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Do Customer Preferences have Profound Impact on Market Share? Exploratory Research on UAE Retail Market

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Customers feel happy when the services offered by retailers are satisfactory to meet their expectations. Acknowledging diversity in customers' expectations, retail marketing demands new sets of competency, rational to satisfy their differential choices. Apparently, shift in volume of customer penetration, loyalty, or price sensitivity towards a retailer decide customer's preference for a shop. Conceptualizing these facts, this paper, focusing on the aforesaid variables, aims to identify the profound impact they could make on overall share of retailers in Abu Dhabi market. Administered with a questionnaire the survey was carried at two periods leaving one year interval to assess the impact of customers' choice shift on market share. Sample of 400 hundred consumers, incorporating six nationalities was used, conceiving 10 per cent shift in the second year. Employing a model to assess retailers' overall market share, findings tend to support retailers in reviewing their customer relationship strategy to tow in more customers to showrooms.

Keywords: Retail Marketing, Consumer Preference, Customer Loyalty, Market Share, UAE Markets

1. Introduction

Customers form the core group of any business. Customers undergo positive experiences from purchases if the services offered by retailers are satisfactory to meet their expectations. Hence, fulfillment of customer expectations is the priority for any enterprises. Obviously, the art of attracting customers as well as retaining their loyalty are the challenges the retail enterprisers face to sustain their market.

Since customers possess two levels of expectations ranging from desirable to acceptable level, which often vary in accordance to the augmented services offered to them, retailers struggle hard to fill showrooms with everything what customers demand. Unfortunately, many immature retailers struggling with susceptible businesses often fail to meet customers' desirable level of expectation at the time of purchase; hence obviously, customers are compelled to shift from desirable to acceptable level of satisfaction by buying whatever is being offered to them. The difference between the desirable and acceptable state of satisfaction is defined as

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the zone of customers' tolerance (Kotler, 2003) and past studies have proved that sometimes, if the customers remained in the aforementioned zone for a longer period of time, it may force them to search for alternative distributors (Lovelock, and Wirtz, 2007 and Pride *et.al*, 2005). It is also true that the reason for the transit of customers' attitudes to the aforesaid zone is often situation-specific. But the task to shift them back to desirable level, understanding their situation-specific expectations, has been found to be a never ending challenge for retailers.

Though several alternatives have been recommended to satisfy the situation-specific expectations of customers (Jobber,2007 and Kotler, *et.al*, 2009), offering plenty of choices with desirable brand options at expected cost is the common retail strategy adopted by vendors in most of the market (Gifford, 2006).

It is a proven theory that choice may vary from customer to customer (Kotler, 1972, Sugandhi, 2002 and Vanaja, 2010). For instance, if cost of products (economic criteria) would be the apprehension in selection of a shop for a few customers, brand option could be the concern of others (personal criteria). Whatever be the reason, it is time to realize that in the current scenario, while the major functions of retailing are being replaced with e-shopping, if consumers wish to shop in malls, certainly their choices, more or less, would be seldom influenced by several augmented services that are affordable for the retailers to entertain them. These expected services may vary from the design and ambience of showrooms to anything that a retailer could promise to satisfy customers' craze for in-shop amenities to out-shop services such as car parking, children's play area, free home delivery, credit facilities etc (Vanaja, 2009).

Summarizing the above discussion, it is apt to acknowledge that the fast growing global markets are promising vast opportunities to retail industries across the world. Unfortunately, the performances of majority of these retailers are not at tandem with the reality of 21st century's direct marketing. Yet, with the creation of new sets of competency, rational to satisfy customers' differential choices, retailers have to profitably sustain their market share on an optimal basis.

Conceptualizing the fact that in the context of globalization, sustainability of a retailer would be measured not only in terms of the sales statistics they produce annually but also the volume of consumers' constancy that they gain, the objective of this paper is to identify whether the customer loyalty has any profound implication in the market share of retailers?

Focusing on the UAE retail markets, this paper makes an attempt to explore the choice criteria that influence the UAE customers in selection of their favourite super markets. Appraising the features that influence consumers' priority in selection of retailer, this paper makes an attempt to classify reputed UAE retail shops, selecting Abu Dhabi market as case example. This study facilitates the researcher to identify prevailing gaps in retail marketing which would help enterprisers to design strategies to meet consumers' desired level of expectations.

2. Abu Dhabi Consumers

Holding the largest number of population among the seven emirates with eighty per cent expatriate work force, Abu Dhabi, with a GDP per capita income of $63000, builds the strongest consumer market in the gulf region (Neilsen, 2009). When the global markets were threatened with shutdowns and jobs cuts, Abu Dhabi remained as one of the top most promising markets with high consumer confidence index. Relatively speaking, it was much better off than most of its neighbouring countries. Initial findings of the survey conducted to identify the spending habits of families in Abu Dhabi revealed that during the last few years the consumption tendency in Abu Dhabi has gone up alarmingly high that the consumers spend up to 60 per cent of their income on durable and non- durable goods compared with other Arab nations (Vanaja, 2009).

Owning the best infrastructure in the Gulf region, the Abu Dhabi retail markets are emerged into the most highly diversified, self-contained supermarkets with world class shopping facilities to a high disposable income-holding population. This justifies the reason for the selection of Abu Dhabi as case example.

3. Literature Review

The basic unsolved issue prevailing among the retail marketers is how to fully satisfy all their customers who demand a range of choices. In fact, traditional markets define choice as selection between innovation, efficiency, quality, cost etc, (Churchill *et. al*, 1982, Halstead et al., 1994 and Oliver 1997) few others believe that in a contemporary market the concept of choice does not exist as all the products demanded are often essential for them. In such circumstances the dimensions of quality and price are no longer a trade-off (Jobber, 2007). Therefore, the move towards the above notion alarms retailers to bear in mind the fact that compelling a customer to finally select their retail outlet is the challenge they have to encounter.

Often, customers' preference is also defined as the experience provided by and associated with particular choice resulted out of their beliefs about an object, action, or condition compared to ones values (Westbrook and Michael, 1988). Referring the above review, few studies suggest that customers' preference for a retail shop depend largely on the buying behaviour pertaining to them and often, it may vary from daily buying to weekly buying outlets (Manroe, *et.al,* 1975; Thelen and Woodside, 1997 and Kotler 2003). Moreover, recent report on the impact of economic downturn on UAE consumers discovers that consumers spend more time in search of options before they spend money for purchase (Market Research.com, 2010). When success of retailing is assumed to be a sum total of all the above, obviously, retailers are compelled to critically evaluate each steps in the process and their involvement in retail marketing. Since it is true to believe that customer value could be derived from any element or combination of elements in a total supply chain and not just from final package or service image (Jobber, 2007), with all efforts, retailers have to challenge swiftly and smartly any unexpected market changes (Valerie, 2009).

It is a general assumption that the product/service supply chain is the most difficult task in marketing because it is less homogeneous and remains subject to local, mainly cultural, variances (Daniel, 2009). Perhaps, this could be the reason, similar to product life cycle, retailing also passes through vigorous stages in its birth (Davidson e*t. al.,* 1976 and Brown, 1990) that foretells its future from time to time. In general, at the entry stage, retailers usually attempt to capture market with a price cut, low cost and narrow profit margin. Eventually when favourable market trend receive, they trade up in the market with improved displays and locations, credit facilities, delivery and sales services (Brown, 1990). As referred commonly in many studies, some retailers begin with a wide assortment of goods ranging from convenient to selective; but later, gaining a good market share, eventually, they will be shifted into specialty shops (Hollander, 1966; Brown, 1990 and Mark Stephen, 2009).

No doubt, in order to challenge the economic downturns, much has been recommended in the past studies (Andreassen,Tor and Bodil, 1998; Elg and Johnson, 1996, Ryle, 2002 and Hayward, 2002) including the need to retain retail image (Zimmer and Golden, 1988), that may vary from store to store, depending on the impact it makes on each consumer segment from one situation to another (Stan, 2006). In response to the aforesaid development, an emerging literature has addressed a variety of attributes that influences customers' choice including price, quality, selection, service, and location (Mattson, 1982, Steenkamp and Wedel, 1991 and Woodside and Trappey, 1992). However, in contrast to the aforesaid reviews no studies were so far made any attempt to assess the impact of shift in consumers' choice for retail shops in the market share of retailers in gulf regions. Hence, this study assumes that any shift in customer choice criteria (model 1) could profoundly impact on the market share of a retailer.

Model: 1

Overall Market Share	=	Customer Penetration	x	Customer Loyalty	x	Customer Selectivity	x	Price Selectivity

Conceptualizing that the variables in the model are the deciding components of customer choice (Kotler, 2003), the study is designed with two opposing but not mutually exclusive hypotheses such as:

H1: Shift in customer choice of supermarkets would make profound impact on the share of retailers in the total retail market in Abu Dhabi.

H0: Shift in customer choice of supermarkets would not make any profound impact on the share of retailers in the total retail market in Abu Dhabi.

Though model.1 analyses the market share of each retail shops in terms of four components, the application of model was subjected to some limitations such as, only five essential product items were selected, ignoring brand preferences and reasons for preference by customer. Moreover, since pricing regulatory policy of the government of UAE stabilizes the prices of most of the essential products, to appraise price selectivity, price changes on bread (FMCG) items were included in the survey.

4. Methodology

The genesis of this research traces back to my vacation visits to Abu Dhabi markets in May 2009. This visit inspired me to start an academic journey of discovery to understand more fully the in-house response of customers about the products and services offered by retail marketers in Abu Dhabi. The exploration of factors that influence consumers' choices has inspired the study to discover the competency of each retail markets evaluating their relative market share.

Focusing on customers buying responses, this paper has selected four major leading supermarkets as case examples, namely Carrefour, Spinnys, Abu Dhabi Co-operative (AD Coop) and Lulu / EGM Group.

Parting into two stages the first stage of research instrument to analyze four components such as: customer penetration (percentage of all customers who buy from a supermarket), customer loyalty (purchase same product from a particular supermarket expressed in percentage to total purchase from all sample supermarkets for a particular period of time), customer selectivity (size of average customer purchase from a particular supermarket expressed in percentage to size of average customer purchase from all sample supermarkets) and price selectivity (average price charged by particular supermarket expressed in percentage to average price charged by all retailers). In the second stage the respondents’ ratings were applied in the formula given in model 1.

The primary survey was conducted at two phases, in May 2009 and 2010, leaving one year interval to discover whether any shift in customer choice had made impact on the market share of a retailer. In the first phase a survey was conducted, randomly selecting four residential zones from Abu Dhabi city. A sample of 400 consumers, 100 each from four major zones, covering six nationalities with a mean age of 30 and average income of AED 5000 per month were randomly selected for study. Same sample size (400), conceiving 10 per cent shift, in the number and type of respondents assuming transfer or relocation of residence, suggested by the Municipality of Abu Dhabi, was used in the second phase of survey. Administered with a closed questionnaire the data on customers’ buying habit for five essential edible products, quantity-wise as well as shop-wise, was collected for analysis. In the first phase, study received 90.25 percentage filled questionnaires but in the second phase it was reduced to 86.75 percentage of total sample size. However, selecting four leading retailers, study was concentrated in the main four zones of the Abu Dhabi city. Customers’ perception on market share was the main theme of the study, excluding retailers’ data. These were the main limitations of this paper.

5. Findings

5.1 Customer Penetration

Retail trading, indeed, demands periodical performance evaluation to ensure market sustainability, promising maximum value to customers. Consumers' choice of a store is based, in part, on the functional qualities it may possess, and by other, less tangible or psychological attributes (Lindquist, 1974) which could make a shift in choice of consumers (table 1)

Table 1: Customer Preference of Supermarkets: Nationality Wise

Super markets		US, Europeans Australians		UAE Arabs & other Arabs		North Asians		South Asians		Total	
Year		'09	'10	'09	'10	'09	'10	'09	'10	'09	'10
No. of respondents		86	102	92	98	94	79	89	68	361	347
Carrefour	Count	28	47	31	32	22	20	34	26	115	125
%		24.4	37.6	26.9	25.6	19.1	16.0	29.5	20.8	100	100
% Nationality		32.5	46.1	33.6	32.7	23.4	25.3	38.2	38.2	31.85	36.02
% (Total)		7.76	13.5	8.58	9.2	6.09	5.76	9.41	7.49	***31.87***	***36.02***
'09 to '10*****		-	67.8	-	3.2	-	-9.1	-	-23.5	-	8.7
Spinnys	Count	33	29	9	5	4	1	26	17	72	52
%		45.9	55.8	12.5	9.6	5.56	1.9	36.1	32.6	100	100
% Nationality		38.3	28.4	9.78	5.1	4.25	1.3	29.2	25.0	19.94	14.9
% (Total)		9.14	8.3	2.49	1.4	1.1	0.2	7.20	4.9	***19.94***	***14.98***
'09 to '10*****		-	-12.1	-	-44.4	-	-75	-	-34.6	**-**	*-27.7*
AD Coop	Count	14	14	33	38	30	26	11	14	88	92
%		16.9	15.2	37.5	41.3	34.1	28.3	12.5	15.2	100	100
% Nationality		16.2	13.8	35.8	38.8	31.9	32.9	12.3	20.5	24.37	26.5
% (Total)		3.9	0.2	9.14	10.9	8.31	7.5	3.04	4.03	***24.37***	***26.53***
'09 to '10*****		-	-	-	15.1	-	-13	-	27.1	**-**	*4.54*
EGM/LULU	Count	11	12	19	23	38	32	18	11	86	78
%		12.8	16.6	22.0	28.3	44.1	41.	20.9	14.1	100	100
% Nationality		12.7	11.8	20.6	23.5	40.4	40.5	20.2	16.1	23.8	22.47
% (Total)		3.04	3.5	5.26	6.7	10.5	9.2	4.98	3.2	***23.8***	***22.47***
'09 to '10*****		-	9.1	-	21.5	-	-15	-	-38	**-**	*-9.7*

Note: Customer penetration = Percentage of all customers who buy from supermarket; Figures in Italic are customer penetration rate for: May '09 & '10 *

Significant shift in respondents choice was found among the western consumers who showed an interest towards Carrefour from 32 (2009) to 46 (2010) percentage. Though Carrefour and Cooperatives showed a positive growth, respondents' choice for Spinnys and EGM showed a decline from 2009 to 2010 (fig 1).

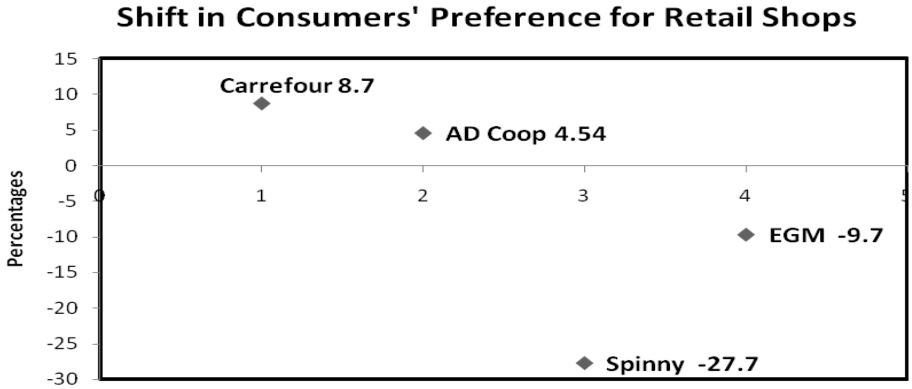

Fig.1 Customer penetration rate in % (2009-2010)

5. 2. Customer Selectivity

To analyze the size of average purchase from each shop, the study has selected the most frequently buying five food items; milk products, bread items, cereals & pulses, vegetables and meat products (table 2).

Table 2. Average purchase from sample retailers

Weekly average Consumption			Average purchases/ week from each supermarkets									
			Carrefour		Spinnys		AD Coop		Lulu/EGM		Others	
	2009	2010	‘09	10	09	10	`09	10	`09	`10	`09	`10
Milk	18.1	17.5	6.9	10.1	1.4	0.7	5.3	3.6	4.3	3.1	0.5	
% average			38.1	57.7	7.1	4.0	29	20	23.0	17.7	2.8	
‘09 to ‘10	*shift*	*-3.31*		*78.1*		*-50*		*-29.4*		*-27.9*		
Bread	13	11	3.0	4	2.0	1	6.0	4	2.0	2		
% average			23.1	36.3	15.3	9.0	46.2	36.3	15.5	18.4		
’09-‘10	*shift*	*-15.3*		*33*		*-50*		*-33.3*				
Cereal Pulses	8.9	9.1	2.3	3.1	1.2	0.4	3.1	2.9	1.3	2.4	1	0.3
% average			25.8	34.1	13.4	4.4	34.8	31.9	14.6	26.4	11	3.2
‘09 to ‘10	*shift*	*2.24*	-	*34.7*	-	*-66*	-	*-6.5*	-	*84.6*		
Vegetables	14.6	12.2	5.21	4.1	4.3	1.1	1.3	2.1	3.1	4.2	0.7	0.7
% average			35.5	33.6	29.4	9.1	8.9	17.2	21.9	34.4	4.8	5.7
‘09 to ‘10	*shift*	*-16.4*		*-21.3*		*-74*		*61.5*		*35.4*		
Meat	9.2	13.1	3.2	5.2	1.34	1.1	2.5	1.7	2.1	4.2	0.1	0.9
% average			34.7	39.7	14.5	7.6	27.4	12.9	22.8	32.9	0.6	6.9
‘09 to ‘10	*shift*	*42.3*		*59.3*		*-3*		*-32*				
Total (Kg)	63.8	62.3	20.6	26.1	10.2	4.1	18.2	14.3	12.5	16.1	2.3	1.7
%	100	100	32.3	41	16.1	6.5	28.5	23.1	19.6	25.9	3.5	2.7

Note: figures in italic indicate the % shift in consumption from 2009 to 2010*

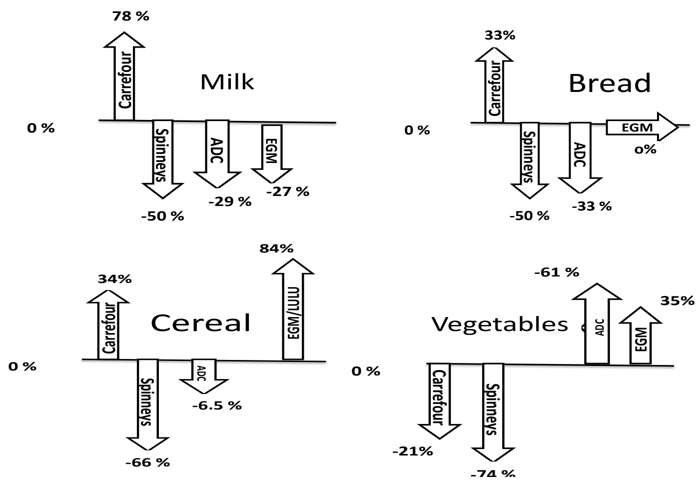

Fig 2: Shift in choice of retail shops for purchase of essential goods (2009-2010)

Self explanatory figure (2) reveals the change in the selection of the retail shops from 2009 to 2010. While Carrefour retained the customers' choices for milk, bread and cereals, respondents' preference for Spinny's showed a remarkable decline.

5.3. Customer loyalty

Customer loyalty is viewed as the strength of relationship between an individual's relative attitude and repeated patronage (Tom *et al.,* 2008). To analyze customer loyalty among selected five products, the least perishable product, cereals and pulses were selected, considering the interval in repeated purchase. Perhaps, it is true that satisfied customers would make repeated purchases from the same supermarket and often encourage their friends too to buy from same shops. Drastic increase in loyalty towards EGM and Carrefour could be seen but more than it the study observed the increase in customer interest on other small types of retail traders (table 3 and fig. 2). Home delivery and availability of products in small quantity are few reasons listed by respondents for their preference for other shops.

Table 3: Customer loyalty in terms of average purchase per week from each supermarket

Supermarkets	2009		2010		% Change 2009 to 2010
	Kgs	% to total Average	Kgs	% to total average	%
Carrefour	2.3	25.8	3.1	34.1	34.78
Spinnys	1.2	13.4	0.4	4.4	-66.6
Abu Dhabi Coop	3.1	34.8	2.9	31.9	-06.1
Lulu / EGM	1.3	14.6	2.4	26.4	84.6
Others	1.0	11.4	0.3	3.2	220
Average/week	8.9	-	9.1	-	02.4

Fig. 3: Shift in choice of retail shops for purchase of essential goods (2009 to 2010)

5.4 Price Selectivity

Price selectivity often influences customers' preference to buy a product from a particular retailer. Any shift in price of goods may shift customer choice for shops. However, since price of essential commodities are regulated by the UAE government, most of the supermarkets are offering same price for the sample commodities except with slight variations in the in-shop made products like bread, sandwiches etc.

Hence the study has selected bread of uniform size from the sample supermarkets as a case example (table 4).

Table 4: Price selectivity shift from 2009 to 2010

Supermarkets	2009		2010	
	AED	% to total average	AED	% to total average
Carrefour	4.5	130.81	4.75	126.66
Spinney	3.75	109.01	4.0	106.66
Abu Dhabi Coop	3.0	87.20	3.25	86.66
Lulu / EGM	2.5	72.64	3.0	80.00
Average price of bread	3.44		3.75	100

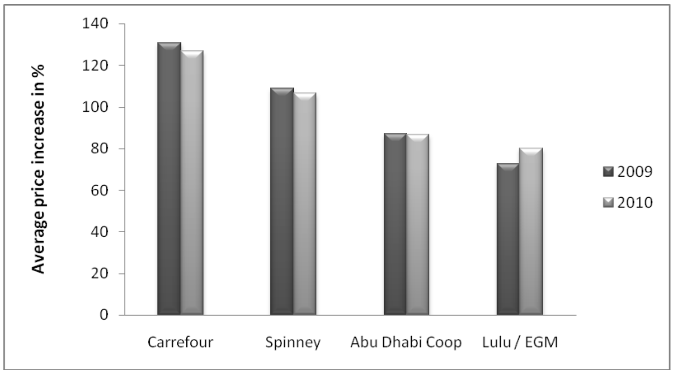

Fig 4: Shift in Price from 2009 to 2010

Even though all the retailers showed a gradual shift in price, shift in percentage to total average was recorded high for lulu. Though Carrefour showed an increase in price, the average shift in price compared to other retailers showed a favourable choice for Carrefour by the respondents.

5.5. Overall Market Share

Shift in market share is indicator for a retailer's upheavals. If a retailer sense that his/her market share is decreasing, it is a warning that competitors are using more effective strategies to retains or attract customers (table 5).

This study seeks to analyze the profound impact of customers' preference on overall market share. Table 5 revealed the change in overall market share of each retailer in accordance to the shift in customers' choice of retail shops in terms of their penetration level, degree of loyalty, selectivity of shops for essential goods and impact of change in price. Since the study found that the overall market growth of retail stores is aligned with the positioning of retail store in the minds of consumers (Fig. 5), the study rejects the null hypothesis *μ0.*

Table 5: Overall Market Share and Shift from 2009 To 2010

	Customer Penetration		Customer Loyalty		Customer Selectivity		Price Selectivity		Overall Market Share	
Year	'09	'10	'09	'10	'09	'10	'09	'10	2009	2010
Carrefour	31.8	36.0	25.8	34.1	32.3	41.8	130.8	126.6	3.46	6.5
Spinney	19.9	14.9	13.4	4.4	16.1	6.5	109.0	106.6	0.46	0.46
AD Coop	24.3	26.5	34.8	31.9	28.5	23.1	87.2	86.6	2.1	1.6
Lulu/EGM	23.8	22.4	14.6	26.4	19.6	25.9	72.6	80.0	0.49	.12
Others			11.4	3.2	3.5	2.7				

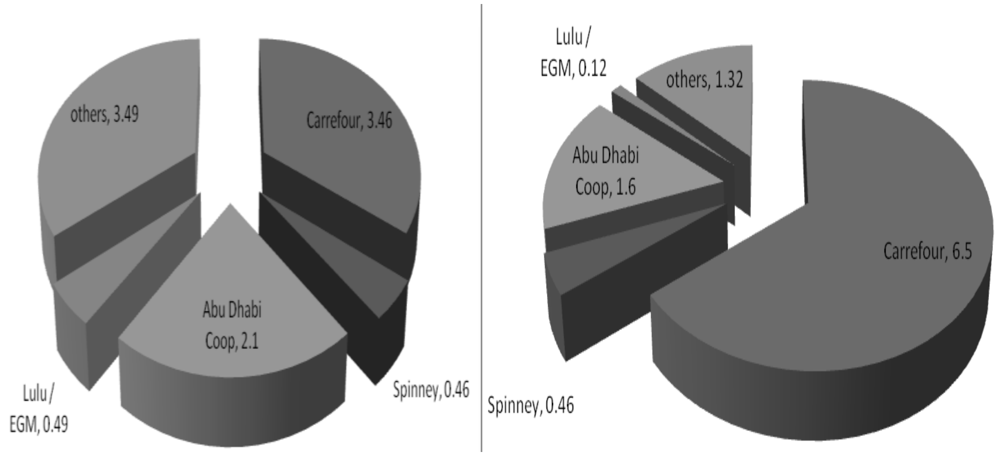

Fig 5
Shift in the overall market share of selected sample retailers in Abu Dhabi market

5. Conclusion

Offering products that customers want, pricing them appropriately and developing well designed promotional plans are not sufficient conditions to gain and retain customers' choice. Influencing and impelling customers to recommend their favorite choice of retailer to others also an effort that demands intense efforts to deliver the services at customers' desirable level. No doubt, many retailers need periodical evaluation to know their positioning in the minds of consumers as well as in markets. This study finding that the overall market share of a retailer is to a greater extent focused on consumers' choice, suggests them to design customized strategies to optimizing the customers preference for their shops and thereby, increase their penetrating rate to assure sustainable advantage over competitor.

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