UK RETAIL CONSUMERS - ARE THEY BEING SERVED?

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ABSTRACT

The essence of this paper is an investigation of consumers' experiences, identifying sources of satisfaction and dissatisfaction, and methods of resolution. The empirical work engenders a perspective in this paper which extends beyond the usual parameters of the marketer. The findings reveal that any complacency that the product and service providers may have about levels of consumer satisfaction are misplaced. In addition to discussing the extent and nature of consumer dissatisfaction, the paper proposes a key means of redemption. The specific context of the research is the UK retail industry which, it is argued, merits concentrated focus due to the significance of its economic, social and consumer characteristics.

THE RETAIL CONTEXT

The past decade has seen a transformation (Kay 1989) and rapid growth in UK retailing, an experience shared by other mature economies (Gattorna 1985). Retailing now plays a significant role in the UK economy in terms of contribution to Gross Domestic Product, consumer expenditure and employment capacity (Maxwell 1992). It is not, however, only economic stature that renders UK retailing a relevant context for research. Rather, its research relevance is based on two further factors.

First, retailing represents a reflection of wider societal change in the UK. The post-industrial society is characterised by a decline in the male working class, feminisation of labour, and fragmentation of the workforce, with a substantial increase in part time, flexible work (Gardner & Shephard 1989 pp. 63-69). The structure of the retail industry closely mirrors these characteristics: the majority of employees in the sector are female, with few exceptions, retail work is increasingly associated with female labour, and staff structures typically observe the core (full time) and peripheral (part time) model (Maxwell Vol 2 #2), advocated by Atkinson (1984) for economic viability.

Second, retailing constitutes a manifestation of contemporary consumer behaviour, which in itself is a further reflection of societal - and even sociological - change. Consumer behaviour may be defined as 'the study of the decision-making units and processes involved in acquiring, consuming and disposing of goods, services, experiences and ideas' (Mowen 1990). An understanding of consumer behaviour is an essential pre-requisite to retail success, not least due the increasing sophistication and complexity of consumer behaviour (East 1990 p.23). A useful model of analysis of consumer behaviour is Mowen's three tier analysis (East 1990 p.6). The primary level of analysis is the individual consumer's exchange, where the focus is on the peculiar processes influencing individual buyers. Secondly, there is the micro-environment level, where buying behaviour is affected by inter-personal and situational factors. Thirdly, there is the macro-environment level of analysis which consists of the broad set of forces that influence large numbers of consumers to act similarly, for example economic conditions like rates of inflation and interest rates.

Therefore it can be asserted that the UK retailing context provides an important backdrop for research due to economic, societal and behaviourial factors. Though inter-related and inter-dependent (Kennedy 1989), the most important of these factors is, arguably, consumer behaviour, a contention succinctly supported by Wilkie (1990): 'consumer behaviour in fact performs a very important role in the economic (and social) fabric of society'. The primacy of this dimension is due to the precipitate effect of positive consumer behaviour: the inescapable truism is that only if service encounters result in exchanges of products and services for money are the other dimensions relevant. The corollary is that consumer behaviour generally, and consumer satisfaction specifically, within the retail context merits research attention.

RESEARCH AIMS AND METHODOLOGY

The particular focus of this paper is an

investigation of retail consumers' experiences, identifying sources of satisfaction and the main areas of expressed complaint and methods of resolution/ levels of satisfaction with the outcome/s. Thus, according to Mowen's typology outlined earlier, the levels of research analysis relate to the perspective of individual purchasers and to the micro-environment. The contextual specificity of the research is two retail sectors, namely fashion and fast food. These sub-sectors have a number of common features such as an increase in consumer expenditure, financial and physical accessibility, employment profiles, the immediacy and disposibility of product offerings, and the importance of the experiential dimension of the product to consumers. Furthermore, the sub-sectors of fashion and fast food are linked by their reliance on youth: in fashion retailing in terms of purchaser demand and supply through staffing, and in fast food retailing by employer reliance predominantly on young staff for labour.

The youth consumer and labour market is, in itself, worthy of attention due to demographic changes. It is estimated that the number of young people in the UK will decline by some 25% by the mid/ late 1990s (NEDO 1989), a statistic of acute implication for organisations which are heavily dependant on young people as external and/ or internal consumers. Fashion retailers may, however, take comfort from the prediction that, despite numerical decline, the 7 million strong UK youth consumer market will have a relatively higher spending propensity than in earlier generations of young people (Mintel 1989).

The primary data collected and analysed from the fashion and fast food industries for this paper forms part of wider, longitudinal studies in the two retail sub-sectors. The principal instrument of data capture in both the fashion and fast food environments was questionnaire. In the case of fashion retailing, a consumer questionnaire was developed, piloted and amended in November 1994. One hundred and twenty fashion shoppers were surveyed by interviewer-completed questionnaire using random sampling methods in January/ February 1995 at eight sampling points throughout Scotland.

In the case of the fast food sector, the questionnaire design was underpinned by focus group interviews with regional managers in one

major and expanding national fast food operator in order to determine appropriate language and terminology in the questionnaires. From the focused interviews, a staff questionnaire was developed and piloted in November 1994. The final questionnaire, revised from the pilot, was administered in all of the company's Scottish units by briefed Unit Managers. The questionnaire respondents were self-selecting. No reasons for non-response bias were identified and the respondents represented a cross-section of branch employees. The absolute number of respondents was 81, 31% of the sample population.

The scale of the empirical research patently precludes any claims of universality of findings; nevertheless the findings provide a sound basis for evaluation and discussion of key aspects of consumer satisfaction and, in effect, the management of consumer satisfaction in a highly relevant context, as justified earlier.

CONTEXTUAL CHARACTERISTICS

Fundamental to any evaluation of consumer satisfaction in fashion and fast food retailing is an appreciation of the characteristics of these particular contexts: the essential characteristics act as sources of insight, first, into bases of consumer satisfaction and, second, into management strategies and tactics which may be developed to meet the identified sources of consumer satisfaction. Whilst detailed analysis of the features of fashion and fast food retailing is clearly outwith the scope of this paper, recognition of the key features is integral to development of the research aim.

Fashion is a phenomenon that encompasses and represents external manifestations of the wearer's psyche (Horn & Gurel 1981), a 'social adhesive' which denotes social position and group membership (Holman 1980), and an application of mundane and practical uses, such as those relating to modesty and climatic protection (Horn & Gurel 1981). It is ultimately the role of the fashion marketer to manage these diverse sociological and psychological elements and so present a fashion proposition that is attractive, relevant and purchase-inducing. Despite general neglect as a research field, fashion is, however, of vital importance to the marketer. Fashion, as a process,

provides a prime example of the type of behavioural change outlined above, which is precipitated by the impact of social and environmental influences. Additionally, fashion provides a dynamic exemplar of products utilised as a mode of self-expression, signalling social position and feelings relative to others (Fromkin 1973). Finally, fashion provides an opportunity to study consumer inclination shift as opposed to static consumer preferences.

In market specific terms, the UK fashion consumer is more affluent, active [UK fashion spending has increased by 30% in the past decade (Economics Intelligence Unit 1993)] and sophisticated in product expectation. Coupled with the aforementioned sophistication of the consumer is the increase in the number of market participants, with the concomitant emergence of a highly competitive UK retail fashion sector.

Similarly, competition the UK fast food sector has become intense since the first outlet opened here 21 years ago, reflecting the 'worldwide phenomenon of more people than ever consuming fast food products' (Ball 1992). The increased popularity of fast food consumption, again, is reflective of the changes in life-style in the UK's post-industrial society. As products and services, like fashion and eating out, increasingly become the primary means of individual self-definition, consumption ceases to be purely functional, but becomes also 'symbolic and material' (Gardner & Shephard 1989 p. 48).

The number of meals consumed outside the home in the UK has risen steadily as a proportion of total consumer expenditure since 1987 (Hotel and Catering Training Company 1994). In particular, the fast food sector has enjoyed the greatest growth in destinations for such meals in the past decade (Hotel and Catering Training Company 1994), with a doubling of financial turnover (Hotel and Catering Training Company 1994). The dramatic success of the fast food sector in recent years is based upon operators' ability to satisfy consumers' requirements for 'convenience, speed and consistent quality' (Hotel and Catering Training Company 1994) with a highly standardised product and, until very recently, a highly standardised service (Harris 1985).

Thus the recency of business success for fashion and fast food retailing is attributable to societal change in general and precision in life-style target marketing strategies in particular. Both sectors have recognised that consumer purchase decisions are not solely based upon the evaluation of the substantive nature of the product, but that the intangible dimensions which are the deposits of marketing intervention - such as brand image, life-style associations and peer group value references - are the most dominant influences on product selection, brand loyalty and the maintenance of the customer franchise (Levitt 19983). This recognition is in accord with Levitt's (1983) realisation that most consumer products are generically non-differentiable and that it is the non-substantive elements which effect product uniqueness in the mind of the consumer. Previous research similarly indicates that competitive advantage is rarely gained through product development alone and that the only clear means of generating a differentiated offering is through the imprimatur of branding, packaging, advertising and promotion.

In effect, competitive advantage is established through the creation of a brand/ product 'personality'. Effective differentiation ensures a relationship between business and consumer, the undoubted basis of the relationship marketing movement (26). As to the manner of achieving this relationship in the studied retail sectors, the emphasis to date has been place on substantial resource investment in advertising and promotion activity in an effort to produce a unique image positioning which would satisfy the consumer's psychological and social needs and aspirations (Lewis & Hawksley 1990). But yet again, in markets that are highly competitive, image uniqueness is invariable impossible to maintain and protect since it inevitably becomes diluted and rendered ineffective from the replication of 'me-too' images and offers from other competitors within the market.

CONSUMER SATISFACTION: THE MARKETER'S PERSPECTIVE

How then is competitive differentiation to be achieved in the fashion and fast food markets characterised by homogeneity in both product and representational dimensions? Referring once more to Levitt's seminal discourse (Evans 1989), the

only credible means of achieving competitive advantage within post-industrial markets is through customer service delivered before, at and after the point of purchase. Levitt argues that excellence in customer service provides an insulation from competitor attack since it requires not only significant resource investment, but the creation of an internal culture and a business approach which is more difficult for rivals to emulate. Perhaps the most obvious and important benefit of all is that service signifies to the consumer a commitment and desire for a long-term relationship on the part of the business.

With the major fashion and fast food retailers publicly claiming a marketing-led approach to their business, the resultant corporate values are declared to be built upon the successful identification of consumer objectives. Although there exists an abundance of literature examining the processes by which retailers in the UK organise their consumer research activity, the same research suggests that the essential reference is consumers' potential requirements at the expense of measurements of customer satisfaction (or otherwise) with the service encounter. The fact that the service encounter represents both the reality of the retailers' offering (Moore 1994) and commercial catalyst, as highlighted earlier, is apparently largely ignored.

This research neglect is symptomatic of the fact that many UK retailers choose to measure performance mainly in strictly financial terms, resulting in failure to systematically identify, far less respond to, consumer opinion and satisfaction levels in relation to their experience of the retailer offer. This omission is ironic given the fact that the very premise of retailing marketing success is recognition and satisfaction of consumers' psychological and social needs. The methods used by the majority of retailers to measure consumer performance relies on evaluation of quantitative data such as sales turnover, takings per head of staff, volumes of goods returned, and direct complaints received by head office functions (Lewis & Hawksley 1990). In so doing, retailers lose an invaluable fund of information: what more direct way to solicit consumer satisfaction than tracking and acting upon consumer feedback, as in other service industries, notably the hospitality sector.

Other sectors of UK retailing, for example food retailing, have, nominally, sought to assign specific responsibility for the management of consumer feedback. In practice, though, this activity merely comprises offering expedient, point of sale solutions, rather than generating consumer feedback - both negative and positive - to build up a body of information on the dynamic of consumer wants and needs. Customer service departments, where they exist, are mainly responsible for the management of customer information and the facilitation of customer ordering, with little evidence to suggest that the staff responsible for customer service are sufficiently trained for the demands of customer complaint handling etc (Mintel 1994). In short, there is little indication that customer service departments have any credible powers by which to influence the direction and formulation of consumer-related strategies (Mintel 1994).

The absence of any attempt to directly and qualitatively gauge consumer feedback raises the all important question of the extent to which revenue from fashion and fast food businesses is being maximised. This question assumes greater importance in direct correlation with the intensifying competitiveness within the sectors and growing importance consumers attach to the service component of their retail experience, as noted above. The questionnaires sought to shed light on consumers' impressions of the quality of service they received. The results, discussed below, strongly support the contention that retailers neglect, and are consequently ignorant of, consumers' levels of satisfaction.

CUSTOMER SATISFACTION: RESEARCH FINDINGS

Overall, and contrary to the pattern of business success implied in quantitative business information, the surveyed consumers reported a high rate of dissatisfaction with the standard of service received when fashion shopping, as can be seen in Figure 1. A mere 17% of respondents recorded their level of satisfaction as either fairly or highly satisfactory. Such a proportion renders risible claims of knowledge of consumer needs inherent in marketing-led business approaches.

Figure 1
Rating of Standard of Service
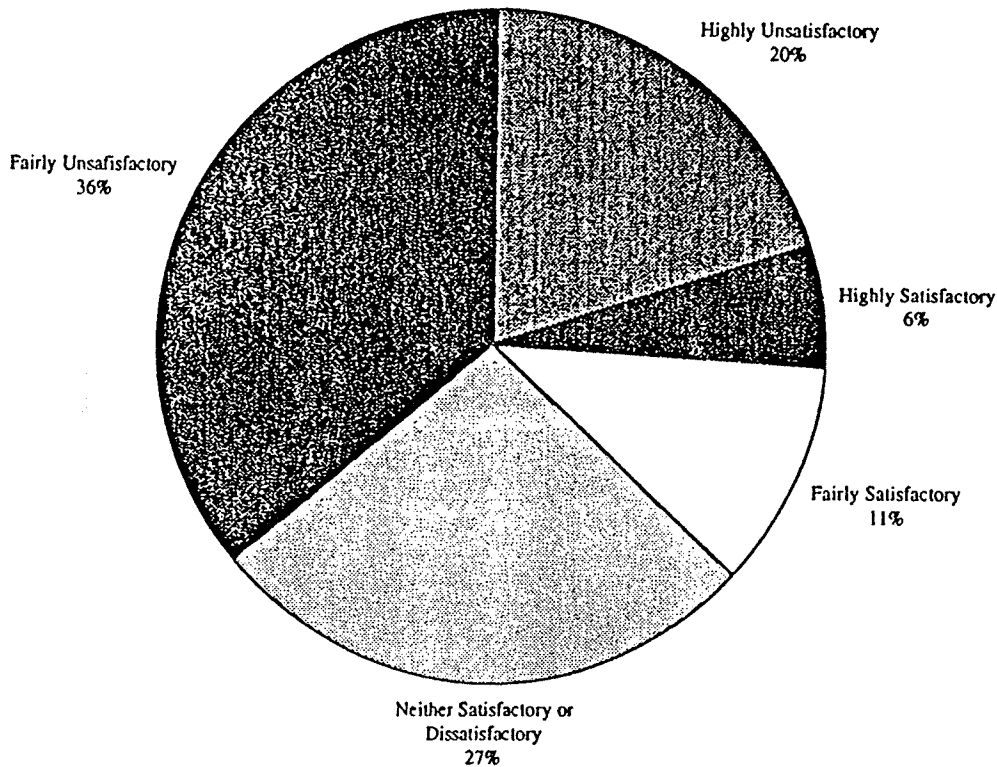
More damning still is the consumers' overwhelming impression that the standard of service as actually deteriorated in the past five years, a period when evidence from a wide range of perspectives proved that consumers were expecting more from service in retail exchanges. An astonishing 79% of respondents opined that the standard of service has declined in the last five years, as Figure 2 illustrates.

The culpability of the retailers in their lack of quality service provision is established when the consumers' expressions of dissatisfaction are considered. For the majority (88%) of respondents reported that they articulate their dissatisfaction in the store to either a member of staff or management. Only a minority (9%) express their complaint to the retail head office. Any reliance on the number and nature of complaints directed to head office level for interpretations of qualitative consumer feedback, therefore, seems unrepresentative of the totality of customer

Table 1
Manifestations of Consumer Complaints

Method	% of Respondents
complain verbally to a member of staff	49
complain verbally to a manager or supervisor	39
telephone a complaint to head office	5
write a letter of complaint to head office	4
write a letter of complaint to the retail outlet	3

Figure 2
Change in Standard of Service in Past Five Years
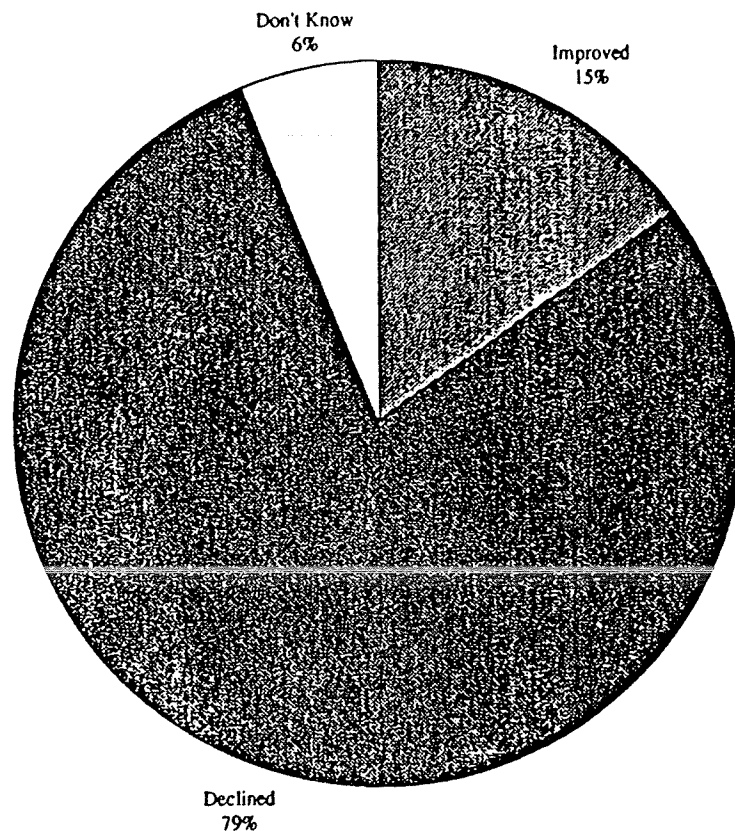
feedback and, consequently, a poor business indicator. Table 1 shows the respondents' manifestations of complaints.

Nearly two-thirds of respondents (61%) felt that their complaint was met with no response, again reflecting less than consumer oriented performance. Small wonder then that 63% of respondents felt that their complaint was taken seriously. Some 29% of respondents did, however, report that they had received either a verbal apology or explanation, suggesting that complaint handling and management is, in most incidences, confined to a localised level.

Thus any opportunity to use consumer complaints as a source of feedback upon which to adapt offerings is irretrievably lost. Clearly, the retailers experienced by the respondents are eschewing the principles and practices of 'learning environments'. In organistions which are learning environments the basis for continuing organisational transformation (Schon 1991 p. 203)

is critical reflection and action on information provided by staff acting as scanners of consumer behaviour in their routine episodes of consumer interaction (Schon 1991 p. 222). In the light of the foregoing consumer perceptions, it comes as little surprise that only a minority (14%) of respondents rate as either fairly or highly effective the ability of staff in handling their complaints (Table 2).

In view of the general deficiencies in consumer satisfaction that are emergent in the questionnaire results, it is rather curious to note that the respondent complainants do not appear to typically complain about their perceptions of service received. Only 11% of respondents stated that the reason for their complaint was the behaviour of members of the retail staff, compared to 51% and 23% respectively who attributed their complaint to product non-performance and lack of adequate staffing levels, as can be seen in Table 3.

Table 2
Effectiveness of Staff in Consumer
Complaint Handling

Degree of Effectiveness	% of Respondents
highly effective	2
fairly effective	12
neither effective nor ineffective	25
fairly ineffective	39
highly ineffective	22

Table 3
Reasons for Complaints

Reason	% of Respondents
product non-performance	51
lack of adequate staffing levels	23
behaviour of members of staff	11
administrative error (pricing, etc)	6
method of merchandising (eg layout, signage, etc)	5
dissatisfaction with range available	4

Nonetheless, the damaging effects of poor service should not be under-estimated, especially in a crowded marketplace. Although consumers may not feel sufficiently moved to express their dissatisfaction with the service they experience with members of the retail organisation, the majority (89%) do express their dissatisfaction with a friend and 18% encourage others not to shop with the offending retailer. Further, a third of respondents stated that as a result of the negative experience they would not shop with the retailer again and 5% actually translated their grievance into a letter to the press, thereby inviting particularly unwanted publicity. Table 4 summarises the other actions taken in response to a complaint apart from direct complaint to the retailer concerned.

It is obvious from these survey findings that the consumers' views are generally regarded as unimportant to retailers. The consumer therefore has, in a sense, an unheard, ineffective voice and only a passive role to play in the retailer-customer relationship. Yet consumer satisfaction levels indicate much capacity for improvement. Presumably, only if consumer dissatisfaction reached the point of substantial sales loss would the retailers take a proactive approach to customer expectations of service. In the meantime, it seems reasonable to assert that retailers are failing to maximise their revenue. Consequently, it becomes difficult to authenticate the claims of retailers that they are market-led and customer focused: in terms of consumer satisfaction with service received the retailers are demonstrably failing to meet or respond to their needs.

Table 4
Consumer Complaint Responses
**(other than direct complaint)**

Action Taken	% of Respondents
told a friend about the experience	89
refused to shop with the retailer	33
encouraged others not to shop with the retailer	18
written to the press	5

Note: this question invited multiple responses

CONSUMER SATISFACTION:
EXTENDING THE MARKETER'S
PERSPECTIVE

The survey results from the comparable fast

Figure 3
Employee Job Satisfaction
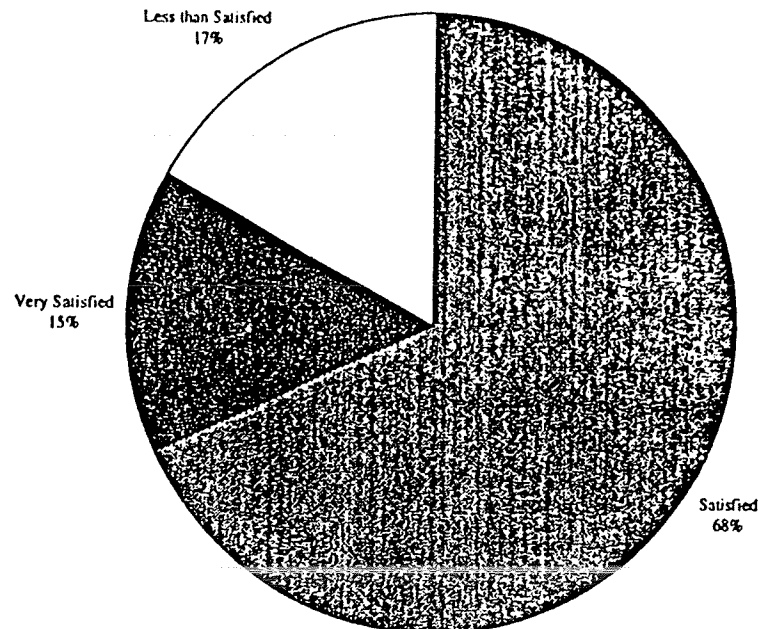
food sector distinctly suggest that the explanation for, or at the very least a key contributor to, the cause of sub-standard service lies beyond simply the performance of staff - the internal consumers - and in the attitudes and management of the staff. The research into the motivational forces influencing staff performance reveal that for the majority of the staff surveyed, their customers assume only a marginal importance in their working life.

The most frequently cited primary reason for the respondents' participation in work at all was, predictably, to earn money (73% of respondents); the second most frequently cited motive was career development (25%). Tellingly, in terms of occupational choice supporting these motives, the incidence of customer contact being given as a motive was statistically insignificant. As most retail occupations involve substantial customer contact, the negligible amount of interest the respondents have in working directly with them seems a precarious foundation on which to expect quality customer service. Somewhat paradoxically, however, the overwhelmingly majority of respondents (83%) reported that they were either satisfied or very satisfied with their job, as Figure 3 portrays.

The work factors generating these high levels of satisfaction, in rank order, are presented in Table 5. This table also underscores the relatively low priority of consumers for staff, with fewer than half (42%) of respondents noting dealings with customers as a motivator.

Indeed, most respondents appear to simply tolerate their consumers for pragmatic reasons, as indicated in the following comments proffered:

- *'it is part of my job to treat customers politely'*;
- *'without customers I would not have a job'*;
- *'good customer service is one of the most important aspects of my job'*;
- *'treating a customer correctly and politely ensures that they will feel happy and come back'*;
- *most of them [customers] are peasants [sic], however, my job requires me to be polite'*.

It has to be said, though, that there were an isolated few more positive comments, for instance:

- *'it gives me a good feeling to receive compliments from my customers'*.

Figure 4
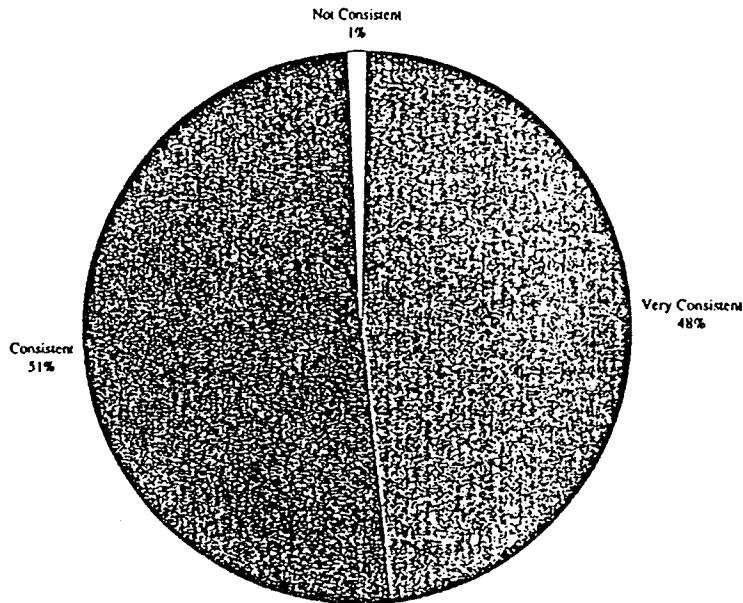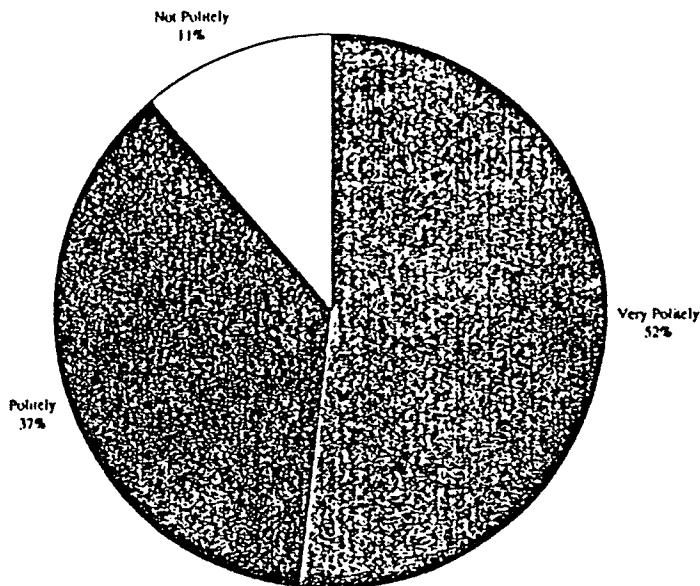**Consistency of Treatment of Customers**

Figure 5
Nature of Treatment of Customers

Whilst the respondents, by their own admission and by a number of indicators, consider dealings with their consumers peripheral to their job satisfaction, they propound that, nevertheless, they consistently treat consumers well. Figures 4 and 5 illustrate this point.

Evidently, therefore, there is a contradiction in the perceptions of external and internal customers

on the standard of service provision. This is a credible position when consumers' disinclination to express their dissatisfaction with service, detailed above, is recalled. The responsibility for this perceptual disparity can only rest with the retailers' management collectively. It was established earlier in the paper that marketing managers' consumer research is wanting. Now it appears that those charged with management of service staff - arguably both human resource specialists and operational managers (Storey 1992) - are wanting. The specific inadequacy of these managers is in employee recruitment, development and appraisal as the commercially imperative centrality of consumer satisfaction - customer focus -is not manifest in staff attitude.

Table 5
Intrinsic Motivational Factors

Motivational Factor	% of Respondents
teamworking	84
having responsibility	78
management style	67
working environment	53
receiving training	52
physical work	42
dealing with customers	42
shiftwork	35
pay and conditions	35

In addition to signalling the nature, extent and causes of consumer dissatisfaction, the empirical work also acted to expose the principal means of resolution of consumer dissatisfaction: service staff. From the external consumers' perspective, they hold the view that staff are the conduit for improvement in the management of customer complaints, as is implied in Table 6. Explicitly, as identified before (in Table 1 above), most complainants address their complaint at store level. It is at store, point of sale level, therefore, that customers should be informed of the reason for the

situation which gave rise to the complaint and the actions taken in response.

Table 6
Means of Improvement in Customer Complaint Management

Method of Improvement	Number of Responses
better staff training	18
letter of apology	10
dedicated staff for compliant handling	8
letter of apology/restitution (eg gift voucher)	5

Furthermore, as Figures 1 and 2 illustrated, staff themselves are the source of consumer dissatisfaction in their provision of increasingly sub-standard service. From the internal customers' perspective, the means to improving customer service is indirect, as is implicit in Table 5 (above) and Table 7 (below). For the respondents recorded that they were motivated by teamwork, personal responsibility, management style, their working environment, receiving training and physical work before dealing with customers. However, as Table 7 displays, one of the main effects of these motivators in positive customer service. The transparent message in terms of employee management is that improvements in the main motivating factors will be the route for enhanced customer service, supported, of course by appropriate direction, supervision and training.

CONCLUDING PROPOSITION

The route to improved consumer satisfaction in the UK retail contexts studied lies in effective co-incidence of consumer marketing and employee management at the point of service encounters. It is insufficient to focus principally or exclusively on the patterns of consumer behaviour as, ultimately, consumers' needs are met by the internal consumers. Thus equal emphasis deserves to be

placed on their management. In short, the empirical work on which this paper is based patently suggests that:

an opportunity exists for entrepreneurial retailers in mature markets, which are dependant on young people for their internal and external markets, to be differentiated through an emphasis on a functionally integrated, receptive and adaptive consumer relations strategy.

Table 7
Effects of Motivators

Effects of Positive Aspects of Work	% of Respondents
work harder	73
treat customers well	72
co-operate with management	69
treat workmates well	65
show initiative	64
stay with the company	62
feel happy	52
volunteer for extra hours	48

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