Consumer Perception towards Modern and Traditional Retailers and Impact of Modern Retailers on Traditional Retailers

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Abstract— Marketing can be defined as a strategy for identifying the customers, satisfying the customers and keeping the customers for long time. Retail sale is the final proof of a product ensuring the success of a product by properly promoting and presenting the product to the final consumer. The retailing environment in India has seen a tremendous growth in the size with market dominance of the large organised players and increased retail concentration. India tops in the list of emerging market for organised retailer since its organised retailing is expanding and modernizing rapidly in line with India's economic growth, liberating government regulation, increasing number of double income family, changing lifestyles and facilitating some attracting consumer services. But the organised retailing impacts turnover, sales and profit of traditional retailing badly. Therefore some types of initiatives, creativity and new strategy are required for future existence the researcher wants to study consumer preferences towards both types of retailers and impact of organised retailing on traditional retailing and provide some measures for future existence traditional retailing.

Keywords: Organised Retailing, Traditional Retailing, Consumer Perception, Consumer Preferences

I. INTRODUCTION

Marketing is the process through which the products or services which may be of interest to the customers and the strategies to use in sales, communication and business development are determined. It creates sales techniques, business communication and business development strategy. It is an integrated process through which business creates value for their customers and for themselves by building strong customer relationship. Marketing can also be defined as a strategy for identifying the customers, satisfying the customers and keeping the customers for long time. A retailer can ensure the success of a product by properly promoting and presenting the product to the final consumer. Retail sale is the final proof of a product. The product could be properly conceived, excellently designed, efficiently manufactured and effectively distributed, but if it is rejected by the final consumer, all the upstream activities will become a waste. Therefore retailing is as important as manufacturing.

Retailing is one of the biggest sectors which has witnessed multifold growth in the post liberalization of the Indian Economy (Care Rating 2017). The retailing environment has seen a tremendous growth in the size and market dominance of the large players, with greater store size, increased retail concentration and utilization of a range of format (Hollingsworth, 2004).

India which is the second fastest growing economy in the world is the fourth largest economy in terms of purchasing power parity. India presents a huge opportunity to the world at all ages, to use it as a hub. India is all set to experience the phenomenon of global village due to retail revolution and witnessing a fast changing retail landscape. India is the "Promised land" for global brands. India tops in the list of emerging market for global retailer and India's retail sector is expanding and modernizing rapidly in line with India's Economic growth. The future is promising; the market is growing, government policies are becoming favorable and emerging technologies are facilitating operations.

A. Division of Retail Sector into Oragnised & Unorganised Sector

The retail sector structure in India may be divided into two parts
1) Unorganized retailing
2) Organized retailing.

Unorganized retailing is that which is operating under traditional formats of low cost retailing and normally not registered for sales tax, income tax, etc. These are mainly family-run business employing very few personnel for example local kirana shops, local mom and pop stores, street vendors, convenience stores, etc. in the locality.

Organized retailing are those which are operating their retailing activities taking license from the Government and registered for sales tax, income tax, etc. These include the corporate backed supermarkets, hypermarkets and retail chains, and privately owned large retail business.

B. Evolution & Drives for the Growth of Organised Retail Sector in India

India is largely a rural country with less than one third of the population in urban areas. Yet there are several large cities with concentrations of middle-class consumers. This country is also a very young country combined with a rising middle class, anticipates well for the development of modern retail distribution. The middle class increasingly involves two-income couples with less time for shopping than in the past implying that the traditional daily shopping is becoming more problematic. This has created a favourable environment for the growth of organised retailer. In today's competitive retail environment, high GDP growth, the expansion of consumer credit availability by the banks, the delivery of high service quality with increased consumerism and liberalization of manufacturing sector, India is being portrayed as an attractive destination for FDI.

According to a study conducted by ICRIER, total retail business in India will grow at 13% annually. Indian Retailing is the largest private sector in India comprising 14 to 15% of the country's GDP. It contributes 8% of the total employment. Indian retail sector is highly fragmented with 96% of the market being dominated by unorganized retailers. Regarding long-term demand, if India's GDP grows at an average annual rate of even 7% per annum for the next twenty years, retail sector will multiply by a factor of about four by 2030. If retailing accounts for even 30% of GDP, the increase in retail sales between 2010 and 2030 will exceed a trillion dollars. This is far too large to be

accommodated entirely by unorganized retailers or to be left alone with no significant effort to improve the productivity and efficiency of the distribution and retailing system in India (Kohli and Bhagawati, Organised retailing In India, issues and outlook 2011). The wide range of products, high quality and value for money are provided by organized retailers which encourage the consumers through various advertisement strategies and it also creates memorable shopping experience. Organized retailing has made a considerable progress in product like food, groceries, clothing, books and music. Food & groceries segment has undergone transformation with super market chain like Food world, Nilgiris, Subhiksha, future groups, ITC Choupal, Apana Bazaar etc. The factors such as demanding convenience in shopping, increasing the number of working women and making the shopping experience enjoyable contribute rapid growth in sales of super market, department stores and hyper market. It reflects that Indian retail sector has modernized to greater extent. Presently, Indian organized retail constitutes 8 per cent of the total retail market and it is growing much faster than traditional retail. It is expected to gain a higher share in the growing pie of the retail market in India. Various estimates show that organized retail contributes 20 per cent by 2020 (Deloitte, 2013). The recent wave of reforms by the Government to incentivize Foreign Direct Investment (FDI) in various sectors is bringing a new zeal to the investment climate in India. After implementation of new reform, the organized, multi outlet retailing concept had gained importance in India.

C. Strong Growth in the Indian Retail Industry

The increasing growth of retail sector can be shown with the help of following diagram:
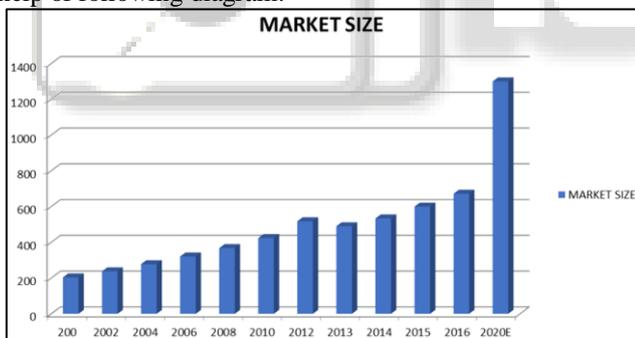

Fig. 1:

Note: CAGR - Compound Annual Growth Rate, E - Estimated
Source: BCG Retail 2020, Ernst and Young, Deloitte, indiaretailing.com, Economist Intelligence Unit, Euro monitor

The retail sector in India is emerging as one of the largest sectors in the economy. From the above diagram it is indicated that the total market size was estimated to be around US$ 672 billion in 2016, thereby registering a CAGR of 7.74 per cent since 2000. And it is expected to grow to US$ 1.3 trillion by 2020. The Indian Brand Equity Foundation (IBEF) estimates the industry to grow at a CAGR of over 17% over the next 4 years and reach USD 1,300 billion by 2020.

1) Segment-Wise Contribution in Retail Industry

CARE expects that the retail industry will grow at rate of about 12-14% over the next 4 years and reach about USD 1,150 billion by 2020. Apparel and accessories constitute the majority share of the organized retail market. Apparel retail has a strong organized presence. After the first round of changes in the FDI policy for single-brand retail in 2006, retailers ventured into the market with EBOs across categories such as footwear, personal products, food services and entertainment, thus making this format a popular choice in the Indian organized retail market. This industry is expected to register strongest growth with transition from offline stores to online stores and also with home delivery, cash on delivery options.

Sectors such as food and grocery, apparel, electronics, e-commerce, fashion and lifestyle are some of the emerging sectors of the retail industry. In the past few years, retail players are integrating technology such as the computer, inventory control, internal store billing, bar coding, etc into business. By 2020, food and grocery segment is expected to account for 66 per cent of the total revenues in the retail sector, followed by apparel segment. Demand for Western outfits and readymade garments has been growing at 40–45 per cent annually. After 2017 being a favourable year for herbal-ayurvedic brands, new Indian organic labels in hair care, cosmetics, food and apparel are gearing up to establish an organic niche in the growing herbal segment.
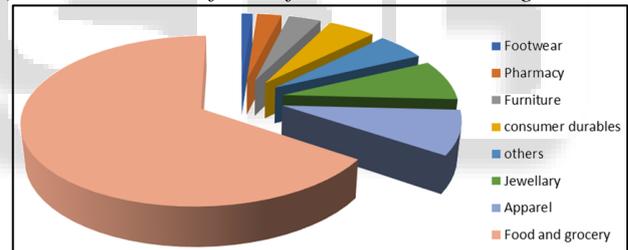
2) Revenue share of India from various retail segments

Fig. 2:

Note: E – estimate
Source: Technopak, Indian Retail Market January 2013, Deloitte, A Report on 'Changing trends: gems and jewellery industry' by Onicra

D. Organised Retailing & Its Impact on Traditional Retailer

From the data and fact provided by the Indian Council for Research on International Economic Relations, it is indicated that the employment, turnover, profit of traditional retailers are declining with entry of organized retailing in retail landscape. The data provided by ICIRIER are as follows:

1) Unorganized retailers in the vicinity of organized retailers experienced a decline in their volume of business and profit in the initial years after the entry of large organized retailers.
2) The adverse impact on sales and profit weakens over time.
3) There was no evidence of a decline in overall employment in the unorganized sector as a result of the entry of organized retailers.

4) There is some decline in employment in the North and West regions which, however, also weakens over time.

5) The rate of closure of unorganized retail shops in gross terms is found to be 4.2 per cent per annum which is much lower than the international rate of closure of small businesses.

6) The rate of closure on account of competition from organized retail is lower still at 1.7 per cent per annum.

7) There is competitive response from traditional retailers through improved business practices and technology upgradation.

8) However, only 12 per cent of unorganized retailers have access to institutional credit and 37 per cent felt the need for better access to commercial bank credit.

9) Most unorganized retailers are committed to remaining independent and barely 10 per cent preferred to become franchisees of organized retailers.
(Source: Impact of Organised Retailing on The Unorganised Sector: Joseph Mathew, Soundarajan,Gupta and Sahu, Sept 2008)

II. REVIEW OF LITERATURE

1) Smith V G in his thesis" Impact of Organised Retailing on Unorganised retailier; A study on buying behaviour of consumer at food and general stores in Vishakhapatanam" (2011) studied the present retail scenario and analyzed various factors influencing preferences of retail outlet and buying behaviour of consumer. By studying the consumer behavior he observed that majority of respondents belonging to 20-29 ages visited organised outlet thrice a month and older generation preferred traditional retailing.The strong feature of Unorganized retailer are providing cash credit and home delivery. The influencing factors of buying pattern are price, location, service, distance amount of purchase and their personal characteristics.

2) But Dinar Fatima (2015) focuses on analyzing the key trend that impacts the retail sector and drivers responsible for growth of organised retailing. By studying he emphasized the factors such as rising personal disposable income and purchasing power, real estate development, changing consumer mindset, shelf display, cleanliness, shopping environment, parking facility brand consciousness, convenience of one shop, easy consumer credit, etc for the growth of organised retailer. The food, jewellery, customer electronics accounts 80% of Organised retailing market. He also focused the challenges faced by this retailer such as lack of techonolgy, retail shrinkage, understanding the customers etc. It is seen that unorganised Retailing in the environment of organized retailing experienced a decline in their volume of business and profit due to change in consumer attittude and life style.

3) The thesis by R. Sorna Priya (2013) examined the impact of organised retailers on Unorganised Retailers in different way, He tried to assess the impact of Organised retailers on procurement, turnover, profit, pattern, pricing, sales and diversification strategies adopted by small traders and exhibited the problems and opportunities received by small traders from the entry of OR of three cities of Tamil Nadu. The most important motivating factor among the small traders is ambition which consist of five variables.The business expansion of unorganised retailing were also affected badly. The scope of sustenance by small traders become very difficult due to competition and challenge by emerging retail trade. Mass consumption, high money supply and market potential are ranked as most influencing factors for entry of organized retailing.

4) Rajkumar P (2014) in his thesis emphasized on the factors influencing customers for shifting to Organised Retailers and its impact of organised retailer on unorganisd sector, wholesalers, commission agent and also on farmers. By studying its impact of on various sectors it is seen that consumers have definitely gained on multiple counts due to saving through organized retailing purchase. There are major drivers for choosing a traditional retailers nearness to place of residence and comfort level. The traditional retailers in the vicinity of organized retailing have experienced a decline in their volume of business which leads to closure of traditional retailer and their sales and profit weaken overtime. Now there is a competitive response from traditional through improved business practice.

5) The article by Sudeep Chandramana (2016) explores the factors influencing the perception towards organised retailing from unorganised retailing. From this study we get to know that proximity is a major comparative advantage of unoraganised outlets in rural areas. The consumer preference towards organised and unorganised retailer differ on the basis of quality and price. Though a gap exists between two types of retailing due to enormous growth opportunities and facilities provided by modern retailer it might not create a major impact on the unorganized retailers due to unchanging mindset of the consumers.

6) Shaikh *et* al. (2012) noticed that brand has a specific impact on consumer psychology. The rating of a brand name of the supermarket is a compelling force in buying decision and it has co-occurrence with marital status, qualification, gender and occupation of respondents. Quality is a fundamental point to justify the purchase of a particular product.

7) From the detail study made by Prasad and Aryasri (2011) it is stated that shoppers' age, gender, monthly household income, distance travelled to store, occupation, family size and education have a significant relation with retail format choice decisions. From the findings it is noticed that shoppers' psychographic dimensions such as shopping orientations, lifestyle factors and values result in the segmentation of grocery and food retail consumers into autonomous, hedonic, conventional, socialisation and utilitarian type.

8) Rao and Manikyam (2012) gave the customers' perceptions of the experience related to four areas which are: shopping experience, buying experience, service experience and relationship experience and also established the fact that the small scale retailers are providing valued experiences to the customers. The customer experience management requires the efforts of

the management for improvements qualitatively and organised efforts of retailers.

III. OBJECTIVES

− To assess the impact of modern retail sector on operation of traditional retail sector.
− To determine the consumer perception towards modern and traditional retail sector

IV. SIGNIFICANCE OF THE STUDY

North East region is now catching up with rest of the country in terms of organised retail trade.

The present study focuses on the growing popularity of modern Retailing in the Assam region, its impact on the traditional retail sector and the society at large. With escalating consumerism, unprecedented awareness, liberalization of economy in the form of relaxation of FDI norms on various sectors and a youth customer base, India is the 'promised land' for global brands and Indian retailers. Among the North-Eastern states, Guwahati of Assam has been offering great opportunities for improvement of the modern retailers. Moreover the success of companies like Future group with their brands like-Pantaloons and Big Bazaar, it is evident of the fact that the people of this region are now becoming brand conscious sending welcome signals to the organised retailers.

Success of every business organisation depends on their ability to create and retain customers by providing good Quality Service. The present research will help to portray a detailed picture of consumer preferences towards emerging retail formats.

But one aspect is pointed that the future of small traders looks uncertain due to the growth of modern organized retail expecting that small traders will soon be extinct from business. Thus, there is a great need to promote and protect small traders in the study area. Hence, this is also included in the study to see to what extent the organized retail impacts the unoganised retail sector and derive some useful strategies for traditional retailers.

V. RESEARCH METHODOLOGY

The purposive sampling procedure has been adopted to identify the sample retailers included in the present study. The total sample size of traditional retailers is 100. Hence the considered retailers for the present study in four areas of city with 25 retailers each. The criteria of the sampling plan undertaken are as follows.

1) Target Population or Universe: Unorganized retail
2) Business selected: Grocery shop, Petty shop, Fruit vendor, and Vegetable Shop.
3) Sampling Method: Purposive Sampling technique
4) Sample Size: 100
5) Area of Survey: Fancybazar, Dispur, Paltanbazar Adabari.
6) A consumer survey was conducted through exit interviews of 100 consumers, shopping in modern and the traditional retail outlets.

VI. ANALYSIS & DISCUSSION

The traditional sector is seemed to decline fastest in large cities and among small general stores; they tend to have trouble competing with the emergence of big retailers in the form of reduction of customers, sales and profit due to price pressure. There is also reduction of employment capacity of traditional retailers due to reduction of its sales and its profits. Declines are slower among urban traditional retailers who modernize to compete (Reardon et al, (2008). So this research wants to study the impact of organized retailer on unorganized retailers. The success of any format of retail industry solely depends on how efficiently the modern retailers persuade the consumers in to its basket through understanding the behavior of the consumers. But understanding the consumer behaviour is very complex, as it is related to the psychology of consumers and also depends on various social phenomenon. Thus, the consumer's buying behaviour becomes an integral part of the marketing strategies of the organized retail stores. In this context, it is imperative to study the consumers' buying behaviour towards organized retail stores.

First the analysis of the impact of Organized Retailing on unorganized Retailing is given below:

A. The Growing Organized Retail is Threat to Traditional Retail Business

With the establishment of modern retailing, the turnover and profit of traditional retailing is reduced to some extent which can be indicated from this survey. So it is indicated that the modern retailers is becoming threat to traditional retailers.

B. Employment Impact

The sampled traditional retail outlets employ more family labour than hired labour; on an average they employ 1.4 persons per shop from the family, and hired employees of 1 person. The survey finds that since sales and profit are falling in traditional retail decrease in overall employment for these outlets over the period of existence of the sampled modern retail outlets.

C. Impact on Turnover and Profit

The survey has brought out that there has been an adverse impact on turnover and profit of the traditional retail sector after the opening of modern outlets. The overall impact has been a decline in turnover of about 11 per cent and in profit of about 3, 5 per cent over the period, after opening of organized retailers from an average of 2.5 years.

1) Impact on Turnover of Traditional Retailing

Sample Size	Average Age of modern Outlets (years)	Annual Growth in Turnover (%) of traditional retailer before establishment of organized retail	Annual Growth in Turnover of traditional (%)after establishment of organized retail
100	2.5	11	6

Table 1:

2) Impact on Profit of Unorganized Retailing

Sample Size	Average Age of modern Outlets	Annual Growth in profit(%) of traditional retailers before	Annual Growth in profit(%) in traditional after establishment of

	(years)	establishment of organized retailing	organized retailing
100	2.5	6.5	3.7

Table 2:

D. Closure of Traditional Outlets

It is interesting to know whether the presence of organized retail has led to the closure of traditional outlets. The retailers stated that though the sales, profit and employment of traditional retailers are declining but most of them (90 percent) do not close their shops due to presence of some loyal customers and nearness to home and cash credit facility.

VII. RESPONSE TO MODERN RETAILING

A total of 100 such outlets were reported to have been closed down over an average period of 2.5 years, which constituted about 5.2 per cent annualized closure of retailers. Survey states that traditional retailers have indicated a number of steps taken in response to competition from organized retail such as adding new product lines and brands, better display, renovation of the store, introduction of self service, enhanced home delivery, more credit sales, acceptance of credit cards, etc.

Various strategy provided by traditional retailing	Percent of response modern retailers
Response to Competition Reduced prices	43
Reduced expenses	30
Added new product lines	78
Discontinued some product lines	56
Increased number of brands	81
Better display	94
Introduced self-service	87
Improved home delivery	67
Increased store space	79

Table 3:

Thus from the above table it is seen that the unorganized retail sector is trying to make various strategies to compete the organized retail sector and make themselves competitive.

A. Access to bank credit is low among the surveyed unorganized retailers

Only 10 per cent of the respondents had availed themselves of bank credit during the last year. This is much below the proportion of those who wish to secure bank credit at about 40 per cent.

1) Consumer Perception

a)   Preference for modern vs Traditional Retailers

Those who shopped at organized outlets stated that the main reasons as better product quality, lower price, one-stop shopping, choice of more brands and products, family shopping, fresh stocks, etc. Those who shopped at unorganized outlets attributed it to proximity to residence, goodwill, credit availability, possibility of bargaining, choice of loose items, convenient timings, home delivery, etc.

The survey also throws light on the fact that shoppers do not shop exclusively at the organized or the unorganized outlets. They shop at both outlets and the share of spending varies from product to product.

Total number of consumers which are to be sampled (N = 100)

a)   Visit of modern and traditional retail outlet gender wise

Modern	Traditional
Male -22	Male-21
Female-34	female-23

Table 4:

b)   Frequency Visit to modern Retailing

Frequency of the visit	Number of respondents
Daily	14
Weekly	25
Monthly	32
Occassionally	29

Table 5:

c)   Preferences of visit of modern retail outlets as per Age

Age	No of Respondents
15-25	35
25-35	32
35-45	21
45-55	12

Table 6:

d)   Amount of expenditure spent by Consumers in both types of Markets:

Monthly expenditure	Percentage of monthly expenditure out of monthly income
Average monthly expenditure	41.5
Monthly Spending at organized outlets	11.5
Monthly Spending at unorganized outlets	30.0

Table 7:

e)   Consumer preferences

Consumer preferences	Percentage of response from unorganised retailing	Percentage of response from organised retailing
Preference of Customers towards retail outlets	i) 38% customers prefers unorganized retail shopping but 36% customers prefer still both markets.	26% customers prefers organized retail shopping
Customers preferences towards the retail stores for purchase of daily groceries	38% customer's purchases daily groceries from local Grocery stores.	While 24% customers shop from Supermarkets. Rest portion prefer both.
Purpose of visiting malls		32% Customers visit mall for Shopping while

		36% visits for Entertainment and rest 34 % visits for Window shopping
Customer's satisfaction on the basis of price strategy adopted by malls:	28% customers are satisfied with the shopping deals served by the local Grocery stores	64% Customers are satisfied with the pricing strategy of the malls after considering various discounts, sales and other offers. While 8% Customers satisfied with both types.
Consumer's Preferences towards E -Billing	23% are satisfied with E- Billing of traditional Retailing	77% are satisfied with the E- billing od modern Retailers
Consumer's preferences towards self-service facility	13% are provided with traditional Retailing	67% customers are satisfied
Satisfied with entertainment facilities		82% consumers satisfied
Satisfied with i)convenient store ambience ii)one stop shopping convenience	16% customers are satisfied 21% consumers are satisfied	84% consumers are satisfied 79% of consumers are satisfied
Consumer preferences Towards brand quality provided by organized retailing		78% prefer branded products
Satisfied with proximity of location Cash Credit facilities	76% satisfied with proximity of location provided by traditional retailer 68% prefer cash credit facilities	

Table 8:

f) Impact on Consumers overall:
− Consumers have definitely gained from organized retail on multiple counts.
− Overall consumer spending has increased with the entry of the organized retail.
− While all income groups saved through organized retail purchases, the survey revealed that lower income consumers saved more. Thus, organized retail is relatively more beneficial to the less well-off consumers.
− Proximity is a major comparative advantage of unorganized outlets.
− Unorganized retailers have significant competitive strengths that include consumer goodwill, credit sales, and amenability to bargaining, ability to sell loose items, convenient timings, and home delivery.
g) Policy Recommendation
On the basis of the results of the surveys and the review of international retail experience, the study makes the following major recommendations which is given by ICRIER
1) Modernization of wet markets through public-private partnerships.
2) Facilitate cash-and-carry outlets, like Metro, for sale to unorganized retail and procurement from farmers, as in China.
3) Encourage co-operatives and associations of unorganized retailers for direct procurement from suppliers and farmers. Creativity, intiatives and new strategy should be adopted by traditional retailers to coexist with modern retailers.
4) Ensure better credit availability to unorganized retailers from banks and micro-credit institutions through innovative banking solutions.

5) Facilitate the formation of farmers' co-operatives to directly sell to organized retailers.
6) Strengthening the Competition Commission's role for enforcing rules against collusion and predatory pricing.
7) Regulation of Organized Retail: Formulation of certain "private codes of conduct" governing their relationships with suppliers. Simplification of the licensing and permit regime for organized retail and move towards a nationwide uniform licensing regime in the states to facilitate modern retail.
8) The organized retail business must come forward to introduce more innovations and creative business techniques focusing on affinity towards the local culture, custom, tradition and customers to withstand and survive well in the business.
9) Government should facilitate some policies for the unorganized retailers and should educate and create awareness among the unorganized retailers to reframe and modify business according to the needs of changing times.

VIII. Conclusion

The concept of organised retail is still primitive in India. The unorganised retail sector such as clothing, Grocery stores and various stores are working surprisingly well all over the country. Though with the entrance of big players like Wal-Mart or Reliance, Big Bazar, Pantaloon, the traditional stores are seemed to be vanished but from the survey it is indicated that India's organised and unorganized retail sectors can co-exist and flourish. The growth in the Indian organized retail market is mainly due to the change in the consumer's behaviour which is caused by increased income, changing, lifestyles, and patterns of demography and mainly preferences of consumers for shopping at a place where he can get food, entertainment, and shopping all under one roof. These preferences of consumer lead to boost

of Indian organized retail market. Since the traditional sector cautiously take care of the choice of the customers by bringing the product which is demanded by them and maintains a good relationship to retain them and also making selling price of the various goods low, traditional shops are seemed to exist. But if we see the impact of the organized retailers on their business in terms of sales, profit and employment it is true from the survey that their turnover, sales and profit are reduced to some extent. Therefore some kind of initiatives, creativity and new strategy are required for their future existence as this sector has the employment potential with wide coverage of market, serve the society by providing service to local and required population and opportunity for entrepreneurship development in the country. The government is also responsible to develop our traditional retail sector by providing them proper credit facilities, giving the scope to flourish and most importantly regulating the organised retail sector in such a way that it can't harm our deep rooted traditional Retail sector.

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