

RETAIL EXPERIENCE: EVIDENCE FROM ORGANIZED AND UNORGANIZED INDIAN RETAIL SECTOR

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ABSTRACT

The whole concept of shopping in India has revolutionized by changing in terms of format and consumer buying behaviour. The modern format has sprawls its legs by offering shopping, food and entertainment under one roof to the customers. The industry is going through tough competition, busy in designing various kinds of strategies in order to retain and finding the prospect customers. In such a situation, there is a need to provide complete retail experience to the shoppers for retaining and building long term relationship with them. Retail experience consists of all those elements which are capable of influencing pre and post shopping behaviour of customers. The paper attempts to provide an overview of Indian retail sector and customer retail experience. The objective of this study is to give comparative picture of retail experience of both organized and unorganized retail sector through descriptive statistics.

Keywords: India, Organized Retail Sector, Unorganized Retail Sector, Retail Experience.

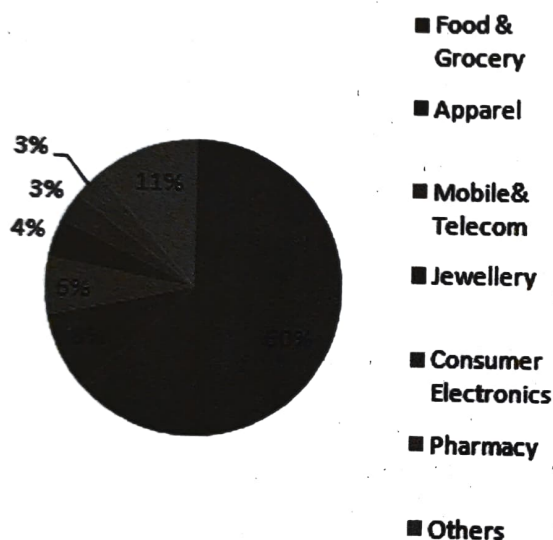
1. Introduction:

Indian retail industry is contributing around 14-15 per cent of GDP and has a worth of US\$ 500 billion, is among the top five retail markets in the world. With the growth of Indian economy and the various encouraging government policies, the future of Indian retailing is promising. Indian retail sector is separated into two parts one is unorganized and another one is organized sector. Where unorganized retailing means traditional formats of low cost retailing such as Kiryana shops (Mom-n-Pop stores) paan/beedi shops, general stores, hand cart, pavement vendors, etc. On the other hand organized retailing is defined as licensed retailers, who are registered for sales tax, income tax etc for e.g. shopping malls, hyper markets, departmental stores etc. The unorganized retail sector has more than 90 per cent share of Indian retail market creating lot of scope for the organized sector to penetrate in this promising economy.

The whole concept of shopping in India has revolutionized by changing in terms of format and consumer buying behaviour. The modern format has sprawls its legs by offering shopping, food and entertainment under one roof to the customers. According to the report of Deloitte 2013, of the total retail sector 92 per cent is unorganized, those that fall under mom & pop stores and only 8 per cent is under organized sector having multiple stores. In the report it is also stated that 'Food and Grocery' contributed nearly 60.0 per cent of total revenues in the retail sector followed by

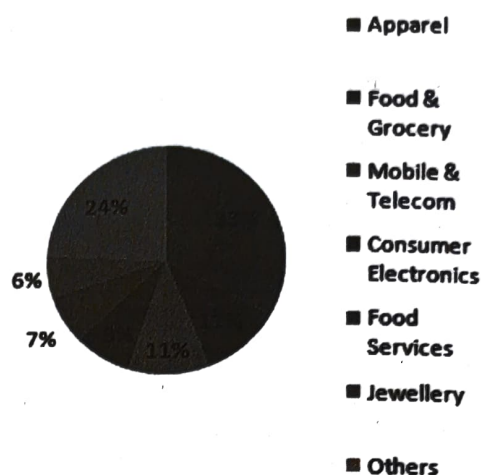
'Apparel' (8.0 per cent) as depicted in figure 1. In India the penetration of organized retail sector is low (8 per cent) as compared to other countries such as the US (85 per cent). Within the organized retail sector, apparel is the largest segment followed by "Food and Grocery" and "Mobile and Telecom" as shown in figure 2. According to the report of IBEF 2013, demand for western outfits and readymade garments has been growing at 40-45 per cent annually and it is expected that by 2015 penetration of apparel industry will increase to 30-35 per cent.

Figure 1 : The \$ 500 Billion Retail Sector



Source: Deloitte, Jan 2013

Figure 2: Market Break-up by Revenues of Organized Retail Sector.



Source: Deloitte, Jan 2013

1.1. Unorganized Retail Sector in India

Unorganized retailing has around 90 per cent market share of total retail industry. It is expected to grow at an average annual rate of 5% over the next year. The sale of unorganized retail has increased from 309 billion in 2006-07 to reach US \$ 496 billion in 2011-12. It is more preferred by the customer in comparison to organized as they are more convenient and easy to approach. According to the report of Technopark Advisers Pvt. Ltd. the number of traditional retailers is approximately 13 million. The various classification of unorganized retail store has been explained in table 1. Due to the competitive environment created by organized retailers, there will be enhancement of current services provider by traditional retailers such as credit sales, bargaining, loose items, convenient timings and home delivery are few on the list.

Table 1: Types of Conventional Retailers.

Types of Traditional Retail Outlets	Products
Fruit & vegetable sellers	Fruits and vegetables
Food stores	Bakery, dairy products, processed food & beverages.
Non-Vegetable Store	Chicken and mutton.
Kirana I	Bakery, dairy products, processed food, home and personal care and beverages.
Kirana II	Kirana - I store + cereals, pulses, spices and edible oils.
Apparel	Men's, women's & infant wear
Footwear	Men's, women's, kid's footwear
Hardware	Sanitary ware, door fitting, tiles
General mechanize	Lighting, stationery, toys, gifts & crockery

Source : Sharma and Kumar, 2012.

1.2 Organized Retail Sector in India

The organized retailing in India is at budding stage as Indian retail industry is highly dominated by unorganized retail

sector. Evolution of organized retailing in India was started late. In 1980s single brand retail such as Raymond, Bata, liberty etc was having its existence in metros only. During

1990s multi brand retailing was introduced to Indian market and shopping centres came into the picture in 1995. Shopping malls and hypermarket started showing up in new millennium. But today Indian retail sector has witnessed a tremendous growth in organized segment, providing lot of opportunities for the domestic as well as foreign players to expand their ambitious plans. It is due to the fact that most of the developed nations markets are saturated and developing

ones are not prepared, in such a situation with high economic growth, globalisation and changing lifestyle of highly diverse demography India has acquired an important position in international market. According to the Global index Indian market has been forecasted as the leading destination for retail investment & business development. The following table depicts the format of Indian organized retail sector with examples of key players in the same.

Table 2: Formats of Indian Organized Retailing

Organized Retail Formats	Examples
Departmental Stores	Pantaloon has 65 stores, Trent operates 59 stores, Shoppers Stop has 51 stores and Reliance Retail has launched Trends in this format
Hypermarkets	Pantaloon Retail is the leader in this format with 160 Big Bazaar stores, Hyper City, Trent (Star Bazaar), Spencer's (Spencer Hyper), Aditya Birla Retail (More.) and Reliance are some players.
Supermarkets/ Convenience Stores	Aditya Birla Retail (More with 640 stores), Spencer's (Daily with 220 stores), Reliance Fresh (453 stores) and REI 6Ten (350 stores) are the major players in this format
Specialty Stores	Titan Industries with 320 World of Titan, 130 Tanishq and 177 Titan Eye+ shops. Vijay Sales, Croma, E-Zone and Viveks are into consumer electronics. Landmark, Crossword and Odyssey focus on books, gifts and entertainment.
Cash & Carry Stores	Metro cash and-carry model in India; the company operates six stores across India. Bharti Walmart started cash-and- carry outlets, with the first one being set up in Amritsar, Punjab.

Source: IBEF August 2013

2. Literature Review:

2.1 Background of Retail Experience

World retail industry has become a battleground where both types of retail format organized and unorganized are struggling for their survival and growth. The industry is going through tough competition, busy in designing various kinds of strategies in order to retain and finding the prospect customers. In such a situation, there is a need to provide complete retail experience to the shoppers for retaining and building long term relationship with them. Retail experience consists of all those elements which are capable of influencing pre and post shopping behaviour of customers. The probability of the customer's re- visiting, positive word-of- mouth publicity, spending time and money, retail patronage, loyalty, profit and customer satisfaction increases if they have gone through favourable shopping experience during their decision making and consumption process (Mehrabian and Russel, 1974; Holbrook and Hirschman, 1982; Donovan and Rossiter, 1982; Lucas, 1999; Arnold et al., 2005; Wong and Sohal, 2006; Crosby and Johnson, 2007). According to the literature, retail experience is like a new weapon in the hands of the retailers to earn competitive advantage and creating new dimensions of experience economy (Pine and Gilmore, 1998; Shaw and Ivens, 2002; Meyer and Schwager, 2007). Retail experience is holistic in

nature as it is the combination of customers cognitive, sensory, emotional, social and physical responses towards the providers of goods and services, this experience is influenced by not only those elements which the retailer can control but also by the elements which are outside his control (Carbone and Haeckel, 1994; Berry et al., 2002; Mascarenhas et al., 2006; Meyer and Schwager, 2007; Verhoef et al., 2009). Therefore experiences are completely personal which varies from individual to individual that means no two person can have the same degree of experiences (Pine and Gilmore, 1998) as it is the end result of the interaction between individual state of mind and environmental stimuli (Berry et al., 2002, 2006).

2.2 Determinants of Retail Experience

The term atmospheric was first introduced by the Kotler (1973) and after that many researchers have identified its various elements and have studied its impact on customer shopping behaviour. Berman and Evans (1995) have presented four important categories of store atmospheric variables such as external variables which are exterior to the store and may not be manipulated by the retailer, general interior variables like music, colour, temperature, staff, etc which can be easily modified by the retailers and have been discussed a lot by the researchers, layout and design variable and the fourth factor is point of purchase and decoration.

Turley and Milliman (2000) added fifth category of human variables to this list which consist of elements regarding store staff and crowd in the store.

Many researchers have empirically tested the impact of store environmental cues such as store atmosphere, product assortment, price/quality, location, store convenience and service quality on customers store evaluation, satisfaction and selection of store (Bearden, 1977; James et al., 1976; Louviere and Johnson, 1990; Steenkamp and Wedel, 1991; Gail and Scott, 1995; Bloemer and De Ruyter, 1998; Hackl et al., 2000; Outi, 2001; Juhl et al., 2002; Thang and Tan, 2003; Anselmsson, 2006).

It can be seen from the literature that retail marketing researchers have keen interest to know the impact of in-store retail environment on the shopping experience of the customers. (Belk, 1988; Berry et al., 2002; Bitner, 1992; Gentile et al., 2007; Healy et al., 2007; Holbrook and Hirschmann, 1982; Meyer and Schwager, 2007; Naylor et al., 2008; Schmitt, 2003; Sousa and Voss, 2006; Verhoef et al., 2009) and the most widely studied factor is ambience cues comprises of music (Milliman, 1986; Yalch and Spangenberg, 1990; Areni and Kim, 1993; Herrington and Capella, 1994; Dube et al., 1995; Herrington and Capella, 1996; Yalch and Spangenberg, 2000; Chebat et al., 2001; Jacob, 2006), lighting (Areni and Kim, 1994; Summers and Herbert, 2001) and olfactory cues (Bone and Ellen, 1999; Davies et al., 2003; Ward et al., 2003). In the retail industry, store staff plays a significant role in anticipating customer expectations, creating value for shoppers and constructing emotional bonds for long term relationships (Bitner, 1992). Delivering product related information, problem solution, handling of grievances and post sales service by the knowledgeable and trained personnel also number of staff, their appearance expertise, skill, attitude, body language, and behaviour helps in providing high quality of experience to shoppers (Jain and Bagdare, 2009; Bitner, 1992; Turley and Milliman, 2000). In the literature of service marketing, importance of convenience to shoppers have broadly been explored. Convenience plays an important role between customer and service provider in building relationship. Many studies have considered inconvenience as a major reason for the end of customer relationship (Keaveney, 1995; Pan and Zinkhan, 2006) on the other hand convenience is the reason for strong relationship (Seiders et al., 2007). There is another important factor which is not much talked about in literature i.e. waiting for service in a retail store which can lead to unfavourable shopping experience, resulting into consumer dissatisfaction (Katz et al., 1991).

3. Objectives of the Study.

- To give an overview of organized and unorganized retail sector of India.
- To give an overview of retail experience and its determinant.

- To study retail experience of the customers of both organized and unorganized retail sector by providing comparative picture of the same through descriptive statistics.

4. Research Methodology

Population for this research was considered as people who visit organized and unorganized retail stores in Jaipur city for the purpose of shopping. Two important segments of retail i.e. grocery and apparel was taken for the study. A sample of 136 respondents (68 from each sector) was collected through convenience sampling. The store intercept method is used for this study which has been well accepted (Hornikk and Ellis, 1988), as it is convenient, cost effective and easy to implement (Burns and Bush, 2003).

The tool used for the field study was structured questionnaire that measured responses of the customers on five-point Likert scale ranging 1= strongly disagree(SD), 2= disagree(D), 3= neutral(N), 4= agree(A) and 5= strongly agree(SA). The actual items in the questionnaire consist of 35 generated on the basis of extensive literature study. The measurement items are related to retail environment cues, categorized into five broad factors i.e. retail atmospherics, retail convenience, retail staff, retail services and product assortment/price. The section related to demographic variables composed another section of questionnaire.

5. Discussion and Results

5.1 Descriptive Statistics of Customer Profile

The respondents under study consisted of 78 females (57.4 per cent) and 58 males (48.6 per cent). The maximum respondents were under age category of 20-30 years (54.4 per cent) followed by 31-40 years (29.4) and the least from the category of 41-50 years (2.9 per cent). The majority of the respondents (67.6 per cent) were married and rest 30.9 per cent were un-married. The major chunk of the respondents (50 per cent) had professional educational qualification such as management, engineering, etc. and least 8.8 per cent had intermediate qualification and the rest were graduate (16.2 per cent) and post graduate (25 per cent). Majority of the respondents were living in nuclear family with 73.5 per cent and the rest were living in joint family (26.5 per cent). The major part of the respondents monthly income fall in the category of 25001-50000 (32.4 per cent) with 54.4 per cent respondents had paid employment as their occupation i.e. service.

The results of respondents' demographic and socio-economic characteristics were summarised in Table 3.

Table3: Respondents' Demographic and Socio-Economic Characteristics

Type of store			Numbers
1. Organized			68
2. Unorganized			68
Total			136
Gender			Number
1. Male			58 (42.6%)
2. Female			78 (57.4%)
Age(in years)	Male	Female	Total
20-30	30	44	74 (54.4%)
31-40	20	20	40 (29.4%)
41-50	4	0	4 (2.9)
51-60	4	14	18 (13.2)
Monthly Income(in Rupees)			Total
Less than 10000	2	2	4 (2.9%)
10001-25000	14	20	34 (25.0%)
25001-50000	18	26	44 (32.4%)
50001-75000	16	20	36 (26.5%)
75001-100000	2	4	6 (4.4%)
Above 100000	6	6	12 (8.8%)
Education	Male	Female	Total
Intermediate	6	6	12 (8.8%)
Graduate	12	10	22 (16.2%)
Post Graduate	8	26	34 (25%)
Professional	32	36	68 (50%)
Marital Status			Total
Married	38	54	92 (67.6%)
Unmarried	18	24	42 (30.9%)
Divorce	2	0	2 (1.5%)
Family Status			Total
Nuclear	38	62	100 (73.5%)
Joint	20	16	36 (26.5%)
Occupation			Total
Student	10	18	28 (20.6%)
Housewife	0	22	22 (16.2%)
Service	36	38	74 (50.4%)
Business	10	0	10 (7.4%)
Retired	2	0	2 (1.5%)

Source: Primary Data

5.2 Customers Experience Related to Retail Environmental Cues at Both Organized and Unorganized Retail Sector.

On the parameters of store atmosphere, the organized retail store undoubtedly have an edge over unorganized retail stores by providing better window displays with mean score

of 3.94(2.97 for unorganized stores), store ambience with pleasant smell 3.35(2.41 for unorganized stores), appropriate lights to examine the product 4.21(3.94 for unorganized stores), comfortable temperature of store 3.97(2.91 for unorganized stores), store layout 3.88(2.71 for unorganized stores), cleanliness 4.29(3.91 for unorganized stores) and

appropriate/secure parking facilities 3.82/3.65(2.71/2.53 for unorganized stores). On the ground of shopping convenience unorganized retail stores scores better than their organized counter parts in respect to convenient shopping hours with mean of 3.85(3.44 for organized stores) and quick billing process 3.76 (3.56 for organized stores). Personal discussion with the respondents reveal that due to the location convenience and personal interaction with the shopkeeper they can shop on their convenience time in unorganized stores as well as unlike organized stores they don't have to wait in a queue at billing counters for their exit from the stores. The only dimension on which customers finds in convenience is the lack of payment options available at unorganized stores as most of them do not accept debit or credit cards hence mean score is low 2.47 (4.26 for organized stores). According to the study unorganized retail stores have better results on the parameter of retail staff in comparison to organized retail stores. The results of the mean scores are as follows, professional and knowledgeable sales person 3.62(3.47 for organized stores), friendly and helpful sales person 3.94 (3.71 for organized stores), prompt services 4.03 (3.65 for organized stores), personal attention 3.97 (3.15 for organized stores) and responsive to complaints 3.85 (3.76 for organized stores). The contemporary retail stores often claimed that their staffs are well trained and professional, always ready to resolve the problems of customers, but the present study results are contrary to this. As per the shopping experienced of the respondents, staff of some organized retail stores do not have proper knowledge about the products and as a result failed to provide right information to the customers. Some respondents felt that the salesperson at stores are not responsive to their complaints and are not

friendly and helpful. Whereas local retailers are very much familiar with their customers and give them personal attention as they have knowledge about their customers' preferences. Customers of organized retail stores found their experience satisfactory in terms of product assortment with mean 4.06 which is higher than that of traditional retail stores with mean 3.79. In terms of price quality relationship respondent felt that the prices at contemporary stores are much higher than the quality of product provided to them. According to them the reason for higher prices could be the availability of branded products under one roof with attractive store atmosphere. There is no doubt that these stores follow attractive pricing strategies by providing heavy discounts but then also unorganized retailers are ahead of them as they provide opportunity of bargain to their customers which gives inner pleasing satisfaction to the shoppers. Retail experience with traditional retail stores is influenced by the services provided by them to their customers. The dimensions such as facility of placing orders on telephone, service of home delivery, facility of getting fund back on the return of the products and credit facility given by the local retailers help them to play dominating role in Indian retail sector. According to the study customers find exchange policy in case of defect of the product at unorganized retail stores more convenient in comparison to organized retail stores with mean scores 4.06 (3.56 for organized store). As there are various terms and conditions need to be followed by the customers such as carrying of receipt, no exchange at the time of sale etc which makes retail experience of customers unfavourable.

The results of customer experience are summarized in table 4.

Table 4: Respondent Experience in Organized and Unorganized Retail Sector

S. No.	Statement/Variable	Experience in Organized Retail Formats						Experience in Unorganized Retail Format					
		1 SD	2 D	3 N	4 A	5 SA	Mean	1 SD	2 D	3 N	4 A	5 SA	Mean
1. Retail Atmospherics													
1.1	Attractive window display	0	2	4	58	4	3.94	4	24	10	30	0	2.97
1.2	Pleasant background music	4	10	20	30	4	3.29	Not Applicable					
1.3	Pleasant smell	0	14	18	34	2	3.35	6	44	4	12	2	2.41
1.4	Temperature according to physical comfort	0	4	2	54	8	3.97	2	28	12	26	0	2.91
1.5	Appropriate light	0	0	2	50	16	4.21	0	4	4	52	8	3.94
1.6	Comfortable layout	0	4	2	60	2	3.88	2	32	18	16	0	2.71
1.7	Computerized billing system	0	2	0	34	32	4.41	12	32	2	18	4	2.56
1.8	Cleanliness	0	0	4	40	24	4.29	0	4	4	54	6	3.91
1.9	Ample parking facilities	0	12	8	28	20	3.82	6	34	6	18	4	2.71
1.10	Security of parking area	2	12	6	36	12	3.65	6	40	4	16	2	2.53
1.11	Good facilities(bathrooms, shopping cart, changing rooms,etc)	2	4	8	52	2	3.71	10	40	2	16	0	2.35

S. No.	Statement/Variable	Experience in Organized Retail Formats						Experience in Unorganized Retail Format					
		1 SD	2 D	3 N	4 A	5 SA	Mean	1 SD	2 D	3 N	4 A	5 SA	Mean
2. Retail Convenience													
2.1	Convenient to do one stop shopping	2	2	14	44	6	3.74	Not Applicable					
2.2	Convenient shopping hours	2	12	12	38	4	3.44	0	4	8	50	6	3.85
2.3	Convenient payment possibilities (e.g., cash, debit card, credit card).	2	0	0	42	24	4.26	14	30	4	18	2	2.47
2.4	Quick billing process	0	10	16	36	6	3.56	0	4	12	48	4	3.76
3. Retail Staff													
3.1	Professional and knowledgeable sales person	0	12	16	36	4	3.47	0	12	8	42	6	3.62
3.2	Friendly and helpful sales person	0	8	4	56	0	3.71	0	4	2	52	6	3.94
3.3	Prompt service by sales person	0	2	20	46	0	3.65	0	2	2	56	8	4.03
3.4	Personal attention given by sales person	0	18	22	28	0	3.15	0	0	8	54	6	3.97
3.5	Responsive to my complaints	0	0	16	52	0	3.76	0	6	4	52	6	3.85
3.6	Enough salesperson to assist me in shopping	2	12	14	38	2	3.38	0	12	8	44	4	3.59
4. Retail Services													
4.1	Facilities like a place to sit and water to their customers	Not Applicable						4	28	10	24	2	2.88
4.2	Good after sales service.	0	10	22	36	0	3.38	0	10	6	52	0	3.62
4.3	Change of product in case of defect	4	4	14	42	4	3.56	0	0	6	52	10	4.06
4.4	Facility of placing orders on telephone	Not Applicable						2	34	4	26	2	2.88
4.5	Service of home delivery							4	26	10	26	2	2.94
4.6	Facility of getting fund back, on the return of the products							6	20	12	30	0	2.97
4.7	Credit facility							2	14	8	40	4	3.44
5. Product Assortment/ Price													
5.1	High quality products.	0	4	4	50	10	3.97	0	2	4	58	4	3.94
5.2	Wide range of product categories	0	2	8	42	16	4.06	0	6	6	52	4	3.79
5.3	Several brands are available	6	2	6	36	18	3.85	Not Applicable					
5.4	New fashion/fresh products	0	2	14	38	14	3.94	0	6	4	56	2	3.79
5.5	Discounts and rebates	0	6	14	46	2	3.65	0	16	0	50	2	3.56
5.6	Good price-quality relationship	0	4	16	46	2	3.68	0	4	0	64	0	3.88
5.6	Various specials deals/ promotions/offers	0	2	4	58	4	3.94	Not Applicable					
5.7	Bargain options available	Not Applicable						0	32	4	30	2	3.03

Source: Primary Data

6. Conclusion:

Indian retail sector is dominated by unorganized retail sector which are run and managed by families with 92% of its share. Customer retail experience with traditional retail stores is influenced by the services and the friendly relationship maintain by salesperson of this store. Being situated in residential and nearby area of consumers these traditional stores provide convenience shopping experience. The local retailers know the preferences of their customers and give personal attention and services like credit facility, home delivery, etc which makes the first choice of customer for shopping in such stores. The bargaining aspect is a very important element which is only provided by the unorganized stores, that enhances customer experience and gives a certain level of satisfaction to them. The contemporary store managers need to modify their retail strategy by considering those factors which are the strength of traditional retail outlets. The organized retail store's strength is their store ambience and product assortment provided by them which is not present with unorganized retail stores. Traditional stores are required to include such facilities so that they can retain their customers and can compete with organized stores.

The limitation of the study is that due to dearth of time, it confined to only Jaipur city with a small sample size, hence the findings may be generalized with great caution. In this study only one factor has been considered that is retail environmental cues where as there are many other factors such as shopping motivation, situational, cultural, etc which could influence the retail experience of the customers. The data was analysed by descriptive statistics, which lacks in giving true picture of retail experience of the customers, inferential statistics can be applied with larger sample size.

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