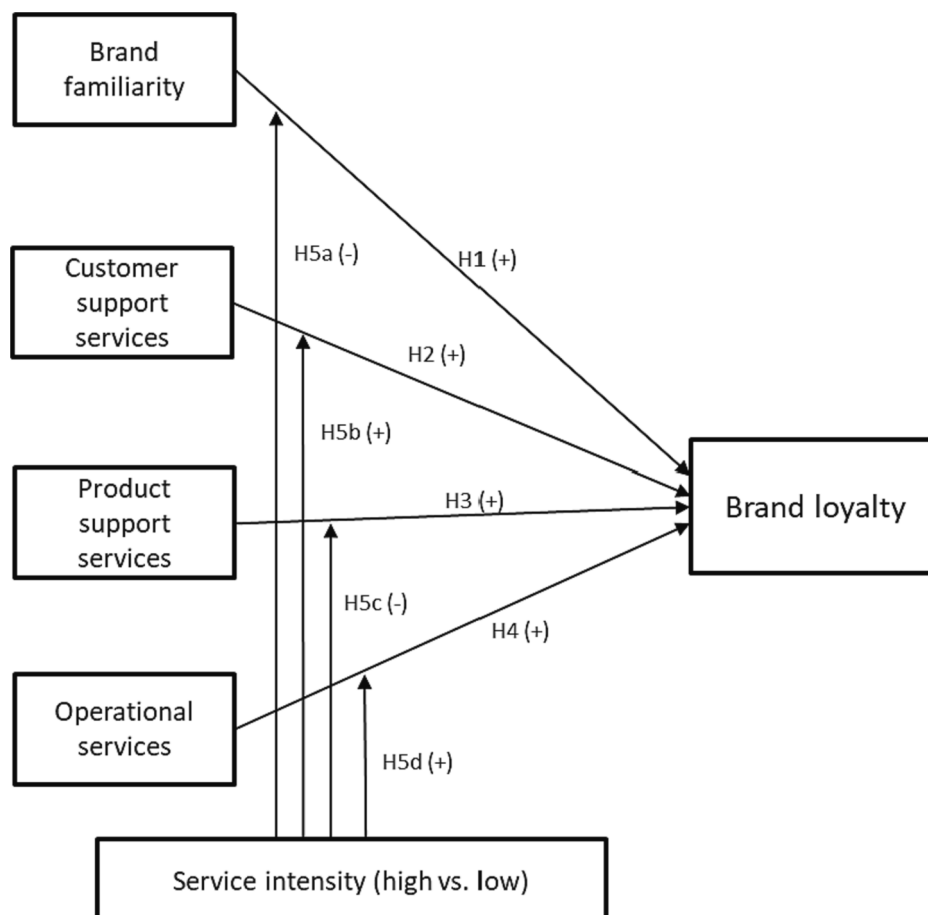


Fig. 1. Theoretical framework.

operational services help customers mitigate the risks of purchasing and operating complex products procured from high-service intensity manufacturers (Brax & Jonsson, 2009). We hypothesize the following:

H5d: Operational services have a stronger impact on brand loyalty for high service intensity than low service intensity.

The theoretical framework for the study is presented in Fig. 1.

3. Methodology

3.1. Empirical context

Our study aimed to address branding in different manufacturing sectors to consider high and low service intensity. First, we sought to identify levels of product complexity in different industries since service intensity is linked to product complexity (Raddats et al., 2016). We used the United Kingdom's (UK's) Standard Industrial Classifications (SIC) codes, considering the service intensity of several companies in each manufacturing SIC code group via their financial reports. There is clear evidence that photocopiers/printers are complex products. Companies in the photocopier/printer industry achieve at least 25 % of their turnover from services, hence a high service intensity. Firms in two other industries, paper/packaging and aggregates, have low service intensity (<10 % turnover from services).

Second, we undertook interviews to develop a better understanding of B2B branding (Roper & Davies, 2010). We conducted interviews with nine buyers from these industries (photocopiers/printers, paper/packaging, and aggregates), three interviews in each. The purpose was to ascertain the relative importance of brand familiarity and services in buyers' perceptions of strong B2B brands. The findings showed that services are important for all buyers; however, respondents in the aggregates industry questioned whether branding was an appropriate term in a commodity-based business. Our subsequent investigation thus focused on the paper/packaging and photocopier/printer industries. We discussed the proposed constructs in our theoretical framework with the buyers. The respondents agreed that the proposed service categories (customer support services, product support services, and operations services) were appropriate for their markets. However, the interviews suggested that we needed to extend the scope of customer support services to not only include product deliveries and be easy to do business with (Persson, 2010) but also include product demonstrations (Partanen et al., 2017).

3.2. Research instrument and measures

Our primary method of data collection was through conducting two surveys in separate industries using the same instrument. In developing the survey instrument, we took care in utilizing established measures and scales (Hulland et al., 2018). To this end, where possible, we adapted pre-established scales and, where these were not available, operationalized existing measures. In terms of the independent variables, we considered *brand familiarity* (3 items) as a driver of brand loyalty and used a scale from Kent and Allen (1994). To operationalize the different categories of services, we adapted the typology of industrial services of Partanen et al. (2017): *customer support services* (5 items), including different pre-sale activities; *product support services* (3 items), including training and warranty; and *operational services* (3 items), designed to help customers operate the supplied equipment. Our dependent variable was *brand loyalty* (3 items), adapted from Wang et al. (2018). The measures were assessed using a seven-point Likert-type scale, where "1" means "strongly disagree" and "7" means "strongly agree." All our latent variables were modeled with reflective indicators (Kent & Allen, 1994; Partanen et al., 2017; Wang et al., 2018).

The survey included questions filtering the respondents so that only managers (1) who had decision-making responsibility for purchasing products and services could participate and (2) were customers of the manufacturers about whom they were responding. For the photocopier/

printer study, particular attention was paid to ensuring that buyers were answering in their capacity as corporate decision-makers rather than individuals. In addition, the respondents were classified by such variables as company size, sector, spending on the products, and the share of spending with the focal manufacturer. The survey instrument was pilot-tested by two academic colleagues and four managers to ensure that the items were clear and their meanings understood (Saunders et al., 2016). No major problems were identified except for the ordering of some questions. This feedback was considered when developing the final survey instrument, which was designed to be administered online in the UK.

3.3. Data collection and sample characteristics

We implemented the survey in two sectors to provide a contrast based on manufacturers' service intensity comparing the elements creating brand loyalty for companies with different levels (low vs. high service intensity). For the paper/packaging industry (the first study), we ran the survey with customers of one firm. We identified a market leader in this sector with a strong brand according to the three buyers interviewed, a judgment supported by secondary data. The firm promotes its services alongside products, although services are not a major financial component of its turnover. Using a market research company as an intermediary, an agreement was reached with the firm's senior management to take part in the study. The survey was administered by the market research company using a database of the paper/packaging firm's customers, and 173 usable responses were received. These were mainly organizations in the manufacturing (28 %), finance, insurance, and real estate (26 %), and education (14 %) sectors.

For the photocopier/printer industry (the second study), given the ubiquity of these products, it was appropriate to collect data from a B2B survey panel, a commonly used approach in this field (e.g., Zablah et al., 2010). A market research company with experience in running consumer panels administered the survey. Given the wide range of firms that the respondents might consider to be strong brands within this sector, we gave them a choice of the five leading firms in the market. We asked them to complete the survey for the firm they considered to be a strong brand but crucially had experience of purchasing products and services from in a corporate, rather than personal, capacity. If they did not have any experience purchasing products and services from one of these brands, they terminated the survey (see Table A1 for a breakdown of these firms). All five firms provide a wide range of services that conform to the three categories used in this study (customer support, product support, operational). The second survey garnered 155 responses, mainly from organizations in education (18 %), other services (18 %), and the finance, insurance, and real estate (16 %) sectors. The overall sample therefore numbered 328 responses.

3.4. Preliminary data analysis

We provide descriptive statistics for both samples separately in Table A2. For the first study, 77 % of all the respondents were either the sole or main decision-makers for the purchases and 60 % for the second study, giving us confidence in the respondents' ability to answer the survey questions accurately. In line with previous cross-sectional studies of B2B branding (e.g., Zablah et al., 2010), the respondents' organizations were from a wide range of sectors and of various sizes. For both studies, around 50 % of the respondents spent over 50 % of their available budget with the chosen supplier, demonstrating strong brand loyalty. Table A3 presents item statistics, including their sources, together with means and standard deviations for both samples separately. To provide further details on the characteristics of the data, correlation matrices are also provided in Tables A4, A5 for each dataset.

Study 1 comprises data relating to one focal firm, whereas Study 2 comprises data relating to five focal firms; therefore, it is important to confirm that our data do not violate assumptions of homogeneity of

variance. To do this, we performed a one-way ANOVA on the dataset from Sample 2, using the five brands as categorical groups, testing them against our model constructs. We used a Bonferroni correction to adjust the alpha level for these statistical tests to control for the probability of committing a type 1 error. The analysis demonstrated no significant differences among any of the groups. Furthermore, using Levene’s test, which tests whether the variance in scores is the same for each of the five groups, we have not violated this assumption as all significance values (Sig.) were above 0.05 (Table A6).

Furthermore, the respondents from both studies were from companies of varying sizes. It is important to consider whether there is variance in the perceptions of service offerings dependent on the level of turnover given that smaller companies may procure more services than larger companies because they lack in-house resources. To do this, we performed a one-way ANOVA on both datasets, using the level of turnover (over £1 million and under £1 million) as categorical groups, and tested them against our model constructs, similar to the approach used by Zablah (2010). The results (including Levene’s test) demonstrate that there were no significant differences among any of the groups (see Tables A7, A8). Our data were therefore considered suitable for further analysis, which we present in Section 4.

To reduce method biases, our respondents were (1) made aware that the data were collected anonymously and (2) not made aware of the specific relationships being tested (Podsakoff et al., 2003). Before undertaking the main analysis, it is important to check common method bias in cross-sectional, behavioral-nature studies (Podsakoff et al., 2003; Cheffi et al., 2023); we did so by adopting Harman’s one-factor test (Koh et al., 2003). The co-variance explained by one factor is 32 %, indicating that common method bias was unlikely to be an issue.

4. Data analysis and results

We adopted a PLS-SEM technique for data analysis using SmartPLS version 3.3 (Ringle et al., 2015), conforming to established standards of best practice specified by Hair et al. (2017) and Henseler et al. (2016).

4.1. Measurement model

Our analysis comprised 17 measurement items, aggregating the whole dataset before testing for differences between two binary conditions using multi-group SEM. A detailed breakdown of our constructs’ properties, including their reliability and validity, is shown in Table 1.

The checks presented in Table 1 suggest that the measures tested in PLS-SEM are reliable and valid (Fornell & Larcker, 1981). The reliability of the scale items is evidenced by their high composite reliability, with Cronbach’s alpha coefficients (α) ranging from 0.75 to 0.89 and the average variances extracted (AVE) values ranging from 62 % to 82.5 %, within acceptable thresholds (Fornell & Larcker, 1981). Sixteen of the factor loadings are above 0.7, with only one factor loading falling slightly short of this threshold at 0.65 (Hair et al., 2019; Hulland, 1999). This indicates convergent validity and that the factors extract sufficient variance from each variable. Internal consistency within the model is therefore present.

The discriminant validity of the measures is evidenced by the AVE values for each of the constructs being greater than the squared factor

Table 1
Construct properties and checks.

	Mean	SD	AVE	SKEW	Alpha	CR	1	2	3	4	5
Brand familiarity	5.76	1.20	0.82	-1.46	0.894	0.93	0.906				
Brand loyalty	5.45	1.13	0.83	-0.773	0.894	0.93	0.572	0.911			
Customer support services	5.06	1.33	0.62	-0.679	0.847	0.89	0.566	0.747	0.787		
Operational services	4.68	1.78	0.78	-0.600	0.856	0.91	0.439	0.572	0.763	0.883	
Product support services	5.48	1.43	0.67	-1.13	0.754	0.86	0.498	0.590	0.764	0.819	0.819

Notes: SD = standard deviation. AVE = average variance extracted. SKEW = skewness. CR = composite reliability. Alpha = Cronbach’s α coefficient. The square root of the AVE value is shown in bold on the diagonal. Entries below the diagonal elements are the correlations between the construct’s values.

Table 2

Cross Loadings.

	Brand loyalty	Customer support service	Brand familiarity	Operational services	Product support services
bra1	0.920	0.688	0.524	0.554	0.560
bra2	0.880	0.627	0.517	0.383	0.471
bra3	0.924	0.742	0.520	0.600	0.569
cust1	0.655	0.826	0.439	0.492	0.557
cust2	0.595	0.836	0.422	0.554	0.517
cust3	0.753	0.855	0.556	0.523	0.548
cust4	0.459	0.746	0.409	0.642	0.642
cust5	0.439	0.657	0.426	0.736	0.678
famm1	0.551	0.528	0.930	0.414	0.472
famm2	0.470	0.495	0.906	0.358	0.431
famm3	0.526	0.539	0.882	0.417	0.446
ope1	0.432	0.604	0.322	0.864	0.718
ope2	0.515	0.653	0.421	0.881	0.756
ope3	0.550	0.639	0.408	0.896	0.695
prod1	0.460	0.592	0.392	0.721	0.807
prod2	0.426	0.584	0.378	0.784	0.833
prod3	0.544	0.599	0.441	0.536	0.813

Note: Factor loadings of items with their constructs are shown as bold and italic.

correlation values among constructs (Fornell & Larcker, 1981); all values are greater, as shown in Table 1. Occasionally, the Fornell–Larcker criterion does not perform well, particularly when the indicator loadings on a construct differ only slightly (e.g., for this study, all the indicator loadings are between 0.65 and 0.93) (Henseler et al., 2015). We clarified our dataset’s discriminant validity, first by examining the cross-loadings. This confirmed that the item values were highly correlated to the appropriate construct (Table 2).

Second, following Henseler et al. (2015), we checked the heterotrait-monotrait (HTMT) ratio. This is the mean value of the item correlations across constructs relative to the (geometric) mean of the average correlations for the items measuring the same construct (Hair et al., 2019). The value of HTMT should be less than 0.85 to 0.90 (Henseler et al., 2015). Table 3 shows that the values of HTMT are less than 0.85, which is satisfactory.

The variance inflation factor (VIF) was used to assess any collinearity issues in the indicators. A VIF value above 5 demonstrates critical collinearity issues among the indicators (Hair et al., 2016). For this study, VIF values ranged from 1.372 to 3.314, meaning our data is within acceptable thresholds. Based on these analyses, the measurement model was assessed as suitable for structural modeling.

4.2. Structural model and hypothesis testing

Our next step was to specify and estimate the measurement model using structural equation modeling with PLS-SEM. The structural model was evaluated using predictive power (R²), Stone-Geisser’s Q², and the significance of path coefficients. Our proposed hypotheses were assessed using a bootstrapping procedure (with 500 subsamples) (Chin, 1998; Hair et al., 2012). In this study, 59 % of the variation in brand loyalty occurs because of all the exogenous latent variables in the model. Blindfolding processes were applied for the assessment of predictive relevance (Fornell & Bookstein, 1982; Hair et al., 2011), with results

Table 3
Heterotrait-Monotrait Ratio of Correlation.

	Brand familiarity	Brand loyalty	Customer support services	Operational services	Product support services
Brand familiarity	0.845				
Brand loyalty	0.572	0.808			
Customer support services	0.566	0.747	0.791		
Operational services	0.439	0.572	0.769	0.841	
Product support services	0.498	0.590	0.764	0.819	0.817

Table 4
Direct Effects.

Hypotheses	Path	Beta	SD	T value	P value	2.50 %	97.50 %	Decision
H1	Brand familiarity -> Brand loyalty	0.198	0.056	3.525	0.000***	0.091	0.312	Supported
H2	Customer support services -> Brand loyalty	0.601	0.066	9.066	0.000***	0.467	0.720	Supported
H3	Product support services -> Brand loyalty	0.042	0.064	0.653	0.514	-0.083	0.170	Unsupported
H4	Operational Services -> Brand loyalty	0.016	0.066	0.241	0.809	-0.104	0.157	Unsupported

P < 0.05 *, P < 0.01 ** and P < 0.001***.

showing that all values are positive and greater than 0.

Our hypotheses were assessed using the combined dataset. The details concerning the structural path estimates and their significance are evidenced in Table 4. First, in accordance with H1, the hypothesized relationship shows that brand familiarity has a positive relationship with brand loyalty ($\beta = 0.198, p = 0.000$); therefore, this hypothesis is accepted. Second, for the hypothesized relationship in H2, customer support services have a positive and significant association with brand loyalty ($\beta = 0.601, p = 0.000$), so this hypothesis is also accepted. Third, the hypothesized relationship (H3) between product support services and brand loyalty is negative and non-significant ($\beta = 0.042, p = 0.514$); therefore this hypothesis is rejected. Finally, the hypothesized relationship (H4) between operational services and brand loyalty is negative and non-significant ($\beta = -0.016, p = 0.809$); therefore, this hypothesis is also rejected. Thus, brand familiarity and, in particular, customer support services are the drivers of brand loyalty.

Given substantive interest in group effects in this study, multi-group SEM was used. This approach was taken because of having binary levels of service intensity (high vs. low) to uncover differences in how B2B customers perceive brand familiarity over services in creating brand loyalty. An assessment was therefore performed to see whether there were significant differences between the path coefficients using the Welch-Satterthwaite test (Welch, 1947), a parametric significance test for the difference of group-specific results that assumes unequal variances across groups. The results show that both customer support services and operational services have a significant path difference with brand loyalty in both high- and low-complexity products, while brand familiarity and product support services have an insignificant path difference with brand loyalty in both high- and low-complexity products. These effects are reported in Table 5.

These results show that there is no statistical difference between high and low service intensity in terms of the importance of brand familiarity,

Table 5
Group differences.

Hypotheses	Path	Path coefficients (base model)	Path coefficients (high)	Path coefficients (low)	Path coefficients - diff	t-value	p-value
H5a	Brand familiarity -> Brand loyalty	0.198	0.241	0.090	0.151	1.791	0.075
H5b	Customer support services -> Brand loyalty	0.601	0.630	0.187	0.443	2.866	0.005
H5c	Product support services -> Brand loyalty	0.042	0.017	0.126	-0.109	0.755	0.451
H5d	Operational services -> Brand loyalty	0.016	-0.041	0.502	-0.543	4.419	0.000

so H5a is not supported. Customer support services are a significant driver of brand loyalty for high service intensity ($\beta = 0.630, p = 0.000$) compared to low service intensity ($\beta = 0.187, p = 0.083$), and this supports H5b. There is no statistical difference between high and low service intensity in terms of product support services, so H5c is not supported. Group differences are apparent when considering the relationship between operational services and brand loyalty between high ($\beta = -0.041, p = 0.001$) and low ($\beta = 0.502, p = 0.000$) service intensity. Operational services are more important in the low service intensity category in creating brand loyalty, so H5d is not supported.

5. Discussion

This study investigates B2B customers' perceptions of what drives brand loyalty. Data were collected from two sectors in comparison with prior work; for example, Wang et al. (2018) (one sector) providing the opportunity to compare brand loyalty based on different levels of service intensity.

5.1. Theoretical contributions

The study makes three main contributions. First, it is one of the first studies to address branding in a service infusion context. Existing research shows that services can enable customer attachment to a product brand (Jang et al., 2021) and that a product brand with service dimensions can extend its service offerings (Dimitriu & Warlop, 2022). Conversely, our study envisages a more focal role for services, whereby they are a driver of brand loyalty in their own right. The study also confirms the importance of brand familiarity as a driver of brand loyalty (Aaker, 1996; Kent & Allen, 1994). Moreover, while prior research often finds that the impact of branding on buyer behavior in B2B contexts is modest (Zablah et al., 2010), through the positive relationship between

brand familiarity and brand loyalty, we demonstrate the importance of creating and promoting memorable brands for B2B manufacturers.

Second, scant research has considered the relative importance of the elements that drive brand loyalty in a B2B context, such as services and brand familiarity (Glynn, 2012; Kittur & Chatterjee, 2021). Persson (2010), in an exploratory study, uses a small sample of buyers to consider a range of service and non-service drivers; however, his work does not attempt to assess the relative importance of these drivers. Our study makes this assessment and provides strong support for the importance of customer support services as a driver of brand loyalty, followed by brand familiarity. Customer support services include being an easy company to do business with, being able to provide the demonstrable benefits of one's products, and assisting the customer by providing insight into the wider market (Partanen et al., 2017; Persson, 2010). The importance of brand familiarity demonstrates that it is crucial for customers to be able to gain knowledge and experience of the brand first-hand through product use and service interactions. Thus, while extant research suggests that promoting a single corporate brand is often most effective in building brand familiarity (Roper, 2016), customers' knowledge and direct experience of a brand develop during service interactions (Cassia et al., 2017). Thus, a manufacturer's marketing communications activities about its brand need to align with this service experience to create a "single voice."

Third, this study answers calls for further research into B2B branding addressing different industries (Keränen et al., 2012). We use the notion of service intensity to distinguish two industries: paper/packaging (low service intensity) versus photocopying/printing (high service intensity). Our study demonstrates that there are two significant group differences. First, the results reveal that customer support services are the most important in creating brand loyalty for high-service intensity manufacturers, helping their customers to understand the suitability of their products and how they might fit in the wider market context (Parasuraman, 1998; Raddats et al., 2016). Second, the study indicates that operational services are the most important in creating brand loyalty for customers of low-service intensity manufacturers. Conversely, extant literature suggests that operational services will create greater brand loyalty for high service intensity manufacturers (Raddats & Kowalkowski, 2014). We interpret this result through the understanding that the manufacturer brand comes from both product and service drivers, and the latter needs to support the former, rather than a service being a replacement for a product. To explain this point, if all a customer is buying is an outcome, then what the product brand stands for becomes largely irrelevant. We do not see this situation in the copier/printer industry, and the product offering is a key part of a manufacturer's brand even if operational services are promoted as quasi-standalone offerings. Thus, in terms of H5d, we believe that customers interpret operational services in terms of the solutions that the paper/packaging manufacturer provides; for example, helping customers with managing quality control processes, stock levels, and product security. Thus, rather than a quasi-standalone "advanced" offering as set out in much of the literature (Baines & Lightfoot, 2014; Beverungen et al., 2020; Partanen et al., 2017), operational services are important additions to product offerings and help to create stronger brand loyalty.

5.2. Managerial implications

While considerable research addresses how B2B manufacturers should develop appropriate service offerings and customer relationships, less is known about how branding should be used in the context of manufacturers' services. This study suggests that B2B manufacturers should try to improve brand familiarity among customers and focus on certain service categories to develop brand loyalty. This entails not only promotional activities using traditional media (e.g., trade shows) and newer media (e.g., social media) but also approaches linked to service interactions to help customers experience the corporate brand and understand what it stands for.

The results from this study show that the clear driver of brand loyalty is

a range of customer support services linked to the core product business, hence being an easy company to deal with by having short and guaranteed delivery lead times. Equally, taking the time to demonstrate new product ideas and setting them in the context of market and technological developments. These elements are particularly important for manufacturers with complex products, where customers seek help from their suppliers to reduce this complexity and minimize risks. For manufacturers with low-complexity products, providing customers with product/service solutions that address their operational challenges is encouraged. These service offerings may not result in new revenue streams independent of those of product sales but can help to make the manufacturer a more valued supplier and therefore a stronger brand in the market.

5.3. Limitations and future research

We document limitations here together with ideas for future research. First, this study surveyed customers in two main industries that provide a contrast based on high versus low service intensity. While we believe that the study's results apply to other industries with similar characteristics, we do not claim that they are generalizable to all other industries. We, therefore, encourage researchers to use a similar survey instrument to assess the importance of service offerings and brand familiarity as drivers of brand loyalty in other manufacturing industries. Second, we used one focal manufacturer for the first study and multiple companies for the second. While it may have been optimal to use one manufacturer for the second study, this was not possible. To overcome this issue, we were careful to limit the respondents in the second study to five manufacturers, which had similar offerings conforming to our service categories. Moreover, statistical analysis of Sample 2 showed no major variations between brands, meaning that it was suitable to compare against Sample 1. In the future, it may be possible to find a single company to test the "high service intensity" condition.

Third, we did not use every service category that manufacturers offer and chose those that were most relevant for the companies/industries in our study. It is possible that choosing other service categories, for example, R&D services (Partanen et al., 2017), would have led to different results, and if studies are conducted in other industries, we suggest that researchers consider whether the service categories in our survey instrument are appropriate. Fourth, the study was cross-sectional, meaning that it provides a snapshot of the drivers of brand loyalty. Further longitudinal studies could study how brand loyalty changes in light of changing service offerings. Fifth, although this study was focused on brand familiarity and service categories in driving brand loyalty, other factors may also drive it, and further research could evaluate these dependencies. Indeed, deconstructing the drivers of brand loyalty is an underdeveloped research topic more generally, and this paper makes a start at addressing this agenda.

6. Conclusions

This study is one of the first to address branding in a service infusion context despite there having been a substantial number of papers about this and related topics, such as servitization, over the last decade. The study investigates B2B customer opinion about branding and service intensity aligned to three service categories (customer support, product support, operational). It was operationalized through access to samples from two distinct sectors, paper/packaging and copiers/printers, to test the moderating effect of service intensity. The study finds that brand familiarity and, in particular, customer support services are important drivers of brand loyalty. For high service intensity manufacturers, customer support services are a more important driver than for low service intensity manufacturers. In this case, the B2B brand is strongest when suppliers act as trusted advisors and guide their customers through market and technological changes. For low service intensity manufacturers, operational services are a more important driver of brand loyalty than for high service intensity manufacturers. In this

case, operational services are conceived as product/service solutions, and thus, B2B brand loyalty is strongest when product and service offerings are not disaggregated, as may happen if operational services are promoted and delivered as quasi-standalone offerings.

CRedit authorship contribution statement

Chris Raddats: Writing – original draft. **Stuart Roper:** Conceptualization, Methodology, Writing – review & editing. **Rachel Ashman:** Methodology, Formal analysis.

Declaration of competing interest

The authors declare that they have no known competing financial

interests or personal relationships that could have appeared to influence the work reported in this paper.

Data availability

The data that has been used is confidential.

Acknowledgments

The authors would like to thank Paul Hague and Nick Hague at B2B International for their support with data collection. The authors would also like to thank Michael Haenlein, the anonymous reviewers and Associate Editor for their comments and suggestions about how to improve the paper.

Appendix A

Table A1
Sample two frequencies.

Firm	Frequency	Percentage
Xerox	17	11.0 %
Epson	25	16.1 %
HP	71	45.8 %
Canon	24	15.5 %
Samsung	18	11.6 %
Total	155	100 %

Table A2
Descriptive statistics.

Question	Sample one (173)		Sample two (155)	
	Frequency	Percentage	Frequency	Percentage
<u>Company Involvement</u>	95	55	97	63
Sole Decision Maker	38	22	9	6
Main Decision Maker	32	19	21	14
Influencer	2	1	25	14
User	6	3	3	3
No answer				
<u>Standard Industrial Classification</u>	0	0	2	1
Agriculture, Forestry and Fishing	0	0	1	1
Mining	0	0	14	9
Construction	49	27	13	8
Manufacturing	5	3	6	4
Transportation, Communications, Wholesale Trade	20	12	16	10
Retail Trade	8	5	18	12
Finance, Insurance and Real Estate	45	26	25	16
Services (other)	12	7	28	18
Public Administration	5	3	0	0
Healthcare/medical	5	3	4	3
Education	24	14	28	18
<u>Average yearly spend on focal products/services</u>	2	1	40	26
Less than 1 k	18	10	62	39
£1-10 k	39	23	29	19
£10-25 k	44	25	11	7
£25-50 k	39	23	9	6
Over £50 k	31	18	4	3
Don't know or prefer not to say				
<u>Average yearly spend with focal company</u>	21	12	25	16
Less than 10 %	21	12	27	17
10–25 %	25	14	22	14
25–50 %	35	20	24	15
50–75 %	53	31	53	35
Over 75 %	18	11	4	3
Don't know or prefer not to say				
<u>Annual Turnover</u>	63	37	32	21
Under £500,000	36	21	38	24
£500,000 - £1 million	30	17	26	17
£1-5 million	6	3	18	12

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Table A2 (continued)

	Sample one (173)		Sample two (155)	
£5-10 million	13	8	37	23
Over £10 million	25	14	4	3
Don't know/Prefer not to say				

Table A3

Item statistics by sample.

Construct	Item	Source	Sample one		Sample two	
			Mean	SD	Mean	SD
Brand familiarity	I am familiar with the X brand (Famm1)	Kent and Allen (1994)	5.71	1.206	6.39	0.908
	I have experience of the X brand (Famm2)		5.66	1.322	6.34	1.009
Customer support services	I am knowledgeable about the X brand (Famm3)	Partanen et al. (2017), Persson (2010)	5.26	1.341	5.82	1.090
	X is able to respond to short lead times (Cust1)		5.69	1.590	5.69	1.091
	X guarantees to deliver by specified times (Cust2)		5.21	1.561	5.66	1.158
	Doing business with X is straightforward (Cust3)		4.78	1.961	6.06	1.036
	X offers product demonstrations (Cust4)		5.38	1.665	5.66	1.229
Product support services	X provides communication on market trends/changes (Cust5)	Partanen et al. (2017)	4.29	1.573	5.66	1.197
	X offers a warranty on its products (Supp1)		3.72	2.393	6.41	0.951
	X provides technical user training (Supp2)		3.54	2.214	5.63	1.117
Operational services	X provides customer support (Supp3)	Partanen et al. (2017)	4.93	2.117	5.94	1.033
	X provides project management services (Ope1)		2.77	2.329	5.47	1.240
Brand loyalty	X provides services to help us operate our products (Ope2)	Wang et al. (2018)	4.03	2.311	5.86	1.107
	X offers services to help us operate our processes (Ope3)		3.77	2.409	5.73	1.118
	We will buy X's products next time we have a requirement (Bra1)		5.29	1.617	6.12	0.939
	We will continue to buy from X in the future (Bra2)		5.66	1.436	6.25	0.937
	We are committed to X (Bra3)		4.77	1.722	5.82	1.209

Notes: SD = standard deviation

Table A4

Correlation Matrix (sample one).

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)
(1) Famm1		0.755**	0.666**	0.350**	0.327**	0.282**	0.488**	0.278**	0.276**	0.204**	0.368**	0.110	0.306**	0.275**	0.435**	0.534**	0.461**
(2) Famm2			0.614**	0.313**	0.339**	0.234**	0.407**	0.293**	0.202**	0.156**	0.351**	0.020	0.178**	0.217**	0.354**	0.470**	0.345**
(3) Famm3				0.387**	0.376**	0.371**	0.424**	0.356**	0.260**	0.177**	0.234**	0.142	0.294**	0.288**	0.394**	0.432**	0.456**
(4) Cust1					0.720**	0.625**	0.626**	0.373**	0.263**	0.249**	0.303**	0.240**	0.316**	0.295**	0.478**	0.515**	0.476**
(5) Cust2						0.574**	0.635**	0.382**	0.320**	0.247**	0.406**	0.303**	0.321**	0.282**	0.526**	0.484**	0.511**
(6) Cust 3							0.547**	0.369**	0.246**	0.233**	0.285**	0.269**	0.318**	0.398**	0.431**	0.403**	0.488**
(7) Cust 4								0.362**	0.259**	0.238**	0.370**	0.231**	0.333**	0.314**	0.618**	0.723**	0.677**
(8) Cust5									0.361**	0.360**	0.341**	0.333**	0.407**	0.335**	0.225**	0.221**	0.305**
(9) Prod1										0.461**	0.370**	0.505**	0.550**	0.533**	0.273**	0.282**	0.298**
(10) Prod2											0.461**	0.524**	0.649**	0.500**	0.208**	0.147	0.205**
(11) Prod3												0.420**	0.415**	0.388**	0.331*	0.324**	
(12) Ope1													0.497**	0.532**	0.222**	0.128	0.244**
(13) Ope2														0.584**	0.306**	0.239**	0.335**
(14) Ope3															0.287**	0.259**	0.345**
(15) Bra1																0.741**	0.765**
(16) Bra2																	0.750**
(17) Bra3																	

Table A5

Correlation Matrix (sample two).

	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)
(1) Famm1	0.780**	0.584**	0.301**	0.435**	0.456**	0.276**	0.194**	0.377**	0.291**	0.329**	0.278**	0.321**	0.361**	0.289**	0.348**	0.414**
(2) Famm2		0.541**	0.262**	0.371**	0.531**	0.224**	0.149	0.402**	0.170*	0.312**	0.239**	0.294**	0.313**	0.300**	0.410**	0.285**
(3) Famm3			0.335**	0.394**	0.390**	0.347**	0.302**	0.253**	0.393**	0.377**	0.342**	0.296**	0.375**	0.382**	0.375**	0.419**
(4) Cust1				0.652**	0.489**	0.494**	0.537**	0.297**	0.396**	0.497**	0.555**	0.496**	0.554**	0.454**	0.439**	0.529**
(5) Cust2					0.613**	0.673**	0.471**	0.472**	0.426**	0.553**	0.513**	0.555**	0.551**	0.466*	0.336**	0.546**
(6) Cust3						0.476**	0.337**	0.586**	0.442**	0.525**	0.406**	0.540**	0.480**	0.506**	0.465**	0.372**
(7) Cust4							0.457**	0.345**	0.600**	0.511**	0.480**	0.552**	0.434**	0.422**	0.226**	0.348**
(8) Cust5								0.166*	0.330**	0.436**	0.628**	0.503**	0.509**	0.410**	0.331**	0.497**
(9) Prod1									0.349**	0.249**	0.167*	0.289**	0.348**	0.288**	0.263**	0.160*
(10) Prod2										0.533**	0.384**	0.519**	0.476**	0.400**	0.294**	0.393**
(11) Prod3											0.599**	0.628**	0.531**	0.489**	0.458**	0.407**
(12) Ope1												0.522**	0.495**	0.404**	0.423**	0.564**
(13) Ope2													0.656**	0.497**	0.441**	0.471**

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Table A5 (continued)

	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)
(14) Ope3														0.512**	0.444**	0.482**
(15) Bra1															0.616**	0.539**
(16) Bra2																0.557**
(17) Bra3																

Table A6
ANOVA and Levene's test for homogeneity of variances for sample two.

Construct		Sum of squares	df	F	Sig.	Levene's Sig.
Brand familiarity	Between groups	1.941	4	0.636	0.638	0.665
	Within groups	114.535	150			
	Total	116.476	154			
Customer support services	Between groups	6.691	4	2.141	0.079	0.179
	Within groups	117.197	150			
	Total	123.887	154			
Product support services	Between groups	1.526	4	0.598	0.665	0.746
	Within groups	95.690	150			
	Total	97.216	154			
Operational services	Between groups	8.037	4	2.208	0.071	0.111
	Within groups	136.461	150			
	Total	144.497	154			
Brand loyalty	Between groups	3.146	4	1.044	0.387	0.201
	Within groups	113.029	150			
	Total	116.175	154			

Notes: for ANOVA, significance (Sig.) threshold for group differences is $P = >0.05$. The label 'Levene's Sig.' relates to the significance values for Levene's test for homogeneity of variance.

Table A7
One-way ANOVA for sample one (by turnover).

Construct		Sum of squares	df	F	Sig.	Levene's Sig.
Brand familiarity	Between groups	1.136	2	0.433	0.649	0.668
	Within groups	223.122	170			
	Total	224.258	172			
Customer support services	Between groups	4.821	2	1.498	0.227	0.929
	Within groups	273.625	170			
	Total	278.445	172			
Product support services	Between groups	6.292	2	1.009	0.367	0.380
	Within groups	530.076	170			
	Total	536.369	172			
Operational services	Between groups	11.520	2	1.517	0.222	0.223
	Within groups	645.629	170			
	Total	657.150	172			
Brand loyalty	Between groups	9.744	2	2.338	0.100	0.354
	Within groups	354.282	170			
	Total	365.026	172			

Notes: for ANOVA, significance (Sig.) threshold for group differences is $P = >0.05$. The label 'Levene's Sig.' relates to the significance values for Levene's test for homogeneity of variance.

Table A8
One-way ANOVA sample two (by turnover).

Construct		Sum of squares	df	F	Sig.	Levene's Sig.
Brand familiarity	Between groups	0.765	1	0.997	0.320	0.133
	Within groups	117.319	153			
	Total	118.083	154			
Customer support services	Between groups	3.006	1	3.548	0.062	0.050
	Within groups	129.624	153			
	Total	132.630	154			
Product support services	Between groups	0.769	1	1.100	0.296	0.583
	Within groups	107.715	153			
	Total	108.484	154			
Operational services	Between groups	3.673	1	3.871	0.051	0.887
	Within groups	144.210	153			
	Total	147.882	154			
Brand loyalty	Between groups	1.473	1	1.771	0.185	0.645
	Within groups	127.275	153			
	Total	128.748	154			

Notes: for ANOVA, significance (Sig.) threshold for group differences is $P = >0.05$. The label 'Levene's Sig.' relates to the significance values for Levene's test for homogeneity of variance.

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