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MALL CHOICE CRITERIA: A QUALITATIVE STUDY WITH REFERENCE TO NEW MUMBAI SHOPPERS

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ABSTRACT

Organized Retail and Mall Culture has very much arrived in India. It is expected to grow at an accelerated pace in the times to come. Along with the growth the intensity of competition is going to be significantly high. Increasing the number of 'Foot-Falls' and converting them in to shoppers will be a challenge for the management of Malls. In this backdrop, the knowledge of shopper behavior becomes pre-requisite for enhancing the probability of success. Precise knowledge of the parameters considered by the shoppers while choosing a mall out of alternatives can go a long way in guiding the marketing decisions. The present research paper aims at identifying those factors which influence shoppers' mall choice at New Mumbai. Using FGD technique prominent factors have been identified. Based on this understanding certain broad recommendations are also made.

KEYWORDS

Retail, Malls, Shoppers Choice Criteria, FGD, Qualitative Research.

INTRODUCTION

Organized retailing in India witnessed a gross turnover of USD 320 billion¹ in 2006. Although this figure is low compared with other developed economies, industry experts expect the growth rate of this sector at 35% until 2010. At present, about 100 malls are operational at a Pan-India level with a total area of 19 million sq ft. As per the current estimates, about 300 additional malls are expected to be constructed across the country by 2010. As organized retail grows, we expect the market to be more competitive by providing more choices to consumers and retailers. At this point, developers will have to work harder to create a differentiation for their product. We believe consumers and retailers will be attracted to malls that are professionally managed, making effective mall management a critical factor behind the success of a mall.

The partial foreign direct investment (FDI) relaxation in 2006 allowed 51% ownership in joint ventures by single-brand companies in the retail market. This triggered high international single-brand retailer interest in the Indian retail market. Additionally, large Indian conglomerates such as Reliance Industries and Aditya Birla Group are commencing their foray into retailing across the country. This prompts the Indian retail industry to undoubtedly move on a high growth curve. However, at this juncture, retailing is still faced with one major challenge: systematic mall management. Currently, there are very few designated mall management companies in India. However, big retail chains such as Future Group and some large developers have set up their own mall management divisions that operate as their subsidiary companies. Some developers such as DLF have also recently entered into contractual arrangements with international property consultancy firms to manage their malls. Historically, developers were managing their malls in-house, which are expected to change going forward. (Debarpita Roy, Nitika Masih, 2007)

The retail format that has shown maximum growth among all is the multipurpose shopping complexes or shopping malls. Spencer Plaza in Chennai and Crossroads in Mumbai are considered to have pioneered the shopping mall in its modern format. The pace of development has been fast since then. Mall development is expected to grow at a frantic pace in metros and mini metros driven by the organized retail sector and spread to 60 cities by the end of this decade. For the Indian mass affluent, the call of the mall is proving irresistible. The packed parking lots, busy food courts and restaurants, crowded anchor stores and noisy gaming arcades at the malls bear testimony to this alluring call. The secret of the lure of the mall lies in its mass appeal—it has something on offer for everyone in the family. The fact that a mall offers experience and not just goods is a major attraction. There is a wide range of shopping experiences—bargains and discounts or high-end brands for couples, gaming and other amusement facilities for kids, a large choice of cuisines for family meals, and, of course, the multiplex theatres.

Since organized retail is in its nascent stage, mall management is mostly learning through trial and error. "Build them and they will come", is the attitude towards consumers currently. Much to their dismay, malls are finding that shoppers are spending lot of time and not money at the malls. People visit cafes, spend the whole day here and pass their time. The malls are always crowded but most of the people come for window shopping and not actual shopping. When the promised footfall and conversions do not materialize, then the relationship between the retailer and the mall management sours. With more and more malls dotting the urban landscape, it is now becoming essential to study consumer behavior and differentiate the offerings. (Shelja Jose Kuruvilla and Nishank Joshi, 2010)

MALLS IN NAVI MUMBAI

Navi Mumbai is the world's largest planned city. It was initially planned with a specific purpose: to decongest Mumbai and become an alternative haven for the multitudes that throng to Mumbai from all over India. As of the 2001 India census, Navi Mumbai had a population of 703,947 which is projected in 2011 census data as 1,268,784. Males constitute 56% of the population and females 44%. Navi Mumbai has an average literacy rate of 74%, higher than the national average of 59.5%: male literacy is 79%, and female literacy is 67%. In Navi Mumbai, 14% of the population is under 6 years of age, with 28% in the age group of up to 15 years, 55% in the age group of 15-44 year bracket and 13% aged 45-59. Average family size is 4.05 persons, compared to Mumbai's average of 4.85. 67% of families living in Navi Mumbai own their homes and of the working population, 63.5% are employed within the city.

With so many malls, mega-marts and retail stores in our city, and more to open up soon, the scene definitely looks good for the die-hard shoppers and window shoppers. Malls in the city are seeing a rise in footfalls during the last few months, global recession notwithstanding. There are so many high-end shops in the malls in Navi Mumbai that there is no need to go to Mumbai now, as almost all premium brands are available right here. Malls in the city are quite big and are a hangout for the youth of the city. Big Bazaar, gift shops like Archies and Karigar, music and book stores like Planet M and Crossword, various apparel stores are just too good for the consumer who has become king," says Snehal Bangad, a collegian from Belapur. Center One, Vashi, opened up first followed by others like Palm Beach Galleria, Raghuleela, City Center and now Inorbit. With five malls, Vashi has become a shoppers' paradise. One can also head to one of the multiplexes in the city, within the malls.

Not just the customers, even the managements running these malls are positive about the long term impact of malls on the city and its consumerist culture. This satellite township has been witnessing a rapidly changing retail landscape and is on the brink of a retail revolution. With the launch of world-renowned stores

across malls in Navi Mumbai, there has not only been a rise in footfalls here but also a boost in shopping of popular labels, amongst the shoppers. This eventually is helping malls like Inorbit to bring home to their shoppers famous sought-after brands.

It is the shopping experience that people love here. Not everybody is necessarily looking for discounts and do not mind spending a few extra bucks. Besides, the growing population of expats in the city is adding to the changing profile of this city's consumer. Right now, due to the ripple effect of the global meltdown, a major chunk of customers are the loyal ones. However, recession is a temporary phase. The mall owners are sure that they will again start getting customers in huge numbers. The future of malls and the mall culture in this city seems fantastic.

Some people attach special feelings with these concrete and glass structures, too. Customers and young couples, who spend a lot of time at the mall, consider it just like their home. They are very comfortable here and often hang out with their loved ones. It seems mall culture has already become a big factor in this city. Celebs are also adding to the glam quotient of these hip "Masti, Bunty Aur Babli, Saas, Bahu Aur Sensex, Mumbai Meri Jaan" were the other movies with certain scenes shot at Center One mall. Shatrughan Sinha aka Shotgun, Rekha and Satish Shah recently shot a few scenes of their new movie here. The ambience is what they like at our mall. (Sharma, 2008)

CHALLENGES

Earlier in the decade, mall developers were more inclined towards exiting the project early by selling retail mall units to investors at the pre-completion and post-completion stages and booked profits. As the ownership of individual retail spaces were with different entities, there was no central authority managing the malls. There was no control over the various facets of mall management mentioned earlier in the paper. Even though there have been some examples of professionally managed malls in recent years, organised retail in Indian malls have a long way to go to achieve optimum mall management. The current Indian scenario is plagued by various issues, some of which are discussed below.

- Lack of Feasibility/Market Research Prior to the Development of a Mall – In the past, some malls were constructed without carrying out a rigorous due diligence exercise on their feasibility. The market scene is gradually changing wherein more and more developers are approaching property consultancy firms to conduct feasibility and positioning studies for their projects.
- Zoning – Landlords/developers tend to lease out retail space on a first-come-first-served basis. This creates a sub-optimal tenant mix like a food and beverage outlet next to a designer apparel shop instead of an accessories or a footwear shop.
- Design Issues – At present, most of the popular malls have long queues and congestion outside their main entry points during weekends and festive seasons. Having only one entry and exit points also leads to overcrowding. Similarly, the visibility of retail units from all vantage points is poor in many malls.
- Few Promotional Activities – There are very few promotional activities organised in the majority of malls at present. Developers perceive that these events only help increase foot traffic and not revenues.
- Facility Management – Good infrastructure/facility management of common areas becomes a problem in malls where retail outlets are sold as strata title.
- Parking – Many malls in India do not have adequate parking. Since most malls are being built in the city, developers typically provide basement parking facilities. However, these parking spaces are inefficient due to low ceiling heights, bad lighting and single entry and exit points. (Banga, 2010)

The coming year will have a lot of consolidation. The existing smaller or vacant malls will either be converted into commercials or will be acquired by the larger players. The commercialization strategy will improve as the developers have seen enough and have learned to reject the worst and select the best. The tagline "everybody is welcome" will no longer be entertained and the landlords will be more selective in case of tenant mix and assigning locations.

To assimilate the above, complete and professional asset management services are required to assist the developers and to create a good balance between the customers, retailers and the owners. It is possible by correct succession of steps beginning from thorough market research till the designing of the property. Considering the fact that Indian real estate market has high potential and long way to go; the current phase demands improvisation through professional consultancy and other allied services. It is the time to see how owners employ the best use of these services in future. And if all this is incorporated, one can hope that Indian Malls can once again be on a *path of glory*.

PROBLEM DISCUSSION

Retail in India is passing through an interesting phase. On one hand there are promising projections of future growth, and on the other hand the landscape is becoming more and more competitive. Some malls do have large number of foot falls, but those foot falls are not getting converted to shoppers. What is true at the national level is true of Navi Mumbai market as well.

The million dollar question on the top of the mind of mall management is 'How to make the shoppers to get attracted?' Related question is 'What factors influence the customers while choosing the mall for shopping?'

RESEARCH OBJECTIVE

The foremost objective of the research is to ascertain the Antecedents of consumers' mall choice in the conglomerate locality.

LITERATURE REVIEW

Early researchers on mall patronage developed gravitational models to predict patronage for shopping areas using a combination of objective measures, such as distance, population density and mass (square footage of retail space)(Brunner and Mason, 1968; Huff, 1963; Bucklin, 1967).

Huff (1964) and Huff and Rust (1984) retail gravity model, provides a formula for predicting mall patronage based on the principle of cost (accessibility) verses utility (size).

Later studies focused on subjective factors such as image attributes and consumers' shopping motives (Bellenger et al., 1977; Gentry and Burns, 1977–8; Nevin and Houston, 1980; Finn and Louviere, 1996; Stoltman, 1991).

Wakefield and Baker(1998) examined the relationship between three factors—tenant variety, mall environment and shopping involvement, on shoppers excitement and desire to stay at the mall in the effort to understand antecedents and consequences of excitement at the mall.

Shopping mall attributes determine the shoppers' attitude to malls. Shim and Eastlick (1998) defined mall shopping attitude as the shoppers attitude towards a variety of dimensions including location, variety of stores, parking, mall employee behavior, price, quality, customer service, promotional activities, ambiance, mall amenities, food and refreshments and safety.

Malls are viewed as cultural and entertainment centers (Robertson, 1995; Rintamaeki et al., 2006). They help retailers satisfy the utilitarian and emotional needs of the consumers (Holbrook and Hirschman, 1982; Bloch et al., 1994; Buss, 1997; Wakefield and Baker, 1998; Arnold and Reynolds, 2003)

Over the past few years researchers have examined mall ambience, store factors, and facilities that contribute to mall patronage and attractions (Howell and Rogers, 1980; Finn and Louviere, 1990; Finn and Louviere, 1996; Swait and Sweeney, 2000; Darian et al., 2001; Yavas, 2003; De Juan, 2004).

Paper looks at the mall attributes that influence consumer behavior which were identified by Bloch et al. (1994). They are categorized as follows:

1. Aesthetics: Belk (1975) concludes that physical and social surroundings of shopping centers are important attributes affecting shopping behavior. The variables such as locations, de' cor, noise, aromas, lighting intensity, physical layout, and presence of other shoppers in a shopping environment influence consumer's shopping behavior.
2. Escape: Shoppers seek respite from their daily routines in the malls. The mall environment provides positive cues which have an impact on the consumers' moods (Bittner, 1992; Michon et al., 2008; Ghee and Ahmad, 2010).
3. Flow: Mall patronage motives are also influenced by variety, entertainment, social, leisure, fashion, convenience, and relaxation (Haynes and Talpade, 1996).
4. Exploration: Wakefield and Baker (1998) suggest that variety of shops in malls generate positive effect and excitement.

5. Role enactment: Tauber (1972) states, "Many activities are learned behaviors, traditionally expected or accepted as part of ascertain position or role in society like—mother, housewife, husband, or student. A person internalizes the behaviors as "required" and is motivated to participate in the expected activities".
6. Social: Malls facilitate social interaction (Kelly, 1983).
7. Convenience: Research also suggests that convenience has the largest impact on the shopping center choices (Bearden, 1977)

METHODOLOGY

This Qualitative study was carried out to explore the antecedents of Shoppers' Mall choice. The methodology included Secondary Research and Series of Focused Group Discussion (FGD).

FOCUSSED GROUP DISCUSSION (FGD)

Focused Group Discussions were conducted amongst the potential shoppers belonging to upper middle class. The respondents were chosen keeping in mind that they fall under the category of our target audience, i.e., having residence in Navi Mumbai and are from either SEC A or B. The main objective of conducting these group discussions was to understand the consumer behavior towards the malls in Navi Mumbai and also their expectations from the malls as a product or service mix.

PARAMETER DEFINITION

The parameters/attributes of interest in FGDs were as follows:

1. Location: EXTERNAL FACTOR

Refers to the area in which the mall is placed. It takes into consideration the distance from the station [train/ bus], basically the accessibility of the mall. Also it takes into consideration the locale.

2. Ambience: EXTERNAL FACTOR

Refers to the environment of a mall. It includes the layout, the flooring, the décor, the overall furnishing and other small factors such as cleanliness etc which build up the atmosphere inside a mall. It is basically the overall feel of the mall.

3. Shopping area: EXTERNAL FACTOR

It refers to the size of the mall. Sometimes also called as floor space, this parameter directly associates with the capacity of the mall.

4. Parking space: EXTERNAL FACTOR

It refers to the availability of parking facilities for vehicles in and around the mall.

5. Events: FUNCTIONAL FACTOR

This refers to the various programs and entertainment events which are organized inside the malls.

6. Food courts/restaurants: FUNCTIONAL FACTOR

This refers to the sum of all the food retail shops, chains, cafés, ice cream parlors etc which are present inside the mall.

7. Brands: FUNCTIONAL FACTOR

This refers to all the product outlets as well as services which are present in the mall.

8. Kids zone: FUNCTIONAL FACTOR

This refers to the gaming parlors as well as special counters where young people can have some fun.

9. Multiplexes: FUNCTIONAL FACTOR

Refers to the movie hubs present in the mall.

10. Shopping: FUNCTIONAL FACTOR

Excludes purchase of daily need products i.e. FMCG products and includes apparel, electronic items etc.

11. Hanging out: FUNCTIONAL FACTOR

When consumers go to a mall with the sole purpose of spending time with their friends, family, spouse or even alone, then it is called "hanging out".

12. Window shopping: FUNCTIONAL FACTOR

When consumers go to a mall with the intention of not buying anything but just to acquire information or to evaluate alternatives then it is called window shopping.

13. One stop shop: FUNCTIONAL FACTOR

Refers to the characteristic of the mall i.e. the consumer can avail most of his needs in a single shop.

14. Discount offers: FUNCTIONAL FACTOR

Refers to the discounts and offers which are given to a consumer when they go to a particular mall.

15. Daily need products: FUNCTIONAL FACTOR

It refers to the need of purchase of FMCG product from a mall.

FINDINGS, DISCUSSIONS AND IMPLICATIONS

The following are the inputs we got from our respondents which were divided into clusters according to their profile and responses

CLUSTER -1

Age: 40-45 yrs

Residence: Kharghar

For them the most important parameter of going to the mall was location followed by ambience, brands and food courts. They prefer going to the malls with her family on weekends. Since their children are grown-up, events and gaming zone aren't much important to and they go to the malls for buying groceries, footwear, clothes and to hang out at the food court.

CLUSTER-2

Age: 35-40yrs

Residence: Seawoods, Nerul

The most important aspect for them to go to the mall is the fun part. She loves going to the mall with their family every weekends and they do shopping of groceries, footwear, gift items, clothing and also takes her children to the gaming zone and multiplex. For them brands and parking space are the two important criteria before choosing any mall and they prefer taking their relatives to the malls who visit her place.

CLUSTER-3

Age: 25-30 yrs

Residence: Dombivili

For them, the first thing she expects from a mall is the ambience and they prefer going to the mall with their family where they can get bigger shopping area and a good food court and they visit the malls for watching movies and shopping for clothes and groceries.

CLUSTER-4

Age: 30-35 yrs

Residence: Kharghar

No. of children: Nil

they love to go to the mall for hanging out with their friends and for them food court is the first priority followed by multiplex and shopping of clothes and footwear and they also like doing window shopping with his friends.

CLUSTER-5

Age: 25-30 yrs
 Residence: Kharghar
 No. of children: nil

For them the mall should be a One Stop Shop, they prefer everything should be available under one umbrella. They prefer going to the mall with their family and spend time at the food court. Does their complete shopping for the mall and also visits the multiplex.

CLUSTER-6

Age: 25-30 yrs
 Residence: Kamboli
 No. of children: nil

The first thing they look in while visiting any mall is the brands available there and they visit the malls during weekends along with his family and they spend their day shopping for clothes, footwear, watching movies and also eating at the food court.

CLUSTER-7

Age: 40-45 yrs
 Residence: Vashi

They love going to the mall with their family every weekend. Since, their children are grown-up, for them gaming zone and events aren't much important. The foremost criteria for them while choosing any mall is the ambience. They are also particular about the brands available in the mall and also the food court.

From this discussion, we could conclude that according to all the respondents a mall should be a One Stop Shop where they can spend their entire day with their family. It should have the proper ambience, food court, brands and a multiplex. Events are not something for which somebody visits malls but they definitely are crowd-pullers. According to all the respondents, Inorbit is the best mall in Navi Mumbai catering to all their needs.

CONCLUSION

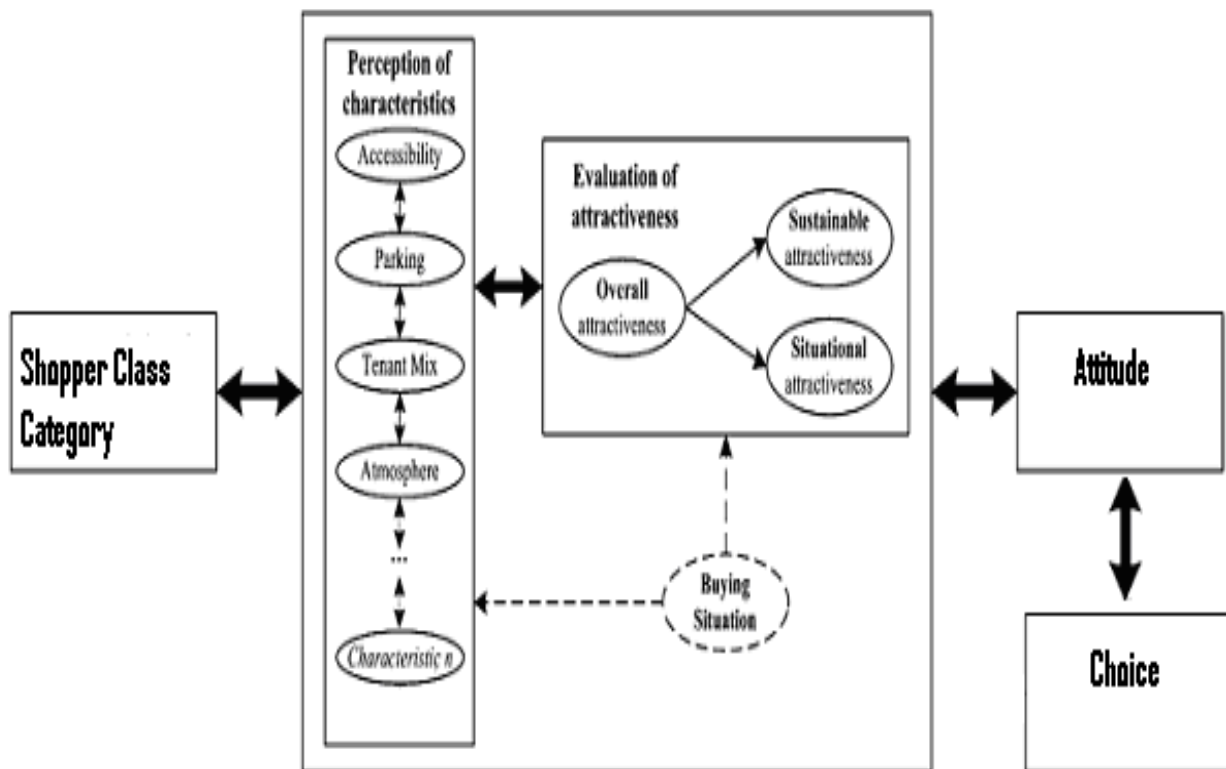
Predicting the consumer behavior for a particular service or a product is very important in any industry. This gives us the trend and the perception that consumer has about a particular service or a product.

The conclusions we were able to ascertain from the research were as follows:

1. There exists a marked difference in the behavior of various classes, their purchasing pattern and their attitude towards various functional as well as non functional parameters.
2. Location and restaurants are by far the most important parameters on which a consumer chooses which mall to go in.
3. Events and Gaming zones have no importance whatsoever but are definitely the future prospects for the mall industry.
4. Ambience, parking space, shopping area and brands play equal importance for the general mass, although they are important for all of them.
5. The time spending pattern for most of the people is not much which means that malls are still not in the mature stage.
6. The visiting patterns are confined to weekends except for the student segment and hence there is a need to position malls in the minds of the consumer as a place for relaxation not only shopping.
7. People usually go to malls with their family or friends and hence this is the way to promote them i.e. as a place of fun, excitement etc.
8. Recreational factors are of major importance along with shopping for the consumers.
9. The purchasing pattern of the consumers inside the malls is limited to apparel.

Based on the inputs from the FGD Participants and detailed review of literature, following model is proposed:

FIGURE 1: ANTECEDENTS OF SHOPPERS' MALL CHOICE



SUGGESTIONS

- A good ambience is a must for any mall anywhere because this can be used as the biggest differentiating factor.
- When setting up a mall it is preferable for us to have a large and comfortable shopping area.
- If we have to place a mall specifically for Class A and Class B then we have to make sure that we provide the service of parking.
- Events are one area in which we have a potential to grow and differentiate. This can be a new way to promote a mall by associating malls through this variable.
- Gaming and Kids zone is very potential in future prospects.
- We can start a setup where we can provide services as to take care of children [little] when the parents are shopping with trained professional. This has worked very well in foreign and may work out in India as well.

SCOPE FOR FUTURE RESEARCH

As Research was primarily focus on Satellite area of Navi Mumbai and researcher have tried to understand and ascertain the importance of factors with respect to the local market. Similar sort of research can be highlighted in different parts of country and mostly in the upcoming area. Mall Management requires lots of consumer decision making interfaces. Research can be conducted to explore those intangible variables and to present that in a more empirical manner. Quantitative Research can be carried out to ascertain the strength of each of the dimensions identified.

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