

# NON-WESTERN RETAIL VALUES IN CHINESE CULTURAL RETAIL SERVICE SETTINGS

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**Abstract:** A self selected purpose sample of Chinese hypermarkets customers were surveyed (N=230) to explore Chinese customer perceptions of and behavioural intentions towards Western, Hybrid, and East-Asian format hypermarket retailers. Structural equation modelling and correlation analysis confirm data reliability and validity. Management interviews and in-store observations added further richness and depth. As hypothesized, the Western format has the highest level of perceived service quality. However, the referral intention is not significantly high then the East Asian format that has lower levels of perceived quality. We draw conclusions for management and measurement of retail service quality in Chinese settings

## INTRODUCTION

Eighteen hundred hours; Central Taiwan; Local shopper.

A self selected purpose sample of Chinese hypermarkets customers were surveyed (N=230) to explore Chinese customer perceptions of and behavioural intentions towards Western, Hybrid, and East-Asian format hypermarket retailers. Structural equation modelling and correlation analysis confirm data reliability and validity. Management interviews and in-store observations added further richness and depth. As hypothesized, the Western format has the highest level of perceived service quality. However, the referral intention is not significantly high then the East Asian format that has lower levels of perceived quality. We draw conclusions for management and measurement of retail service quality in Chinese settings

On her way home, Mrs. Lee pops into the locally grown hypermarket, RT-Mart, to pickup soy milk, toothpaste, and tissues. Mrs. Lee has promotions thrust into a hand as she enters, making her way through narrow crowded isles. The air crackles with over modulated bullhorns carrying the calls of sales and product demos. Olive oil is on promotion. A store associate is standing by, and Mrs. Lee strikes up a conversation about the brand's ingredients and gets some tips on other store deals. Having picked up more than ten items, the express lane is not an option. Mrs. Lee is certain she is forgetting something, beside the soy milk that was out of stock, but she is quite happy with all the great bargains.

Eighteen hundred hours; Central Taiwan; Expatriate shopper.

Mr. Smith double checks he has his shopping list as he pushes into RT-Mart. The unbearable chaos overwhelms him, even though he has been shopping here many times. If those bullhorns get any louder, he thinks, the otologist will be getting another visit. Promotional flyers are quickly disposed of, as Smith knows exactly the isles he is targeting: milk, toothpaste, and tissues. Boxes of olive oil stand as low lying barriers, and product demo staff attempt to ambush him. Mr. Smith is proud of his doggedness as he glides through the express checkout lane.

This scenario typifies a Chinese customer's hypermarket visit: few lists, a search for bargains and a desire for friendly service staff in a renao setting. With a Western cultural mindset Stan, however, fails to understand this culturally defined retail service encounter. While hypermarket encounters appear the same across cultures their interpretation is different. Consequently, people in different cultures interpret measurement constructs in a variety of ways.

We suggest a form of culturally based marketing myopia arises when managers rigidly adhere to home country models. What is right in one place becomes wrong in another and represents a miss direction of resources (Gadiesh et al., 2007). The perception and understanding of differences in culture and organization underlies much of these problems by creating a sense of distance between home and foreign markets.

The Far East and the West is culturally distant. Consequently, the Far East requires localized service retail management approaches. This is difficult for international retailers: five international retailers exited Taiwan in a six year period (Year of exit given in brackets. Makro: hypermarket (2003), Boots: pharmacist (2005), TESCO: hypermarket (2006), B&Q: DIY chain (2007) and Marks and Spencer: food and clothing retailer (2008)).

Rising incomes in late 1980s made Far Eastern economies attractive for foreign Hypermarket retailers (Dawson et al., 2003). The "persistent competitive advantage" of the local format i.e., the wet / traditional market (Goldman et al., 1999, Goldman et al., 2002) intensifies the now competitive market (Hsueh, 2005). This reflects sales in wet market sales of c. \$14Bn against hypermarkets of c.\$4Bn in Taiwan (Hsueh, 2005). Foreign formats include high quality service in a modern clean air conditioned format and offering large product ranges. Chinese customer may prefer these formats (Trappey and Lai, 1997). However few, if any, studies have explored customers' responses to local and foreign hypermarket formats.

The paper starts with a grounding in the focal hypermarkets (phase 1). We then explore the relationship between retail service quality and outcomes (phase 2). This reveals insights for foreign hypermarkets to effectively design their offerings to appeal to Chinese customers across the Greater China region

## PHASE 1 GROUNDING OBSERVATION OF LOCAL FORMATS

Observation focused on three hypermarket formats: East-Asian, hybrid and Western (RT-Mart, locally developed; Carrefour, a joint venture and Tesco, Western ownership, respectively). During an eleven month period the research gathered in-store observations on merchandising, servicescape and customer service. Data also came from interviews with managers in Carrefour and Tesco combined with competitor observations (REF). The following

RQ1: What are the differences among the Western, Hybrid and East-Asian formats?

### Wet / Traditional Market

All food related shopping is done in the wet market. The market is lit with naked light bulbs and cooled with fans in the summer. Customers use delivery baskets and crates. Customer



among the Western, Hybrid

et: open sides, lit with naked light bulbs, produce in piles on display trays, motions or bargaining.

Figure I Wet (traditional market)

First time foreign visitors often observe that it is dirty, messy and chaotic. This impression leads marketers to assume consumers wish to migrate to a modern format: hypermarkets (Trappey, 1997). However, the wet market has enduring associations for Chinese customers that limit migration (Goldman et al., 2002, Ho, 1999). Formats with a Western influence attempt to replace the traditional markets in Taiwan.

### Western Format

Two hypermarket businesses in Taiwan show a clear Western retailing format: Tesco and Carrefour. Tesco entered Taiwan in 1998. They brought their successful European experience that involves a systematic customer focused approach. Tesco opened five stores by mid-2006. High costs made a planned twenty stores unattainable (Sue-feng, 2006). Managers failed to realize the Taiwan market was characterised by many small suppliers (Chung, 2001). Future expansion, in similar situations, would include appropriate distribution and rapid development of hypermarket sites to realize profit margins more quickly (Orchard-Smith, 2006).

During the same eight year period, Carrefour aggressively expanded from 22 stores to 38 (Carrefour, 2006). They made improvements that included service, store cleanliness, quality of fresh produce, and opening hours (as did RT-Mart). In 2005 a

cash and asset swap that enabled Carrefour to acquire Slovakia operations.

The Tesco's servicescape was well ordered, neatly priced and organized. The services were similar: comprehensive product range and development. Tesco's in-store environment was noted by the researchers as one of the



in, Tesco took over Carrefour's

firm signage, and wide aisles lined with products. The researchers' expectations in UK and Taiwan were similar. This research guided store visits to frequent stores visits one of the

Figure II Tesco physical environment and products

A focus on service meant minimum check-out times (Orchard-Smith, 2006); the customer service desk placed directly in the customer's entry-exit path offered competent friendly staff to handle queries (e.g., returns and safe keeping) (Sue-feng, 2006).

### Hybrid Format

The first Carrefour store in Taiwan was a hybrid format. The distribution conglomerate. They got a local partner, distinguished it from Tesco through aggressive management of prices (Chao and Tsuchiya, 2006).



an based food manufacturer and distributor, facilitated by input from its local partner. "Everyday low prices", achieved through long-term relationships (Chao and Tsuchiya,

Figure III Carrefour physical environment and products

Carrefour prioritized sourcing for low price merchandise over service levels (Carrefour in store manager Taiwan, 2007). In-store observations showed staff often talking amongst themselves and only offering customer support when a sale was likely. These observations reflected the hypermarket's data that showed customer perceptions of staff friendliness and quickness were consistently lower than other measures (Carrefour, 2006).

### East-Asian Format

RT-Mart, a subsidiary of the Taiwan Reuintex group, opened in 1996. By 1998 they had 23 stores in Taiwan: the lack of Western influence was clear. Management focused on low priced products and services. The local product range was the country's second largest hypermarket chain in a total of 25 stores by 2005 (RT-Mart, 2005).

RT-Mart products ranged from pre-prepared foods (e.g., Sushi) with meat and fresh fish sections. The store was busier than other stores with customers focused on fresh produce, has been successful and contained an erratic display of products on narrow aisles and contained an erratic display of products on narrow aisles which forced customers to squeeze past in single file.



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ce areas combined pre-prepared foods and fresh produce. The researchers observed this area was more successful than other sections. This strategy, focused on local products at aisle ends which forced

Figure IV RT-Mart Physical environment and products

RT-Mart service innovations included a flexible returns policy, self-check out and a simple drive-thru. The latter enabled customers to select items and staff put them in the car (Chen, 2005). These formats are diverse. The researchers focus on customer perceptions of retail service quality and reactions to these formats.

## PHASE 2 EXPLORING SERVICE QUALITY AND REFERRAL INTENTION

Investment in service leads to positive customer assessments of service quality that influences post-purchase behaviours. Service quality consists of three elements: outcome, interaction and physical environment quality (Brady and Cronin (2001).

These three elements are in the generic approach to measuring service quality: SERVQUAL (Parasuraman et al., 1988). SERVQUAL adapts to specific measurement situations Parasuraman (1988). To fit the hypermarket situation the retail service quality scale adapts SERVQUAL Dabholkar et al's (1996). This scale measures consumers' perceptions of service thereby overcoming measurement limits of SERVQUAL (quantifying expectations-perceptions gaps) (Buttle, 1996).

The intuitive links between service quality, behaviors and profits remains unclear (Durvasula et al., 2004, Zeithaml et al., 1996). However, within these relationships one important link is relevant to this study: that of quality and referral. A direct relationship exists between service quality and referral. Positive perceptions of service quality stimulate referral. Negative perceptions create negative word of mouth (Bloemer et al., 1998, Cronin et al., 2000) (Boulding et al., 1993). This relationship exists for (Western) hypermarkets (Dabholkar et al., 1996) and for Chinese customers of department stores (Liu et al., 2001). However, for Chinese customers negative perceptions of quality has little impact on negative word of mouth Liu et al (2001).

The extant literature and insights from phase one leads to:

H1 The perceived service quality of the Western format is higher than both the hybrid and the East-Asian format.

H2 The Western format has the highest level of referral intention of the hybrid and the East-Asian format.

## **METHOD**

This study implements Dabholkar et al's (1996) multi-dimensional Retail Service Quality Scale. The measure combines 17 items from SERVQUAL with 11 retail specific elements to form the five dimensions of physical aspect, reliability, personal interaction, problem solving, and policy. This scale is appropriate for a Chinese cultural setting Siu and Cheung (2001). Siu and Cheung (2001) deleted several items (including telephone interaction, parking, and store credit card) from the scale. In Taiwan these items have relevance so pre-testing includes all of the original 28 items.

### **Pre-Testing**

The scale was translated and then back-translated (English-Mandarin). After adjustments, twenty-two regular hypermarket patrons tested the instrument. Three sets of survey forms incorporated their feedback. The questions in each set were identical but targeted to one of the hypermarkets.

### **Sample**

Sampling adopted a purposive snowball technique. Survey administrators were volunteers from an MBA program in a national university. Administrators, who were all in mid-management positions, were specifically instructed to seek respondents at work i.e., *not* students. Additionally, the researchers instructed them to identify which of the three stores potential participants regularly patronized. Regular patrons of one of the three stores of interest were given the survey. The cover instruction sheet also clearly stated that qualified participants were shoppers in the specific store. The instrument prominently displayed the related store's logo and the questions used the store's name.

The researchers supplied each administrator with packages of questionnaires, instructions and gift certificates. Instructions given to administrators focused on matching respondents to the store they frequented, management of gift distribution, collection of completed surveys (prepared envelopes addressed to the researcher). A total of 450 survey packages were prepared and divided equally between each store (i.e., 150 per hypermarket). The result was 250 completed and usable survey forms. Surveys distribution occurred in May 2006. Carrefour and Tesco agreed that included former taking control of latter's stores stores by June 2006). In turn Tesco took over Carrefour's Slovakia operation. This arrangement was the result of a protracted dialogue and during time Tesco's operations were "business as usual" meant customer saw no visible effects (Orchard-Smith, Personal Communication). The researchers were confident respondents were unaffected by impending ownership changes.



We next consider the differences in recommendation behaviour between the three formats. We test for correlation between reported recommendation levels and at different factor levels in the retail service quality model (see Table II) Dabholkar et al's (1996).

Tesco's high level of perceived service quality (in significant areas of difference) leads to a lower degree of referral intention than for the starkly different RT-Mart. The only factor that does not fit the pattern (RT-Mart highest, Tesco lowest) is policy and specifically. This relates to the 24 hour opening policy. The overall result is unexpected and rejects our Hypothesis 2.

	Number of questions	Correlation with recommendation			
		Construct reliability	Tesco	Carrefour	RT-Mart
Overall scale dimensions	24	.94	.56	.62	.70
Physical aspects	6	.85	.51	.56	.66
Personal interaction	9	.91	.48	.54	.66
Problem solving	3	.86	.56	.46	.53
Policy	4	.75	.84	.82	.77
Reliability/ Promises	2	.85	.38	.50	.42
Sub dimensions					
Appearance	4	.84	.47	.54	.63
Convenience	2	.70	.47	.56	.60
Inspiring confidence	3	.84	.45	.48	.60
Courteous/ helpful	6	.87	.46	.53	.62

Note: All correlations significant at  $p < .001$

Table II Correlations between recommendation and the quality dimensions for the three stores

## DISCUSSION

Other work establishes a norm of a direct relationship between service quality and behavioural intention (Dabholkar et al., 1996). However, the results of this study do not support this. The cultural values of Chinese customers can explain this. Siu et al (2001) also find that service quality is a poor predictor of behavioural intentions for Chinese customers of a UK headquartered (i.e., Western) department store in Hong Kong. Only policy significantly correlates with referral intention and this single item fits with previous work (Dabholkar et al., 1996, Siu and Cheung, 2001).

We find that physical environment, courtesy, and inspiring confidence are most significant in generating referral intentions for the East-Asian format. The physical environment of the Western store indicates a cultural preference for planning (Trompenaars and Hampden-Turner, 1997) that reflects (Western) customers well ordered shopping trips that centre on shopping lists (Sue-feng, 2006). In contrast, Chinese customers are more impulsive and rarely make lists, especially since they shop frequently (McDonald et al., 2000). They are very price conscious and spend more time than American customers evaluating their purchases (Ackerman and Tellis, 2001) and actively seeking bargains (Sternquist et al., 2004). RT-Mart's physical environment reflects this preference; large discount price signs and promotional displays draw customers' attention as they meander through the store and dig into bargain racks. In contrast, aisle signage and in-store directions are minimal.

Key to customer confidence is to staff interaction and courtesy. Much staff behaviour in Tesco is process driven and scripted. For example, if a customer needs help finding an item, staffs takes them to the product and after checking satisfaction resume their previous activity (Mahesh and Stanworth, 1995). This is typical of the design of in store service systems and responds to customers who desire an efficient, organized shopping experience.

For Chinese customers, confidence and courtesy may come from other sources. Chinese customers appear to rank polite and friendly service over reliability of delivery (STANWORTH)(Feinberg et al., 1995). The SERVQUAL (Parasuraman et al., 1988) constructs of assurance and empathy are incomplete for Chinese customers (IMRIE). The *Confucian Relational Ethic* addresses this short coming through three constructs of *sincerity*, *generosity*, and *courtesy/politeness* and 27 contributing sub themes Imrie et al (2002). Our observation in the wet market shows these themes emerge in in stall-holder-customers contact. Interviews in this setting typically note: "...Supermarket employees don't have the time to listen to customers complain about life, and they *can't bargain with them*. It's no fun going to those places to shop" (emphasis added) Trappey's (1997).

*Rena* (熱鬧) plays an important role Chinese customer preference. Literally it translates as 'hot and noisy' environments that encapsulate the dimensions of *crowd*, *activity and sound* (Pan, 1993). Customer prefer busy locations to quiet ones and queues become a proxy for evaluating quality as Chinese people follow quickly where others lead (Warden et al.). Wet markets are renao locations and represent socialized preferences (Chen and Warden, 2007). Chinese customers pay great attention to freshness (Schvaneveldt et al., 1991); looking and even touching plays an important part in assessing food and the wet market facilitates this (Ackerman and Tellis, 2001). Consequently freshness and quality of products associate with these retail formats (Hsu and Chang, 2002).

RT-Mart incorporates the familiar service approach and servicescape of the wet market which we see as inspiring customer confidence. As staff interacts with customers, the aim is to create an interested crowd and the whole process hedonistically excites and encourages purchase (Warden et al.).

## CONCLUSIONS

Chinese customers perceive hypermarket service quality as best in the Western format and lowest in an East-Asian format. However, the referral intention in the East-Asian format is higher than that of the Western format. This unexpected result reflects the East Asian format's effective fit to local preferences, for physical environment, courtesy and inspiring confidence. This leads to two conclusions for, first, management and second, retail service quality measurement.

This papers start with Lee and Stan's hypermarket visit. Lee, as a Chinese customer finds it relaxing, comfortable and an engaging shopping experience. However, for Stan it has familiar elements but is uncomfortable chaos. For Western managers, 'right', based on Western home country norms, becomes slightly 'wrong' for delivery of Chinese retail service quality. Creating attributes that fit an East Asian setting is difficult for Western managers Ellis et al (2003). Our interviews support this: "RT-Mart is a shit heap... It looks more like a wet market" (Senior Manager, Western format). Design of service delivery systems should respond to influences of culture (Stauss and Mang, 1999, Warden et al., 2003) by including attributes important to a Far East setting (Winsted, 1997, Imrie et al., 2002). This study reveals servicescape design and the ability to inspire confidence are important but misunderstood. However, the Western retail service quality measurement instrument may merely indicate an underlying problem: the limits of measurement.

## LIMITATIONS AND AREAS FOR FURTHER RESEARCH

A lack of cultural equivalence for the retail service quality scale may have influenced the result (Smith and Reynolds, 2002). Many studies of service quality in non-Western settings use SERQUAL Parasuraman et al's (1988). However, this "naively" fails to take account of cultural influence on service quality assessments (Imrie et al., 2002). The RSQS (Dabholkar et al., 1996) draws from . Consequently, Imrie's et al's (2002) naiveté trap applies. Further research could useful explore meanings and methods of measurement of retail service quality for Chinese customers.

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