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STATEMENT OF THE PROBLEM

OBJECTIVES

HYPOTHESES

RESEARCH METHODOLOGY

RESULTS & DISCUSSION

FINDINGS

RECOMMENDATIONS/SUGGESTIONS

CONCLUSIONS

SCOPE FOR FURTHER RESEARCH

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APPENDIX/ANNEXURE

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CHRONOLOGICAL STUDY ON POSITIONING WITH EMPHASIS ON MALLS

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ABSTRACT

Growth of malls in India has been phenomenal, initially in the metros and now in tier II and tier III cities. However as per the reports of reputed property consultants, the vacancy levels in various malls have been steadily increasing and the new malls are also struggling to get sustainable occupancy levels. Given this scenario, the authors believe that there is a need for a sound positioning strategy in the development of malls. The successful positioning strategies are those of Sahara mal, Gurgaon as a mall for middle income segment, Select city walk, Delhi for high networth individuals and Palladium in Mumbai as a mall for the creamy layer of the population. This paper, based on the analysis of reports of various consultants, expert opinions and available literature, highlights the importance of positioning of malls in India. A chronological order has been made from the earlier researches about the various ways in which positioning and image were understood and defined. The distinction between image and positioning and how their understanding and usage by marketer's influences consumer decision making process has been presented.

KEYWORDS

Consumer Decision Making, Image, Malls, Positioning, Retail.

INTRODUCTION

The Indian Retail Sector is booming and mall growth in India has been phenomenal. Dominant retail activity is visible in the top cities but tier II and III cities are also witnessing change. However vacancy levels of malls in India continue to be high. According to Jones Lang LaSalle, India, vacancy levels across Indian malls in top seven cities of Mumbai, NCR, Bangalore, Kolkata, Chennai, Hyderabad and Pune is about 17-18%. As per real estate consultants, Knight Frank India, the total vacancy rate of malls is as high as 30% in NCR, 10-12% in Mumbai and 15-18% in the southern markets. Out of the 90 malls expected to be developed, 50% are likely to struggle for occupants. Of the existing malls, some of the successful ones are Select Citywalk (Delhi) and Sahara Mall (Gurgaon). Both Select and Sahara have a clear positioning. While Select Citywalk is positioned for HNI customers, Sahara mall is positioned as a mall for the MIG segment. Palladium in Lower Parel, Mumbai is also able to get good clientele. With high end brands and availability of valet parking it is clearly positioned as a mall for creamy layer of the population. Based on these facts, experts opinion and available literature, the authors conclude that there is lacuna in the strategy development in this area. In short it can be said that a majority of mall developers do not realize the relevance of positioning strategy. Hence there is a need to focus and do researches on this untouched but crucial issue of mall positioning. The purpose of this paper is to conduct a chronological study of positioning and image, distinguish between image and positioning, distinguish between image based consumer decision making and positioning based consumer decision making, discuss the relevance of positioning malls in India, the work done so far on positioning research and the need for future research on mall positioning in India.

METHODOLOGY

To write this conceptual paper, around 40 research papers have been reviewed, out of which 15 research papers were found useful for the study. The research articles have been collected mostly from EBSCO and other sources. Books and electronic resources have also been widely used for the research. A chronological order has been made from the earlier researches about the various ways in which positioning and image were understood and defined. The findings have been presented in the table I in this article. An attempt was then made to distinguish between positioning and image and how their understanding and usage by marketers influences consumer decision making process.

LITERATURE REVIEW - POSITIONING

In early 1960s, *positioning* referred to simply placing or locating. It became popular in marketing only in the 1970s mainly in the area of advertising and promotion (John. P. Maggard, 1976). The earliest distinct definition of positioning was given by Al Ries and Jack Trout (1972) in their seminal work "Positioning: The Battle for your Mind". According to them, "positioning is where the company wants its product to be placed in the customer's mind so that it will achieve optimal utilization... not what you do to the product but what you do to the mind of the prospect." Positioning is also referred to as an act of designing the companies offering and image to occupy a distinctive place in the minds of the target market... (Philip Kotler, 2000). Positioning means different things to different people, to some it means the segmentation decision, to others it is an image question and to still others it means selecting which product features to emphasize (David Aaker and Gary Shansby, 1982). Lewis Alpert and Ronald Gatty (1969) described consumers in terms of their usage, their perceptions about a brand, and demographics such as age, income and family size. This is useful in finding out product positioning which they define as the differentiation of brands by studying the ways in which their consumers differ as well as how consumer perceptions of various brands differ. In retail, positioning refers to the target market segment (s) served by the retailer and the differential advantage it is perceived to offer (Marcel Corstjens and Peter Doyle, 1989).

A new perspective on positioning was conceptualized by Andreas Herrmann and Frank Huber in 2000, which included a place (what place does the specific brand occupy in its relevant market?), a rank (how does the given brand fare against its competitors on various evaluative dimensions?) and a mental attitude (consumer attitudes – the cognitive, affective and action tendencies) toward the given brand. In short, product positioning means the place, a product occupies in a given market.

IMAGE Vs. POSITIONING

The term image is an abstract concept incorporating the influences of past promotion, reputation and peer evaluation of the alternative and it connotes the expectation of the consumer (Dennis H. Gensch, 1978). To differentiate between positioning and image, David Aaker and Gary Shansby (1992) say that the term

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position differs from the older term image in that it implies a frame of reference; the reference point usually refers to the competition. For instance, when the Bank of California positions itself as being small and friendly, it is explicitly, or perhaps implicitly, positioning itself with respect to Bank of America.

In their study on retail stores, Zimmer and Golden found that consumers used different types of image descriptors to express their perceptions, i.e., attribute based perceptions, global image perceptions, store-type labels, prototypic and exemplar image descriptions, product-related image descriptions and behavioral image descriptors. A store's image as defined by Zimmer and Golden is the way it is perceived by consumers. The consumer's perceptions of store image include both subjective and objective characteristics. Overall image of a retail store is greater than the sum of its parts. In a similar way a store's image is a combination of factual and emotional material and also a combination of tangible and intangible factors (Golden, Albaum and Zimmer, 1987).

As Subroto Sengupta (1995) says, the brand image represents the essence of all the impressions or imprints about the brand that have been made on the consumer's mind. It includes impressions about the physical features, functional benefits, people who use it, emotions and associations aroused by it, imagery and symbolic meanings evoked in the consumer's mind. The brand image is the totality of the brand in the perception of the consumer. It is truly a complex symbol and defines oversimplification. On the contrary, when we compare image with positioning, it is clear that positioning is the simplification.

TABLE - I: CHRONOLOGICAL CHART OF THE STUDIES ON IMAGE AND POSITIONING

S. No.	Year	Author	Findings
1	1958	Martineau	Image of a retail outlet as a combination of functional and psychological attributes
2	1961	Kunkel and Berry	Retail store image as a total conceptualized or expected reinforcement associated with that particular store
3	1969	Lewis Alpert & Ronald Gatty	Differentiation of brands based on consumer perceptions defined as Product Positioning
4	1972	Al Ries and Jack Trout	Positioning as a marketing strategy
5	1974-75	Lindquist	Store image as a combination of tangible and intangible factors
6	1974-75	Oxenfeldt	Store image as a combination of factual and emotional factors
7	1976	John. P. Maggard	Evolution of Positioning meaning as placing or locating to its related advertising and promotion Positioning Strategy Internal & External Positioning Positioning as a conceptual vehicle Head on Positioning Social accountability positioning
8	1978	Dennis, H. Gensch	Image as an abstract concept incorporating the influences of past promotion, reputation and peer evaluation of the alternative and connotes the expectation of the consumer
9	1982	David Aker and Gary Shansby	Positioning as (i)a segmentation decision (ii) an image question (iii) selection of product features to emphasis
10	1982	David Aker and Gary Shansby	Difference between image and positioning. Position implying reference to competition
11	1982	Leonard Berry	Positioning as identifying and occupying an available position in the market
12	1987	Golden, Albaum and Zimmer	Types of image descriptors used by consumers
13	1988	Zimmer and Golden	Store's image as subjective and objective characteristics
14	1989	Marcel Corstjens & Peter Doyle	Positioning referred to retailer's target market segment and its perceived differential advantage
15	1990	Subroto Sengupta	Image representing the essence of all the impressions or imprints about the brand in the consumer's mind.
16	2000	Philip Kotler	Positioning as a company's offer to occupy a distinctive place in the target market's mind
17	2000	Andreas Herrman & Frank Huber	Positioning as a (i) place (ii) rank (iii) mental attitude
18	2007	Jones LL & Meghraj Report	Positioning of mall referring to offer of category or services with respect to demographics, psychographics, income levels and competition.
19	2011	Suresh Sannapu and Nripendra Singh	Positioning as fulfillment of the dual expectations of each of the three stakeholders – mall developers, retailers and shoppers

Source: As adapted by the authors from various publications

It is evident from the table-I, 'Chronological chart of the studies on Image and Positioning' that the term Image was initially used by researchers and academicians for defining the consumers overall perception especially in retail stores. The term image was gradually replaced by positioning, which got the focus of researchers and was used commonly. Also, it is observed that there is a significant difference from how positioning emerged and understood in the 60's and how it culminated to its present definition. Even now the thin line between image and positioning is not understood by many marketers and they are synonymously used by them. However, from the table few things are clear. Positioning quite distinctly differs from image, in the sense, positioning has clear reference to competition where as image need not be so. For instance, DLF Emporia is positioned as luxury mall; implicitly it refers to being high end compared to Ansal Plaza in Delhi and Metropolitan Gurgaon. Similarly, Sahara mall in Gurgaon is positioned as a mall for the MIG (middle income group) segment, implicitly refers that customer segment which it caters to differs from the segments targeted by Select Citywalk in Delhi or Ambience Mall in Gurgaon. On the other hand image is a complex symbol. For instance, DLF Emporia has a image of a mall with aesthetic design, spacious, premium merchandise, life style products, good ambience, large visual displays, wide corridors, artful lighting, visited by the rich for buying premium products.

TABLE II: MALL POSITIONING Vs. MALL IMAGE

Mall Name	Positioning	Image
DLF Emporia, Delhi	Luxury Mall	Mall with aesthetic design, spacious, premium merchandise, life style products, good ambience, large visual displays, wide corridors and artful lighting.
Sahara Mall, Gurgaon	Mall for MIG (Middle Income Group)	A mall with high range of products, reputed brands, good parking, large atrium, reputed anchor stores, reputed restaurants, good discounts and multiplex

Source: As developed by authors

MALL POSITIONING AND CONSUMER DECISION MAKING

Before the malls have arrived on the shopping map, most consumers had to visit local kirana store for convenience products and local markets or high streets(like those at Sarojini Nagar, Lajpath Nagar and Janpath, high streets at South extension and Cannaught Place at Delhi) for shopping products. When the first few

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malls have come up, many consumers have replaced malls and other organized retail formats as shopping destinations to local markets and kirana stores. The malls have given the consumer the convenience of shopping, food and also movies at one place. The benefits from the malls were saving of time, effort, money, a pleasant environment and good ambience to shop at. However as the malls have started coming up in large numbers, they have also come with almost the same retail mix. In a poll question asked by India Retailing, "Shopping centres are still not unique when it comes to retail offerings", 68.22 per cent of the respondents said "yes", whereas only 8.41 per cent said "no". As shoppers have to make a choice, they have started patronizing a few malls and have started ignoring the rest. The authors believe that the reason for this is the complexity involved in the image based decision making in selection of these malls. Majority of the malls carried the same image in that they offered similar retail mix in terms of shopping, entertainment and food. This similarity in image based perceptions made the consumer decision making complex. On the other hand, positioning based decisions were easier. For luxury goods you visit DLF emporia, for gold products you visit Gold Souk and so on. In future there may be malls based on categories (food and grocery or apparel), themes (entertainment, kids, women or family), etc. Hence, the authors conclude that positioning will help consumers in simpler decision making and will hence help in mall patronization. Fig. I A consumer decision making model has been developed using illustrations from the retail sector (malls).

FIG. I: IMAGE BASED VS POSITIONING BASED CONSUMER DECISION MAKING

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Looking at the tremendously growing organized retail in India, it is quite surprising that positioning concept is hardly used by the sector, despite an impulsive need forced by the market environment. Mall occupancy rates are decreasing day by day, vacancy rates are going up, decreasing footfalls, increasing number of window shoppers, increasing cost of resources and services and growing competition, it is inevitable to differentiate between image and positioning. A proper understanding of the two can help to reduce the ambiguity in terms of developing a sound strategy.

RECOMMENDATIONS/SUGGESTIONS

A well-planned and implemented strategic positioning is critical for the success of a shopping mall (Yiu & Yau, 2006). Positioning plays an important role for the success of any mall. A very well designed mall constructed with good aesthetics can be a failure if the positioning is not done in an appropriate way. For instance, positioning is the primary factor for a luxury retailer. To give an example, French label Christian Dior scouted for a suitable space in Mumbai for more than four years before finally settling for a store in the upscale Taj Mahal Palace Hotel in October 2010. Thus, the success of Indian malls will not only be achieved by housing the best mix of retailers, but also by setting up new standards and procedures that will provide a platform to differentiate itself from competitors. Retailers can also help developers with their operational expertise to devise strategies best fitted with the overall mall positioning. As has been observed that many malls are becoming unviable, one of the main reasons seems to be a lack of sound positioning strategy. Facing a similar situation in the U.S., the importance of mall positioning has been recognized within the shopping center industry and industry leaders have been encouraging low performing malls to emulate (LeHew & Fairhurst, 2000). Similarly in India now developers who have understood the importance and relevance of positioning of their mall are emerging as successful. An image focused strategy leads to confusion in the minds of customers as it creates complexity because of too many focuses on different features and characteristics of the mall, leading to complexity in decision making. On the other hand, positioning strategy gives a clear picture of mall to the shoppers and clearly identifies the advantages over the competition, which simplifies the decision making in the minds of the customers.

CONCLUSION

Thus, it can be concluded that with crores of investment at stake, and expected huge losses it is rather surprising that there is no clear positioning strategy in place for many malls. However it is heartening to note that the sector has started to realize the importance of the same, and a few of them have taken significant steps in that direction. The authors hope that with increasing realization about the importance of mall positioning, if more developers take interest in positioning their malls, the benefits will be galore not only for the developers, but also for the retailers for more profitability and also for shoppers in their shopping decisions.

SCOPE FOR FURTHER RESEARCH

There is a large scope of research on positioning of malls in India. As a part of the ongoing study, the authors have brought in the conceptual understanding through this paper, which is validated by an empirical study in the forth coming research paper. Research may also be conducted in other situations and geographical regions to validate the same.

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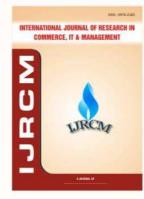www.ijrcm.org.in

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