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Analysis of Critical Success Factors of Laundromats in Emerging Economies Like India: An Application of Gap Analysis

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ABSTRACT

Evaluation of customers' perception and satisfaction of service quality is widely acknowledged as being a favorable strategy in the laundry industry. In recent years, the Laundromats in India have encountered difficult times due to the increasing customer demands, and due to the strong growing internal industry competition development. However, the industry's main concern around the globe is to cater for its customer needs and their desires, which are mostly addressed through personal services. Research on service quality of such a specialized sector is scarce. The present research paper aims to fill this gap by conducting a comprehensive analysis of the laundry sector in India and provide an assessment of service quality suggested by Grönroos (1982; 1990).

Servqual is being used to understand the gap between the provider and the customer of this scantily researched industry. The major findings indicate that areas where laundromats in India will have to focus in on reduction of defects and the margin of error. In case of errors, the compensation mechanism should be in place to retain customers. Secondly, the customers are too occupied in their daily routines and will not be ready to wait for delivery or collection of clothes. Hence, waiting time reduction at points of collection and delivery is another critical factor that determines the success of a laundromat in India.

Keywords: Service quality, gap analysis, laundromat, Indian laundry industry.

1. INTRODUCTION

This research is intended towards studying the organized Laundromat service industry in India. Organized Laundromat service industry in India is still at its nascent stages of growth and development and this is the

reason why I have chosen this area of research. I came up with the research question: To identify critical success factors (CSFs) that determine the success of Laundromats across India, because there have been no study undertaken in India particularly focused on the success of Laundromats. These CSFs identified from the research shall be helpful for academicians and practitioners as well.

The Indian Laundry industry is still an untapped market and has done well even in the recent tough times, which shows that the market is positive & hands on accepting the concept. The Indian market is large enough to accommodate more organized players.

Its laundry time and it seems like organized players are giving the friendly neighborhood dhobis a run for their money. With the entry of global companies into India and a firm positioning of domestic players, the laundry industry is just getting bigger and more quality-conscious. And to add to the upbeat mood, the global laundry industry has, to some extent, braved the recession.

India being the second fastest growing major economy after China, growing at 6.1% year-on-year during the first quarter of April-June, organized players are cashing in on this unique opportunity to enter the unorganized laundry market in a big way. And even as global and domestic laundry bigwigs make their presence felt, there is still a large unorganized sector waiting to be tapped.

The dry cleaning and laundry business has been least affected by the downturn and sees significant activity in the organized laundry market in India.

India has a huge unorganized sector which needs to be professionally handled. The way markets have developed in the US has not happened in India. However, India is going to grow in this business and there is a need for organized players to provide world-class services and educate the unorganized sector. For example, Wardrobe is growing at around 20% every month.

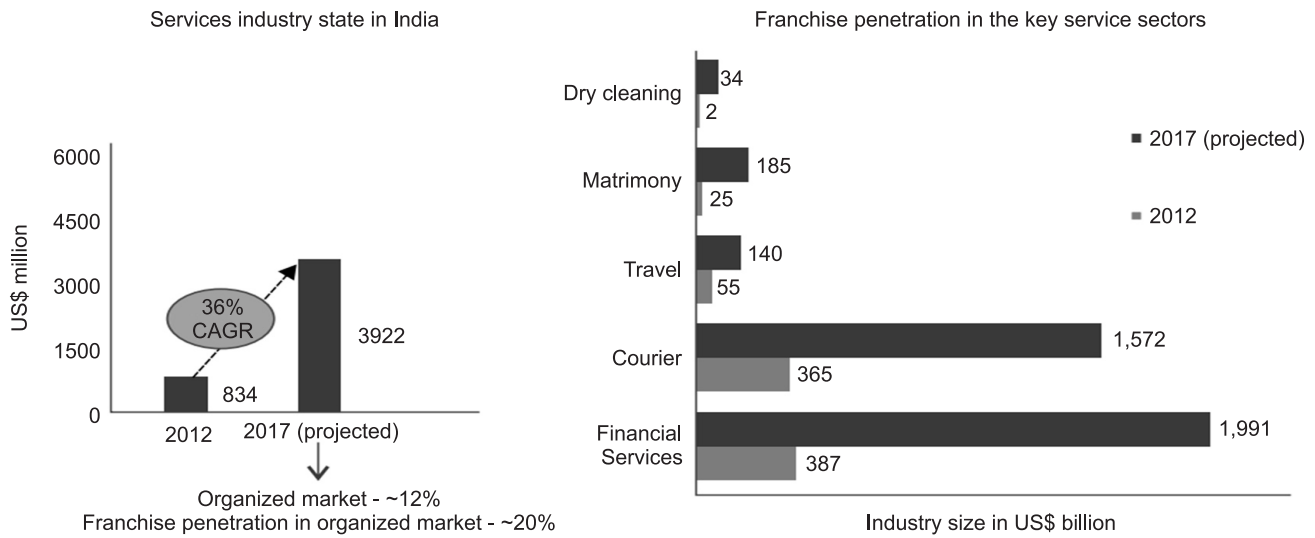
“Connectivity and brand building is crucial for us to be a success story in India.” Wardrobe came to India in 2008 with an initial investment of 150 cr and plans to open 100 high-end fabricare stores by end of this year.

According to a market research agency, The Nielsen Company, the market size of fabric cleaning, which includes detergents, powders, pre-post wash, soap cakes is Rs.12,118 crore and 2,877,587 tons respectively.

Spanish multinational express dry-cleaning chain, Pressto, came to India in early 2008 and since then there has been no looking back. “Globally, the dry cleaning and laundry industry has evolved into a much more customer friendly entity. In hard times, people may buy fewer garments but they like to keep the existing ones clean and fresh so that their usage is optimum.

According to KPMG in India estimates, the franchising industry is expected to quadruple between 2012 and 2017. There is scope for the franchising industry to contribute to almost 4 percent of India’s GDP in 2017 (assuming 6 percent Y-o-Y GDP growth between 2012 and 2017), growing from a current estimated contribution of 1.4 percent of GDP. This is also expected to create job opportunities (including both direct and indirect) for an additional 11 million people by 2017.

India has a huge market for laundry business which is yet to be tapped to its potential. However, with the coming up of a number of hospitals & hotels and even the Indian Railways turning to outsourcing of laundry activities, the industrial laundry sector in India is attracting foreign players.



Source: KPMG in India Analysis

As per The Economic Times article, *Organised laundry service players mull expansion*, the laundry services industry in India is still majorly dominated by the unorganized sector, but a few organized players—who form just five percent of this segment—hope to hit pay dirt thanks to the growing demand for high-quality services from urban consumers. Armed with state-of-the-art equipment, most of them are looking at a second round of expansion.

Quality of a product (or service) may be observed as its features by means of which certain needs of customers are satisfied. Theory and practice of marketing introduce various approaches to quality rating of certain products and service that mainly depend on the subject of analysis of that complex problem. The fact is that consumers observe and rate the same product differently, based mainly on their own motives and attitudes. According to the fact, that consumer's attitude on the quality is a key issue of quality level; measurements must be based on field investigation of the consumer population. The Laundromat service being at its nascent stage in the country, evaluation of customers' perception and satisfaction of service quality is widely acknowledged as being a favorable strategy in the industry. In recent years, the Laundromats in India have encountered difficult times due to the increasing customer demands, and due to the strongly growing internal industry competition development. Therefore, the Laundromats that are able to provide quality services to its ever demanding customers in a warm and efficient manner, are those businesses which will be more likely to obtain a long term competitive advantage over their rivals. However, since the Laundromats are offering intangible and perishable personal service encounters, managing these services in terms of offering quality experience to their customers, it must be of a paramount concern of any Laundromat, and the way which personalized services are provided.

Laundromats that chose the application of quality concept as a key factor of success should experience the growth in the satisfaction of customers, i.e. successfully position on the market and thus gain larger profit. However, trying to reach the high level of the quality of laundry services, Laundromats very often meet with problems of an adequate measuring of the service quality. Firstly, Laundromats do not know what their customers consider as important when evaluating the quality of services and very often do not have reliable methods for determining the expectations and perception of customers when the service quality is concerned (Blešiš, Ivkov-Džigurski et. al., 2011). As a solution to this problem, many authors

suggest different methods for measurement of service quality and customer satisfaction. Thus Nitin et. al., (2005) gave detailed evaluation of 19 models of quality created in the period between 1984-2003. Although the research results did not lead us to one universally accepted model, the biggest support and the best complements were given to GAP model of quality and dimensions of quality presented in SERVQUAL model. Since it was introduced, SERVQUAL model has served as basis for quality measurement of different services in numerous researches. However, most researchers who deal with quality measurement modify and adapt these models to the service features in their respective industry of research.

An individual's satisfaction with outcomes received from a hospitality experience results from a comparison of these outcomes with expectations. Expectations can be described as a mutable internal standard which is based on a multitude of factors including needs, objectives; past personal or vicarious experiences with the same establishment laundry, with similar establishments, and the availability of alternatives (i.e. are there any other establishments in town?). Taking into account the aforementioned, the main objective of this paper is to assess the expectations and perceptions of the customers using laundry services, to calculate the discrepancy between the experienced and expected service quality and estimate which determiners are considered the most significant by the consumers, thus giving insights into what the Laundromats must focus upon.

2. LITERATURE REVIEW

2.1. GAP Model

In order to comprehend the service quality better, Parasuraman, Zeithaml and Berry developed Gap model of service quality. The model was first introduced in 1985 (Parasuraman et. al., 1985). Its purpose was to analyze the source of problems in quality and to give support to management to simply understand the ways of improving the service quality. Key features of this model are recognized in emphasizing the errors in quality. The errors emerge between the customers and the service provider, regarding the perceptions and expectations. This model primarily demonstrates the process of the emergence of service quality (Ljubojeviš, 2004). The basic gap is the Consumer gap, which emerges as the discrepancy between customer expectation regarding service and customers perception of the service delivery in the Laundromat. Customer gap is the outcome of one of 4 gaps of a service company, which emerge as certain discrepancies within the design and delivery phases of service to the consumers. Five key discrepancies were identified (Parasuraman et. al., 1985):

Gap 1: The gap between customer expectations and management's perceptions of those expectations;

Gap 2: The gap between management's perception of what the customer wants and specifications of service quality;

Gap 3: The gap between service managerial quality specifications (quality, standards, forms of delivery) and the actual delivery of the service;

Gap 4: The gap between service delivery and what the company promises to the customer through external communication. All four influence the total perception of service quality and customer satisfaction;

Gap 5: Represents difference between customers' expectations regarding the service and their perception about the specific service. The last gap is the result of all the previous gaps.

2.2. Servqual Model

As result of the research conducted in companies which provide service (banking, telecommunication, insurance company, maintenance and repair of apparatuses), the authors of Gap model developed SERVQUAL model for measuring service quality (Parasuraman et. al., 1985, 1988, 1991, 1991a, 1994). Parasuraman et. al., (1985) within the original SERVQUAL model defined service quality using 10 determinants of quality: reliability, responsiveness, competence, credibility, access, courtesy, communication, assurance, empathy and tangibles. Parasuraman et. al., (1988) reduced those into the following five dimensions and further into 22 categories:

TANGIBLES: Appearance of physical facilities, equipment, personnel, and communication materials;

RELIABILITY: Ability to perform the promised service dependably and accurately;

RESPONSIVENESS: Willingness to help customers and provide prompt service;

ASSURANCE: Knowledge, courtesy and trustworthiness of the personnel;

EMPATHY (UNDERSTANDING THE CUSTOMER): Making the effort to know customers and their needs.

SERVQUAL model became the model with the most widespread application in the process of then measurement of service quality. However, the model as well meets criticism when observed from conceptual and methodological aspect (Buttle, 1996; Asubonteng et. al., 1996). Despite this criticism, the model served as a base for a number of researches of the quality in the service activities.

2.3. Critical Success Factors:

Critical success factors (CSFs) are those few things that must go well for an individual or an organization to ensure success in a business undertaking (Digman 2004). In addition, they represent the managerial or individual activities that an organization must pay particular and continuous attention to in order to achieve the level of performance essential to achieve desired goals (Feindt et. al., 2002). However, the study on the survival of the firms by Littunen et. al., (1998) showed that the success of a new firm is strongly affected by the start-up phases. Thus, analyzing and identifying the CSFs for new ventures is a basic key to reducing the number of start-up failures while increasing the likelihood of subsequent survival or success (Digman 2004). Since CSFs are highly dependent on a company's situation, it is often helpful for ecommerce new ventures to start considering the business environment and benefits of ecommerce, analyzing key success factors in e-commerce activities in order to gain competitive success (Jeffcoate et. al., 2002).

While there is no research undertaken to understand the customer expectation and perception arising from the laundry industry, there are some hints we could find from the hotel industry research papers, which consider laundry and ironing as a part of its services. According to Christou Loizos and Hadjiphanis Lycourgos in their paper titled "A Customer's Expectation and Perception of Hotel Service Quality in Cyprus", customer expectation of laundry service being good was found to be 6.18 and the perception score was 4.22, thus a GAP score of (P-E) (-1.96) which is one of the larger GAPS in their survey undertaken. Another research undertaken by Veasna UNG to understand the customer satisfaction in hotel industry under the research titled "An assessment of customer satisfaction in hotel industry in Cambodia" found that customer expectation of laundry service at hotels was found to be 5.62 and the perception score was 5.60, thus a GAP score of (P-E) (-0.02).

3. METHODOLOGY

The primary data was collected by distributing questionnaires online. Out of 126 questionnaires taken, all the 126 were usable. The questionnaire was framed with guidance from researchers who have framed questionnaires in this related areas of service industry for research earlier. The ratings for each of the Laundromat attributes in the 21 questions of the questionnaire were based on the 5-point scale ranging from 5 - strongly agree to 1 - strongly disagree.

The questionnaire used in this research consists of two parts. The first part of questionnaire comprised of the questions relating to the demographic information about the respondent. The second part consisted of 21 Laundromat attributes as 21 questions, for which respondents were asked to indicate the perceived importance of the attributes when they choose a Laundromat and their perceptions of actual Laundromat performance during their use of the service thus keeping an aim to examine the difference. Attributes were measured on a five-point Likert type scale ranging from 1, strongly disagree to 5, and strongly agree, to analyze the performance. The data obtained from all questionnaires are statistically processed, analyzed using Microsoft Excel and the quantified results from the questionnaires define the level of service quality.

3.1. Sample

The research was conducted in the organized laundry service category spread across different states within India, during the months of February - April 2015. In total, 126 questionnaires were filled and 126 (100%) usable questionnaires were obtained.

Table 13.1
Description of research sample

<i>Variable</i>	<i>Frequency</i>
Gender	
Male	57
Female	69
Occupation	
Self-employed	24
Employed	46
Student	40
Home maker	16
Location	
Bangalore	7
Calicut	14
Chennai	15
Cochin	4
Goa	1
Hyderabad	1
Kollam	21
Mumbai	37
Pune	18
Sholapur	1
Thrissur	7

The sample included 57 (45.2%) males and 69 (54.8%) females among the respondents. When the variable occupation is concerned; the majority of respondents are either employed (36.5%) or are students (31.7%). Rest included self-employed (19.1%), and homemaker (12.7%). The top three locations of these respondents were Mumbai (29.3%), Kollam (16.6%), and Pune (14.2%). Other locations included Bangalore, Calicut, Cochin, Goa, Hyderabad, Sholapur, and Thrissur.

The data collected from the survey are stored in excel database and further analysis were carried out using the Microsoft Excel V.2013.

4. FINDINGS

A comprehensive questionnaire was used to collect feedback of the customers using Laundromat services. It included questions of all the important processes undertaken by a Laundromat which would affect the overall satisfaction of the customer. Each question was provided with 5 options, that is using a 5 point rating scale. Servqual helps us to illuminate the factors that require improvements or which portrayed a large gap between expectation and perception score. Greater the negative score greater is the gap between perception of the service availed and expectation of the service rendered.

Table 13.2
Weights assigned for Servqual dimension (Out of 100)

<i>Dimensions</i>	<i>Weight</i>
Tangibles	20
Reliability	25
Responsiveness	25
Assurance	15
Empathy	15

$$\text{GAP (Service quality gap)} = \text{Service perception (SERVPER)} - \text{Service Expectation (SERVEXP)}$$

The analysis helps us to identify the critical success factors related to the customer's needs and requirements. These critical factors are the causes for lower satisfaction level of customers and reasons for the customer switching to another Laundromat or discontinuing use of current one. Hence the Laundromats could focus more on these parameters as they depict potential areas of improvement which could help reduce the gap between the customer expectation and perception thus enhancing customer satisfaction, retention and increased brand loyalty. This can also help Laundromats in word of mouth publicity as a free and effective marketing tool. Below given is a table illustrating the GAP scores from the Laundromat experience survey.

From the Laundromat Servqual, we were able to analyze the GAP between the customer perception and customer expectation from various attributes of the Laundromat services offered. We measured the quality of service delivered based on the customer assessment of the services offered.

From the above table, we can understand the dimension which depicted the highest deviation from the customer expectation, i.e. Assurance provided by the Laundromats to their customers.

As we can see from the above table, the highest deviation from customer expectation were: Assurance (-1.61), Responsiveness (-1.57), and Reliability (-1.48).

Table 13.3
GAP Scores of the Laundromat customer satisfaction survey

<i>Dimension Items</i>	<i>Gap Score</i>	<i>Gap Score for Dimension</i>	<i>Servqual Weights</i>	<i>Weighted Gap Score</i>
<i>Responsiveness</i>				
1. Your laundry service provider offers prompt service to you	-1.51			
2. Customer support team of your laundry service provider is always accessible	-1.56			
3. The billing counter staff at your laundry service provider always helps you with your queries	-1.19	-1.57	25	-39.14
4. Waiting time at billing counter of your laundry service provider is very short	-2.01			
<i>Reliability</i>				
1. Information provided by your laundry service provider with regards to service offering and promotions are always accurate and up to date	-1.31			
2. Clothes washed by your laundry service provider never have any issue with regards to odor or stain	-1.78			
3. Clothes ironed by your laundry service provider never have any issue with regards to odor or burn mark	-1.35	-1.48	25	-36.90
4. Your laundry service provider always delivers in the promised time and is consistent in doing so	-1.43			
5. Collection of clothes from your home by the laundry service provider is always timely as promised	-1.52			
<i>Assurance</i>				
1. Your laundry service provider provides you with a very good mechanism to compensate for any error/ defect in washing and ironing	-2.88			
2. Your laundry service provider provides you with a receipt and clearly printed T&Cs	-1.62	-1.61	15	-24.08
3. Information provided by your laundry service provider regarding their store address and phone number is always valid	-0.85			
4. The treatment given to you by your laundry service provider gives you a good feel of that laundries culture	-1.08			
<i>Tangibility</i>				
1. Your laundry service provider provides you with an error-free billing	-1.62			
2. Offers provided by your laundry service provider are conveyed accurately and the same reflects in the bill	-1.25			
3. Your laundry service provider uses signboards for directing you to the laundry collection center	-1.17	-1.35	20	-26.98
4. Your laundry service provider gives you clear information regarding pricing and delivery while dropping off clothes	-1.23			
5. Your laundry service provider packs and delivers clothes in a good quality laundry bag	-1.47			

<i>Dimension Items</i>	<i>Gap Score</i>	<i>Gap Score for Dimension</i>	<i>Servqual Weights</i>	<i>Weighted Gap Score</i>
<i>Empathy</i>				
1. Your laundry service provider offers solutions to specific needs in terms of speedy delivery and delivery location	-1.08			
2. Employees at your laundry service provider are consistent in treating customers well	-1.81	-1.38	15	-20.75
3. Employees of your laundry provides individual attention to you by understanding queries and giving appropriate solution	-1.26			

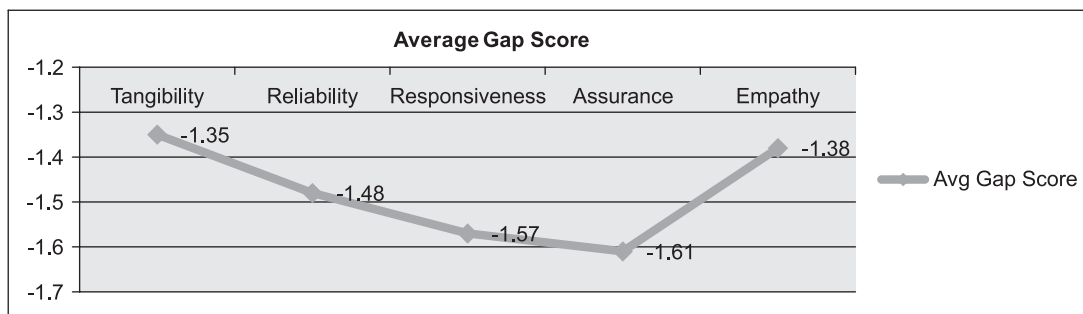


Figure 13.1: Deviation in Servqual dimension for Laundromat Survey analysis

Table 13.4
Average Gap Score of the Laundromat Servqual Analysis

<i>Dimensions</i>	<i>Average Gap Score</i>
Tangibility	-1.35
Reliability	-1.48
Responsiveness	-1.57
Assurance	-1.61
Empathy	-1.38

From the above Servqual analysis, we can easily identify the major critical success factors that relate to the wants and needs of the customers availing services from a Laundromat. These are the parameter that would help us to identify the various potential areas of improvement for Laundromats in meeting the customer’s expectation.

Table 13.5
Top two deviations in each dimensions of Servqual analysis

<i>Dimension</i>	<i>Critical success factors</i>	<i>Deviation</i>
Assurance	Your laundry service provider provides you with a very good mechanism to compensate for any error/ defect in washing and ironing	-2.88
	Your laundry service provider provides you with a receipt and clearly printed T&Cs	-1.65
Responsiveness	Waiting time at billing counter of your laundry service provider is very short	-2.01
	Customer support team of your laundry service provider is always accessible	-1.56

<i>Dimension</i>	<i>Critical success factors</i>	<i>Deviation</i>
Reliability	Clothes washed by your laundry service provider never have any issue with regards to odour or stain	-1.78
	Collection of clothes from your home by the laundry service provider is always timely as promised	-1.52
Empathy	Employees at your laundry service provider are consistent in treating customers well	-1.81
	Employees of your laundry provides individual attention to you by understanding queries and giving appropriate solution	-1.26
Tangibility	Your laundry service provider provides you with an error-free billing	-1.62
	Your laundry service provider packs and delivers clothes in a good quality laundry bag	-1.47

5. DISCUSSION

1. Assurance:

- (a) No customer landing at a Laundromat would like to see their clothes in even worse conditions when it is returned. And if he/she does see it, it is very important that they are handled in such a nice manner that they do return to the Laundromat and do not spread negative publicity. The compensation for the mess must be provided to the customers in a satisfactory manner and Laundromats must understand that the customers have the right to claim it
- (b) Laundromats must always understand the importance of a clearly printed bill along with the terms and conditions for the use of service. It is always important that this is ensured or customer can feel that the Laundromat is cheating them

2. Responsiveness:

- (a) Laundromats must understand that customers would be least interested to visit their outlets if the waiting time is high
- (b) An anytime accessible customer service is what the customer expects and would prefer opting for, for their Laundromat requirements

3. Reliability:

- (a) It is the least expected thing that a customer would expect: clothes returned with odor or stains. Laundromats must understand the customer needs of using a Laundromat and thus be careful in each of their processes
- (b) Laundromats must respect the valuable time of their customers and thus reach at their home is the promised collection time

4. Empathy:

- (a) A customer would never want to be ill-treated, especially when he is paying you! Laundromats must keep in mind the customer type that visit their centers and thus employee and train frontend employees accordingly to handle the customers well

- (b) When a customer is encountered with a query, he expects the experts (Laundromat) to answer. Laundromats must ensure that their employees are well trained to answer any queries that arise in the mind of customers thus avoid any confusion

5. **Tangibility:**

- (a) Customers hate to see a bill with errors. They trust you when you bill them. Laundromats must ensure they use updated billing software and apply relevant schemes when applicable. Moreover, if any error is encountered, they must ensure the customer need not run around and a correction must be provided without any delay
- (b) When customers pay Laundromats much higher for their services than that of the unorganized sector, they expect more quality and service in return. If clothes are returned in an old fashion which would not much appeal to them, they tend to be dissatisfied. Laundromats must ensure customers feel they are receiving a high value for the money they have shed for.

6. CONCLUSION

The present study aimed to establish the relationship between customer's expectation and perception of using laundry service with relation to Laundromats in and across India. The results of above study indicated that customer expectation and perception did not find the ultimate kind of satisfaction with regards to the services offered by Laundromats presently. Their perceptions were lower than their expectations of service quality in all the five factors identified for the study. The SERVQUAL GAP is the highest in case of Assurance (-1.61) followed by Responsiveness (-1.57) and Reliability (-1.48), so, the burning issue in providing the quality in terms of compensation mechanism besides assuring other attributes like accurate laundry location and contact number, and clearly printed terms and conditions on the receipt. In order to minimize the gap between the customers' expectations and their perceptions of actual service delivered, the Laundromats and personnel in the service have to ensure that every contact with customers results in positive experience for the guests. First, it is necessary to define quality standards that are transparent and measurable. Those appear as procedural quality dimensions, including timeliness, promptness to meet the customers' needs and properly controlled coordination; and as social dimensions, including positive attitude, solving live problems, giving individual attention to customer. Prior to any planning, it is necessary to establish the Laundromats current position. It is achieved by objective assessment of the level and quality of service delivered by the Laundromat. The results of this and similar researches may contribute to estimation of current level of service quality and support in planning aimed at correcting current deficiencies. Market segmentation strategies could assist Laundromats to better detect target groups and provide services tailored to their customers' needs.

As can be said for all research, this study does not proceed without limitations. This research too has some limitations that should be addressed by future research. First, this study only pertains to the organized Laundromat service sector in India. Second, only Tier-I cities were included for survey. The time period for the study was short and thus the limited number of respondents.

This research will be helpful to the academic field as well to practitioners. This study can form a base for future research. It might also be useful to replicate this study, perhaps in other cities. It would also

be useful to explore whether loyalty to service provider extends to brand loyalty, an issue that would be particularly relevant for Laundromat service providers with multiple brands.

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