

Perspectives on 'Blue Sky'/Consumer Trends

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Using Consumer Diaries to Understand Shopping Behaviour

The need to help retailers understand their customers better is an enduring theme of academic research. Research conducted by the Centre for the Study of Retailing in Scotland (CSRS) is addressing this by moving away from the more traditional survey techniques to using consumer diaries as a means of collecting contemporaneous data regarding shopping experiences, which can be used to build detailed pictures of twenty-first century consumers.

CSRS is a partnership among the universities of Stirling, Edinburgh and Strathclyde. It was established in 2002, funded by the Scottish Higher Education Funding Council, to provide a resource to support and develop research in retailing in Scotland. The primary purpose of CSRS is to enhance the knowledge and understanding of Scotland's retail sector and each of the three universities is responsible for separate aspects of the research.

The University of Stirling is responsible for the creation and maintenance of the 'Scottish Retailing Bibliography', where a vast array of published material about retailing in Scotland has been compiled and consolidated. The University of Edinburgh is creating and maintaining an integrated spatial database of retailing in Scotland using Geographical Information Systems (GIS). The component of CSRS work undertaken by the University of Strathclyde involves the establishment of a consumer panel, to provide longitudinal data regarding customer buying patterns and attitudes, particularly towards the fashion retail sector. The benefits of this research to retailers lie in the availability of current, relevant information on particular consumer groups that goes beyond trend analysis and builds pictures of shopper groups.

The Strathclyde consumer panel comprises particular groups of consumers who keep a consumption diary for specific four week periods. These diaries detail which shops have been visited, any items purchased, as well as positive and negative aspects from each trip. This technique, based on the idea of 'critical incidents', allows the consumer, rather than the researcher, to determine what was important to them during the shopping trip. They are asked to describe not only what went well or badly during the trip, but to offer suggestions about how retailers could address the issues. In-depth interviews are then conducted with respondents in order to follow up on issues raised in their diaries.

'BLUE SKY' / CONSUMER TRENDS

Critical incident technique has an established history as a source of detailed data about consumers. It is based on the premise that an incident is 'critical' if the consumer remembers it and comments upon it. Incidents are then categorised and analysed according to both the nature of the incident and the consumer's response to it. The aim is to develop a database that can act as a research resource and which can be analysed to understand the shopping processes of Scottish consumers and their attitudes towards fashion brands and retailers, and to identify the nature of changes in consumer behaviour in the fashion sector. This data set will provide a consumer shopping behaviour resource for retailers and researchers. The research is focused in the first instance on the fashion sector and may be extended to other retail sectors in the future.

To date the panel members have included women with families, students and young professionals, disabled consumers, retired consumers and ethical consumers. A total of 807 incidents have been analysed of which 549 were classified as positive (the consumer was satisfied) and the remainder were negative (the consumer was unhappy with their experiences). In addition a related study, sponsored by Barclaycard, focused on the shopping behaviour of men and women shopping together and separately. The key issues that have arisen centre around the retail environment, customer service and bargain hunting.

Retail environment

The retail environment was mentioned most frequently by all respondent groups; as many as 229 separate incidences were reported. This aspect contributed to participants' negative perceptions of a shopping trip more than to their positive perceptions. This category typically included incidences such as crowding and cramped conditions in stores, queues and displays. The temperature in stores was a recurring theme mentioned by all consumer groups as contributing to their negative experience. Respondents felt uncomfortable in stores that were too hot and many reported that they had to leave shops before they had found what they wanted. Indeed, an overheated or stuffy environment was the single most reported negative incident. Untidy stores were another aspect of the retail environment to have contributed to all groups' negative experiences. The 'mess' in some stores was mentioned with regularity and frequently had an impact on the respondent's image of the store. For example, a number of shops were described as 'messy, untidy and dirty'. This untidiness, such as clothes lying on the floor, was particularly distressing for disabled consumers, as wheelchair users found they had to either pick everything up or roll over them.

The layout of stores was also important to evaluating the experience. Light, airy stores with plenty of space between merchandise frequently added to participants' positive accounts, while cramped shops were repeatedly mentioned as contributing to the negative experiences. Certain groups even felt excluded from these cramped stores, for example, mothers with prams or buggies, and wheelchair users would not enter some stores as there was not enough room to manoeuvre. Both groups reported withholding patronage from certain stores due to this problem. Men in particular were unwilling to patronise shops where they felt merchandise was difficult to locate or 'over-stuffed'.

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Finally, unsuitable access and a lack of facilities contributed significantly to the negative experience of mothers shopping with children, and the disabled. These problems occurred frequently and caused considerable distress for these groups, so are worthy of mention. Unsuitable access to stores, such as heavy doors or broken automatic doors, no lifts, steps instead of ramps, etc., all contributed to exclude disabled consumers and women shopping with children. Again this resulted in avoidance of certain stores by both groups. Several instances were reported of disabled entrances located at the rear of public buildings, which led to feelings of inadequacy and discrimination that disabled people were not allowed to enter through the same door as everyone else. Given recent changes in the law regarding discrimination against the disabled, these comments are important. It is not enough to have the facilities, they must be accessible. Disabled consumers also reported bad signposting making facilities difficult to find, the location of facilities at the very end of shopping centres, or facilities used as storage space making them unusable without assistance. These experiences promoted feelings of inadequacy and participants felt discriminated against; their exclusion led to negative impacts on their self-worth and worth as a consumer.

Customer service

Service issues were a consistent theme across the consumer groups. In general service issues were mentioned as a positive aspect, with over 100 incidents reported of good service compared to fewer than 50 examples of negative experiences, although students and the disabled were particularly critical of staff's attitudes towards them. Diaries contain repeated references to staff who speak to a wheelchair user's companion instead of directly to them and disabled consumers being treated as if a physical disability is necessarily an indication of a lack of intelligence. Similarly, student diaries contain instances of staff treating them as if they could not afford items and therefore as being undeserving of service, problems with returning goods due to staff being reluctant to believe their reasons for doing so, and generally a failure to provide good service. Given the spending power of both students and the disabled, these attitudes appear short-sighted. It is, however, indicative of a broader theme throughout this research that it is the tendency of retail staff to make assumptions about their customers based on appearance and to adjust the level of service accordingly.

Positive service incidents were frequently associated with key individuals who were prepared to use initiative to help or who demonstrated high levels of interpersonal skills in communicating with consumers 'as if they cared' what the outcome of the exchange was. Participants reported numerous examples of incidents that had the potential to be negative but were redeemed by helpful staff acting on their initiative.

Bargain hunting

All participant groups recorded delight at finding 'bargains' and 90 positive incidents focused on either finding a bargain or an item that was on sale or cheaper than they thought they would have to pay for it. Whilst price expectations were not specifically explored in the diaries, clearly finding an item they regarded as a bargain was a key contributor to a positive experience. This idea of a bargain is in relation to perceived

price rather than actual price, i.e., participants acknowledged spending more on a perceived bargain than they would have on a similar full-price item. This trend towards bargain and sale shopping was also reflected in consumers who decided to defer purchases until they were reduced or to 'wait for the sales' rather than buy full price items.

The aim of this research is to build a comprehensive picture of the Scottish consumer by allowing them to indicate what was important to them during a shopping trip. Initial results suggest that, contrary to popular belief, consumers are generally satisfied with the customer service they receive and in general shopping experiences are positive. Analysis of mood data suggests, however, that shopping is a stressful activity with the majority of consumers returning in a worse mood than when they set out. Women in particular set out on shopping trips with high expectations and anticipation and rated themselves as more stressed and in a worse mood when they returned, regardless of their purchases.

The implications for retailers of this current analysis are that environment issues, in particular crowding, the temperature of shops and malls and the availability and accessibility of facilities, are of most concern to consumers. Customer service issues were generally of less concern, in part because service in general is perceived to have improved in the last five years and also because consumers feel that they are more demanding of service and willing to speak up for themselves when things go wrong. The main customer service issues reported to date have focused on the variability of service, with consumers across the diary groups feeling that staff make too many judgements about 'suitable' customers based on their appearance. Male consumers in particular mentioned the difference in service they receive according to how they dress. If, as the results suggest, shopping is not a mood-enhancing experience for either sex, managing the tangible aspects of the environment and encouraging staff to care about the outcome of a purchase experience are essential.

Detailed analysis of the diaries, interviews and three related surveys into consumer shopping activities are available through the CSRS website: www.csrs.ac.uk