

Future of Organised Retailing in India - The Critical HR Issues

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ABSTRACT

According to the Global Retail Development Index (GRDI) published by A.T. Kearney (2012), India is the 5th most attractive retail destination in the world. The retail industry in India has been largely fragmented with small businesses dominating the retail landscape, with very few large players having multiple retail outlets. However, in the last few years, the industry has witnessed a significant growth in the number of large retailers having a chain of outlets across the country. This growth in the organised retail sector has driven primarily by large Indian retail organisations and conglomerates. With the government reducing the restrictions on foreign participation in Indian retail business by increasing the FDI cap on both single and multi-brand retail outlets, the industry is likely to see an explosive growth in the organised retail sector which accounts for only 8 percent of the total industry. With more foreign retailers poised to enter into the country, one of the key issues that the industry may face is finding the right quality of manpower. Literature suggests that in an industry which is characterised by players offering similar kinds of product assortments at similar price levels, success would be governed by the quality of service, which entails employees having the right skills and attitudes for offering quality service. Therefore, the two key issues that may be of importance for retailers are levels of skills and the motivation of the employees. However, according to the National Skill Development Corporation (NSDC, 2009), a significant skill gap exists in the industry, which may widen further in the years ahead, leading to greater challenges for organisations. This paper highlights some of the challenges and issues

which characterise the industry in India, and suggests how companies could look at these challenges and seek ways to overcome these challenges.

KEYWORDS

Retail Industry • HR • Quality of Service • Skills and Motivation

1. INTRODUCTION

In recent years, the retail industry in India has been a subject of discussion both nationally and internationally, because of the potential growth of the organised retail sector and the liberalised policies of the government towards attracting foreign direct investment (FDI) in single and multi-brand retail outlets. According to the Global Retail Development Index (GRDI) published by A.T. Kearney (2012), India is the 5th most attractive market for retail. Despite this positive outlook about the retail industry, opinion in the country is divided regarding the merits of allowing foreign players to enter into the Indian market. A heated debate rages in India amongst those who support and those who oppose the decision of the government to allow Foreign Direct Investment (FDI) in the retail sector. The supporters argue that entry of foreign players, who are far ahead of in the retail development curve, would bring in several best practices that would contribute to the development of backend supply chain infrastructure; performance improvement; better returns for farmers etc. But those who oppose argue that it would negatively affect the small retailers, who would find it difficult to compete with large global players, thereby leading to significant loss of income and employment. Despite these opposing views, if one considers the way the organised retail industry in India has grown in the last few

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years, driven primarily by large Indian retail organisations and conglomerates, one can safely assume that the recent decision by the government of India about raising the cap in FDI in retail is likely to see an explosive growth in the organised retail sector which accounts for only 8 percent of the total industry as of now.

Considering the rapid growth that the retail industry is expected to witness, the projected human resource requirement for the industry is 13 million by 2018 (NSDC, 2009). While the numbers may look very encouraging, a fundamental issue which needs to be considered is the level of skills that the retail employees are expected to have. Skill deficiencies can be due to lack of adequate number of potential people who has the skilled required for a particular job (Frogner, 2002); and/or the inadequacy of skills required for performing existing tasks by employees (Green et al., 1998). In case of the former, recruitment becomes a challenge. This may be further aggravated by the challenges already plaguing the industry, like high staff turnover and poor image of the industry as a potential career destination (Hart et al. 2007).

Several studies indicate that quality of human resources have a direct impact on the performance of a firm. This would be more so in case of the retail industry which requires direct interaction with customers and ensuring that its operations are aimed at meeting the requirements of the customers. Customer handling skills have been found to be one of the most important skills which retail employees should have (Hart et al. 2007).

The structure of the paper includes a brief discussion about the retail sector in India, followed by the objectives of the research. This is followed by a literature review which highlights some of the pertinent issues facing retail organisations in general, including the impact of people on retail service quality. We then focus on the specific issues pertaining to human resource management in India. Finally, we offer our recommendations for retail organisations in developing their human resource policies to get the best out of their workforce.

2. RESEARCH BACKGROUND

A PricewaterhouseCoopers report (2011) suggests that the Indian retail industry is worth US\$ 350 billion with the organised sector accounting for only 8 percent of the total retail market. However, the growth of modern retail is quite significant at CAGR 15 to 20 percent. The size of the Indian retail market is expected to become USD 750-850 billion by 2015 (Deloitte, 2013a). The high rate of growth of modern retail, coupled with growth in per capita income and urbanisation augurs well for the industry. The organised retail segment has been driven by the entry of large busi-

ness houses like Reliance group, Tata Group, and Aditya Birla group into the retailing business. Yet, the Indian retail industry as polarized as is the industry in the UK. Outlining the nature of the retail industry in the UK, Hart et al. (2007) observe that the industry is “polarized”, with a large majority of small retailers at one end and large retail chains at the other extreme. The Indian retail industry is also characterized by the presence of large number of small businesses, classified as unorganized retailers, with a small proportion of large retail chains or organized retailers. Considering that the share of organised retail being only 8 percent, more than 90 percent of the retail business is accounted for by small retailers. If the average size of these businesses is taken into account, the number of such retailers becomes very high.

As retailers in both the organised and unorganised sectors facing competition from other retailers in both the sectors, they must find ways to be relevant to their customers. In order to compete in a highly competitive environment, retailers may essentially be required to create differential advantage (Swoboda et al. 2007). Quality of service is an important differentiator in retailing (Siu and Chow, 2003; Sparks, 1992), particularly when there is little difference between the nature of assortment and prices offered by retailers (Homburg et al., 2002).

2.1. OBJECTIVES OF THIS RESEARCH

This paper identifies some of the human resource management (HRM) issues which would be critical for the success of retail industry in India. Some of the issues in the retail industry arise out of its characteristics of being a service. Therefore, the objectives of the study were

- to identify the existing and future challenges faced by the retail industry in India
- to identify the aspects of human resource management that would be important considerations for retail organisations operating in a highly competitive marketplace
- suggest ways in which organisations can address these issues and challenges

2.2. LITERATURE REVIEW

Although, in India organised retail is still at its infancy, globally the environment for retail has changed significantly in the wake of decentralization, increased competition and growing complexity of customer shopping behaviour (Hart et al., 2007). To remain competitive, having the right skill amongst employees is of significant importance. Despite the increased reliance on technology in recent times, the human elements cannot be completely ignored. Exploitation of technology would still require human intervention and can have an impact on overall customer experience with retail

organisations.

As the retail industry matures and competition intensifies, retailers would require gaining differential advantages to stay ahead of competition. Homburg et al. (2002) observe that often retailers' assortments and prices are indistinguishable from each other. A closer look at the organised retail industry in India would suggest that the above observation holds true. In the retail industry, one of the factors which have been found to have a significant effect on store choice is service quality (Finn and Louviere, 1990).

In the context of retail Gagliano and Hathcote (1994), classify service as store service and sales service, where the former includes after sales service and exchanges/ returns, while the latter include employee competence, friendliness and helpfulness). In their intersectoral study of retail organizations having representation from five sectors, Swoboda et al. (2007) found that even in sectors where self service is the accepted norm, competent and friendly staffs are important.

Swoboda et al. (2007), based on their review of literature highlight the importance of people related service attributes in retail organizations, which consumers use to evaluate retailers. Some of the attributes that have been identified by them include sales-clerk service (Mazursky and Jacoby, 1986); Customer Service (Barich and Srinivasan, 1993); transaction effectiveness and responsiveness related to willingness of employees to help (Teas, 1994); and professional and friendly staff (Gomez et al., 2004). Studies by Babin et

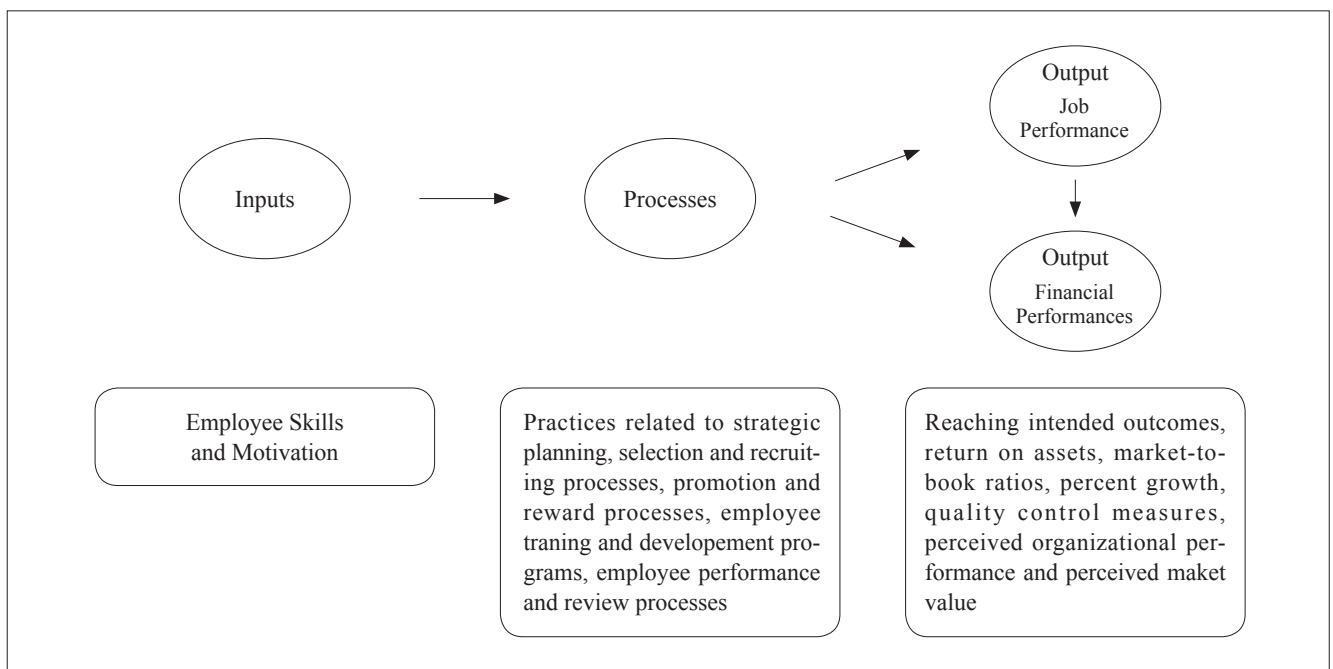
al. (1999) and Wang and Netemeyer, (2004) indicate that sales person competency in providing service is a critical success factor for retail organizations. Sweeney et al. (1997) found that perceived service quality had greater impact on the willingness of consumers to buy more, as compared to product quality perception. An important attribute of service quality is the general presentation and friendliness of the employees (Shao et al., 2004).

Literature on services emphasise the need for developing and maintaining customer relationships for long term benefit of organisations. However, Hauser et al. (1996) observe that organisations find it challenging to managing customer relationships. Customer relationship management attempts to achieve higher levels of customer loyalty. Anderson and Srinivasan (2003) report that loyal customers may be ten times more worthy than an average customer. Loyalty is based on the way consumers perceive service quality. In this context, front line employees can play a significant role in shaping this perception (Scotti et al., 2009).

Value creating takes place at the point of employee-customer interaction. HRM policies and practices are crucial in achieving the goal of making employees effective in their dealing with customer requirements (Conduit and Mavondo, 2001; Ruekert, 1992).

Ferguson and Reio (2010) propose a model linking the various elements of HRM systems and firm performance, as shown in Figure 1. The model identifies the inputs, processes and the possible outcomes in terms of job and

FIGURE 1: HRM system model



SOURCE: Ferguson and Reio (2010), p. 473

financial performance. The HR inputs include employee skills and motivation; and the processes pertain to the HR processes and systems.

Some of the employee skills which can impact sustainable competitive advantage of a firm may include writing; reading; arithmetic; knowledge of computers; critical thinking; problem solving; etc. (Ferguson and Reio, 2010). While these skills are important, their effectiveness depends on the level of employee motivation (Delaney and Huselid, 1996). From the human resource management perspective, the extrinsic factors which can influence motivation include payment for a particular skill; performance related pay; payment based on organisational level, and job-based pay (Chen and Hsieh, 2004).

One of the major concerns in the retail industry is the significant skill gaps or shortages which exist in the industry. Skill gap may not only indicate the lack of adequate manpower, but also include deficiency of the appropriate skill required for conducting the particular tasks (Green et al., 1998). For an industry as a whole, availability of the right skills can enhance the standards of performance. It has been found that right skills and competences can enhance organisational effectiveness and improve employee satisfaction (Paulsson et al., 2005), which in turn can enhance performance of the firm.

As the government relaxes the norm for FDI, more international players are likely to enter into the country, leading to higher levels of competition among the players. With the growth of the industry, the demand for skilled manpower would also increase. Table 1 shows the projected human resource requirement in the Indian retail industry.

It is clearly evident that by the year 2022, the requirement for retail employees would be highest for the Food and Grocery industry; Consumer Durables, Home Appliances and Equipments; and Clothing, Textiles and Fashion.

A majority of the retail employees are engaged in sales and customer service roles (Hart et al., 2007). As a result the need for low level skills is much higher as compared to higher level skills in the industry. Low skills are also linked to low pay structure, which contributes to the negative image of the industry with respect to career choice amongst potential employees. It is ironical that people who are most likely to impact customer experience in retail organisations are the ones who have the lowest levels of skills.

In their study, Hart et al. (2007) found that retail employers identify two fundamental skill gaps amongst employees, viz. attitude gap among young people and gap in management skills. The first gap is of major concern because attitudes and behaviours are very important skills as people with right attitudes can be appropriately trained for achieving the organisational goals. Imparting technical and product knowledge is much easier than bringing about an attitude change, which may require focus on more fundamental issue of educating people and preparing them for a career in a demanding service industry like retail.

The transformation of the above human resource inputs are brought about by human resource practices, which are distinct activities, processes, and functions that attract, develop and maintain human resources of the firm (Lado and Wilson, 1994). Barney (1991) describes HR practices as intangible sources of advantage for firms. This finds support from studies which indicate that right recruitment practices; and training and development practices have a positive impact on the performance of firms (Terpstra and Rozell, 1993; Holzer et al., 1993).

Coupled with recruitment and selection of appropriately skilled employees, retail organisations should also focus on reducing staff turnover. Hurst and Good (2009), while quoting a study in the US, report that the voluntary turnover rate in the US retail industry is 34.7 percent. The reason for such

TABLE 1: Projected human resource requirement ('000)

	2008	2012	2018	2022	Incremental
Clothing, Textiles and Fashion Accessories	965	3,361	12,165	21,150	20,185
Jewellery and Watches	199	773	3,440	7,050	6,851
Footwear	255	861	3,440	7,050	6,795
Pharmaceuticals	114	454	1,909	3,525	3,412
Consumer Durables, Home Appliances and Equipments	312	1,758	11,675	28,200	27,888
Furnishings, Utensils, Furniture-Home and office	85	703	6,057	14,100	14,015
Food and Grocery	483	3,976	32,210	88,126	87,643
Misc	426	1,499	4,813	7,050	6,624
Total	2,838	13,385	75,709	176,525	17,341

SOURCE: NSDC (2009: p.44)

a high turnover is the “boundary spanning” nature of the positions and the extensive interactions which are required across departments leading to role ambiguity and conflict. One of the ways of recruiting and retaining high calibre staffs is to build a strong retail brand (Lindsay, 2005).

Although traditional HR functions like staffing, training, appraisal and compensation are important aspects for a firm to consider, there is a greater shift amongst firms to look at strategic priorities like “team-based job designs, flexible workforces, quality improvement practices, employee empowerment and incentive compensation” (Chang and Huang, 2005). Often, Strategic HRM (SHRM) is the term used to explain the above shift in focus of firms. SHRM is defined as by Wright and Snell (1991) as organisational systems for achieving sustainable competitive advantage through people.

2.3. SERVICE INDUSTRY CHARACTERISTICS AND IMPLICATIONS ON HR

Services are characterised by intangibility, perishability, heterogeneity, and inseparability (Regan, 1963), which lend to challenges in managing services. For example, intangibility of services makes it difficult for the service provider to communicate its offers to customers (Redman and Mathews, 1998). Similarly, inseparability of services indicates that service encounter can build or damage customer relationships. If a firm is to overcome the challenges posed by the inherent nature of services, people have to play a major role in this. Arrowsmith and McGoldrick (1996) identify the HR implications arising out of the characteristics of the service industry, as shown in Figure 2.

The service industry being highly labour-intensive, is characterised by low levels of pay and limited opportunities for career development. Reducing staff is one of the ways of keeping costs low and increase productivity. Due to demand variability and extended work hours, part time employment could be a preferred. A bigger challenge perhaps form most companies is to have higher levels of motivation and commitment among front line staff, for maintaining high quality of service.

3. METHODOLOGY

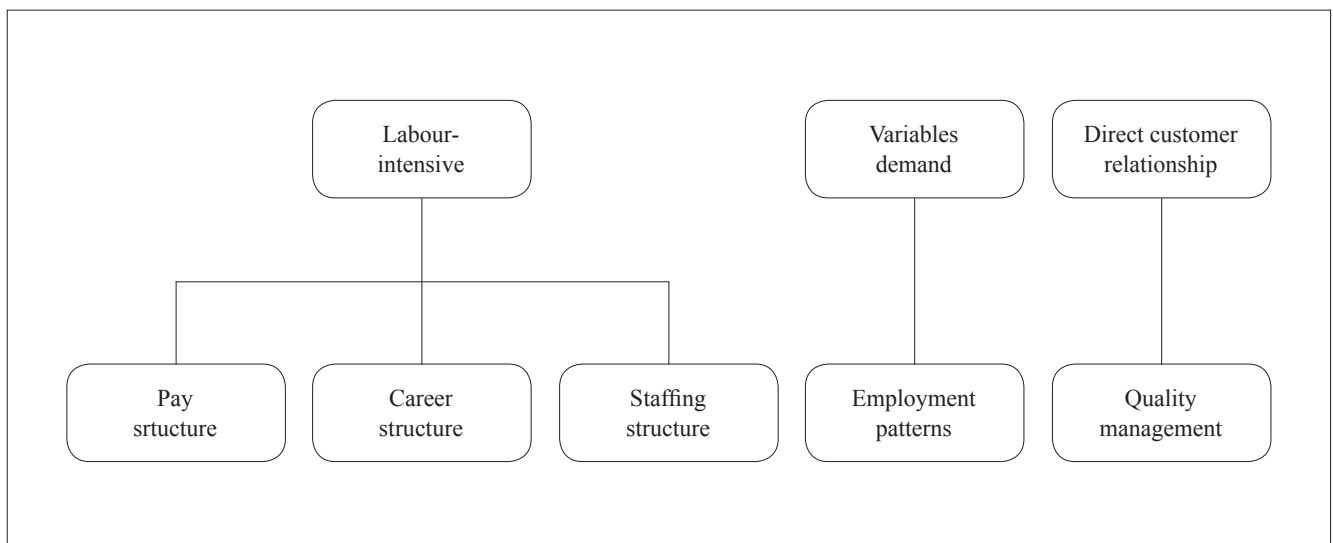
The research is based on secondary data and involves extensive review of literature on the concerned area in order to highlight the present scenario of Human Resources in the organized retail sector. For this study, the data has been collected from various published sources such as annual reports, books, journals and current electronic publications (websites).

3.1. CHALLENGES FACING INDIAN RETAIL

Although the organised retail industry has been growing at a rapid pace in India, there are several challenges which plague the sector (Deloitte, 2013b). Some of these challenges are briefly discussed below.

- 1) The Indian retail market is heterogeneous in nature, with wide variation in the education, behaviours and attitudes of customers. The heterogeneity of the market results in coexistence of both large and small retail outlets. However, the assortment of different retailers can vary, and so can the prices between large and small

FIGURE 2: HR implications of service industry characteristics



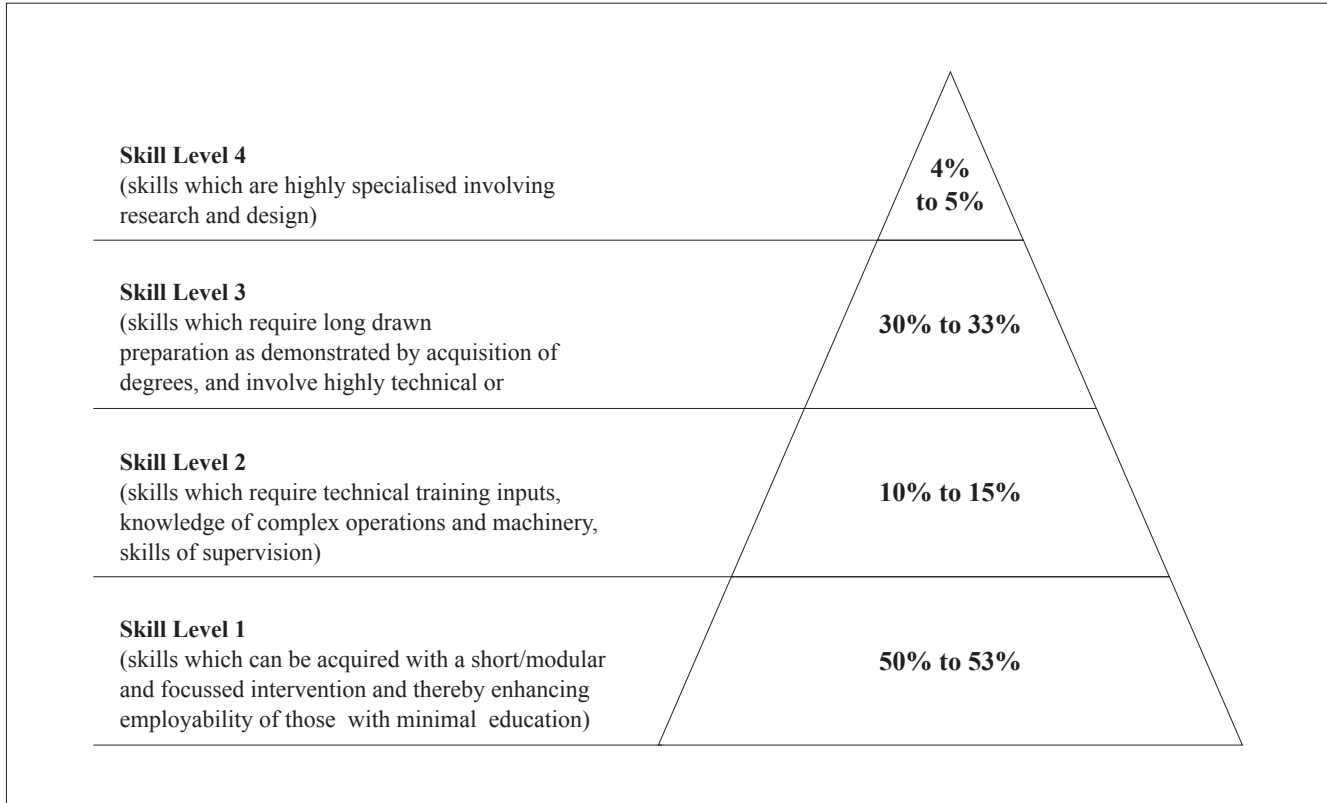
SOURCE: Arrowsmith and McGoldrick (1996)

- players.
- 2) Lack of physical infrastructure, which leads to inefficient supply chains, resulting in higher costs of operations. Although supply chain is an important target for cost savings for organisations, the benefits of better supply chain go to large players in the short to medium term and not immediately benefit small players.
 - 3) Lack of quality real estate space and high cost of rentals. This is a recent phenomenon. As the organised retail market continues to expand, mostly in the metro cities, the demand for the right location for retailers has resulted in high demand for commercial buildings, thereby increasing the rental costs in these areas. However, many of the large established players in the industry are spreading themselves out in smaller towns and cities.
 - 4) Challenging regulatory issues like lack of uniformity of tax structure across various parts of the country, and comprehensive licensing requirement for setting up of new stores. For example, although the Central government has enhanced the FDI limit in single and multi brand retail, the implementation of this has been left in the hands of the state governments, some of who are opposed to the idea.

- 5) Lack of quality talent, which is widened by employment opportunities available in other sunrise industries like IT and ITES; and poor perception about career in retail amongst prospective employees
- 6) High rate of attrition. High employee turnover in the retail industry is a phenomenon which is common to many of the developed nations, and the trends are similar to those observed in other parts of the world.
- 7) Lack of focused retail education. The poor image of the industry as an attractive career choice may have contributed to this lack of focus on retail education. The unique work challenges like extended working hours, weekend working etc. may also have acted as a deterrent to potential employees, particularly in the managerial levels. However, this trend is changing as retail offers exciting career opportunities these days.

While many of the challenges outlined above are macro in nature, there are some which can be adequately addressed by the industry as a whole and organisations in particular. Some issues like poor image of the industry as a career option, high attrition, and lack focused education can be addressed at the macro level. This is where HRM policies and practices can become useful for a firm.

FIGURE 3: Skill pyramid in organised retail



SOURCE: NSDC (2009: p.46)

One of the factors, which require closer look by retailers, is the lack of available skills, at various levels. The distribution of retail employees in India across various skill sets significantly differ. Figure 3 shows the pyramidal structure of the distribution of skills among retail workers. It can be seen that majority of the people in the industry are at the bottom of the pyramid, with respect to the required skills. These are the skills which can be easily acquired with minimal training, but the volume of people involved can make it a challenging task for organisations. The level 1 skills, though may be low in terms of the skill hierarchy, are most crucial as they are the skills which would determine the quality of service encounters and influence the customer satisfaction levels. The second most important group of skills is at level 3 in terms of the number of people involved. These are higher level skills and would require a different approach from a HRM process perspective to manage.

In addition to skills, the other issues that the industry may have to seriously consider are the high level of attrition among retail employees and negative perception about the industry as an employer. Attrition can result from factors like employment opportunities available with other industries; the tough work environment; low levels of pay; lack of a clear career path etc. Some or all of these issues can be addressed by individual organisations. The success in overcoming these challenges would depend on the innovativeness of the HR practices that firms adopt in a competitive marketplace, where they not only compete for business but also for the right people.

3.2. RECOMMENDATIONS

With intensifying competition in the organised retail industry, competition is likely to shift from being entirely price based to more people based. People quality and productivity are going to be the two key dimensions of retail success in the future. As a result, human resource management is going to play a very important role. While the focus for most of the players in the organised retail sector in India has been on achieving efficiencies through operational cost reduction, negative fallout of this strategy may have been a compromise on the quality of manpower. However, in future this scenario is likely to change, primarily because of the competition for scarce human resources and the need for differentiating based on quality of service. This would be more relevant as customers get more sophisticated and demand better quality of service from retailers.

Redman and Mathews (1998) suggest a research agenda for evaluating the link between Total Quality Management (TQM) in services and human resource management using a modified version of the “HRM bundle” proposed by Purcell (1996). The authors then make several propositions based

on these elements of the HR bundle. Borrowing from the study of Redman and Mathews (1998), the various strategies that retailers in India may use with respect to the “HR bundle”, are outlined below:

Recruitment and selection

Since quality of the staff is an important determinant of the quality of service delivery, the recruitment and selection process should be able to identify the right attitude and behaviour of the potential employee. Some of the key dimensions that may be assessed should include problem-solving and interpersonal skills; personality and work values (Redman and Mathews, 1998).

An important issue that Indian retailers need to address is to aim at achieving the right fit between the employee and the organisation. Failure to do so may lead to higher level of attrition.

Retention

In an industry where standards of quality are still evolving, retention of high quality employees can be an important issue for most retailers, as retaining key employees can significantly impact the performance of an organisation. Poor employee retention and loyalty is generally associated with absenteeism, theft, and low productivity (Withley and Cooper, 1989). High employee churn can clearly impact service standards in a customer facing business like retail.

Training and development

Training and development are important components of employee development in retail organisations. Keltner and Finegold (1996) observe that the reluctance to investing in quality training in the service industry explains its high staff turnover.

Customer orientation is still a questionable attribute among retail employees in India. Probably the reason for this is the lack of formal training and experience. By focusing on these two aspects, firms can achieve increased customer orientation. It is also important for retail firms to impart the feeling among employees that they are part of a large organisation, and hence they are expected to perform their duties in such a way that organisational objectives of achieving customer satisfaction is achieved.

Firms should devise a formal approach to training and development. Often firms do not accord adequate importance to training, either because they feel that training would reduce the productive number of hours or days of the employee, or a particular job is easy to learn and hence training can be on the job. This can be a fallacious assumption, because the impact of untrained employees can be severe, with high levels of customer satisfaction. In addition to training, the focus should also be on employee develop-

ment. The repetitive and tedious nature of the job can lead to higher levels of dissatisfaction among employees. One way of addressing is the regular job rotation and imparting of new skill sets appropriate for higher level jobs, thereby moving from one level of the skill pyramid to another.

Appraisal

It is argued that employee empowerment is required to achieve customer care goals (Bettencourt and Gwinner, 1996). However, the concept of employee empowerment must be understood by the different levels of employees in the organisation. Individual performance based on set standards may not be the appropriate evaluation criteria. Team based performance can be an appropriate method of measuring performance. Focus on teams can help employee motivation and also lead to higher individual productivity due to peer pressure and also with help from other group members.

Compensation

This is one of the most sensitive issues which organisations have to deal with. Because of the pressure on margins and high cost of retail, firms may focus on reducing manpower cost. As a result the compensation level can be generally low, is typical of a labour intensive service sector. However, with dearth of quality talent and attractive employment opportunities available in other sunrise industries, the retail industry is not likely to attract the right talent if compensation structure does not match the aspirations of people. Although higher compensation may still not completely eliminate attrition, it would attract the right people into the industry. The compensation structure should adequately reflect the skill level and the job position that an employee has.

Work Stress

Retail industry jobs, particularly the customer-facing ones, can be quite stressful with long hours and constant requirement for standing on the feet. While in most cases these issues cannot be immediately addressed, firms must try to devise a more stress free work environment, wherever possible. One possible way could be define the hours of work and engage more part time employees to fill in for the additional number of hours of operation.

Engagement and communication with employees

To get the best out of employees, firms must devise ways to engage with customers and constantly communicate with employees. Since the work can be stressful, constant communication can help in identifying early signs of stress or dissatisfaction. This can help organisations to immediately address the issue and not face the prospect of employee

leaving an organisation for an issue which could be resolved with timely intervention.

Improving the image of the industry

This is perhaps the most important goal for the industry if it is to attract appropriate talent. The industry must pose itself as an attractive employment option for people with different educational level. It is not necessary that since most of the jobs in retail requires basic levels of skill, people with higher level skills are not required. For driving any organisation, managerial skills are equally important. To attract talent from some of the best educational institutions and from the industry, the retail industry must position itself as a preferred employment destination. After all retail is never dull, as every interaction with customers can provide a learning opportunity for an employee.

3.3. FUTURE RESEARCH

The existing study has tried to identify the key challenges facing the retail industry in India, and the possible course of action that retailers may take to address the challenges. However, this phenomenon can be further explored, particularly at a time when the Indian retail industry is poised for significant growth while the industry is plagued with severe shortage of skills. Future studies may study the impact of HR interventions on employee motivation and the consequent impact on consumer satisfaction. Other studies may also look at specific segments within the retail industry and highlight how they differ from each other in terms of their HR policies and other employee related issues like having the right skills or arresting employee turnover.

4. CONCLUSION

As retail is an industry in transition, there are many aspects of retail which may require considerable attention from organisations. For the Indian retail industry which is at the threshold of explosive growth, one such issue which can be of considerable importance for the future of the industry is the quality of manpower and the associated human resource management issues.

Two of the issues which this research has identified are skills and motivation of employees. As we have discussed in this paper, attrition is one of the biggest challenges for retail organisations. Similarly, the long working hours and “boundary-spanning” roles that an employee plays can lead to dissatisfaction with the job. This may require constant motivation of people, to continue to perform in a way such that consumers perceive the quality of service rendered to be high.

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