Analysis of Consumer's Perception and Preferences towards Food and Grocery Shopping in Delhi

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Abstract

Food and grocery retail is an unchartered territory in India. Food and grocery products are largely purchased by consumers from the nearby kirana stores/ mandis which is highly unorganized. However, in the recent timesthere has beenan inclination towards 'Modern' formats including super markets, convenience stores, discount stores and hyper markets primarily driven by change in consumption patterns, food and eating habits, technological advancements. Also, several reforms have been initiated by the government in the field which includes announcement of 100% overseas capital in processed food retailing, Start-upIndia, Make-in-India and Digitalization which has increased the scope for organized and online retailing being an advocate for cashless and transparent economy.

This paper captures the responses of the different consumers of the food and grocery retailing. Delhi has purposively been selected as a sample for the same as being the Tier 1 city it has the immense opportunity for organized retailing. This paper is an attempt to analyze the consumer's mood and perception towards organized and online retail vis a vis traditional retailing along with studying the industry trends.

Keywords: Food and Grocery retail, Brick and Mortar store, online stores and FDI

Introduction

Indian retail has experienced a great evolution fulfilling the diverse needs of the country given its size and complexities. Haats, mandis and melas have been historically been a key feature of Indian retail. They continue to be present in most part of the country and form an essential part of life and trade in various areas. The organized retail originated in the late 1980s in India, it is initiated by some renowned businesses in India including textile majors, entering the retail space through owned or franchisee outlets. There were few tailoring shops which eventually expanded to become fashion retailers – Mumbai's Charagh Din, Kolkata's Burlington, Delhi's Mohanlal Sons, and Banglore's P. N. Rao etc. South India had a lead in the evolution of food and grocery retailing, with stores like Nilgiri's, Foodworld, Margin Free etc. taking the lead in the segment with their stores in organized pattern of retail. Apart from this, consumer durables segment also has its origination in the South with regional players includingVivek's, Giria's, Pai International, Vasanth & Co. etc. (Saleem Hadi, 2014)

Retail franchising has grown at the rate of 60 percent in the last 3 years and is set to grow two-fold in the next 5 years. (Rama Krishna Prasad, 2011)

- Food and Grocery remains one of the biggest categories of consumer spending (60 percent) but account for only 10 percent of organized retailing, constituting a huge opportunity for retailers
- Wet groceries which includes fruits, vegetables and meat products are the most capable category due to its largeuntapped potential
- There are opportunities in consumer durables segment which currently has 9 percent share of the modern retail is expected to grow to 11 percent by 2013
- As per Central Institute of Post-Harvest Engineering & Technology, food worth 92,000 crore gets wasted

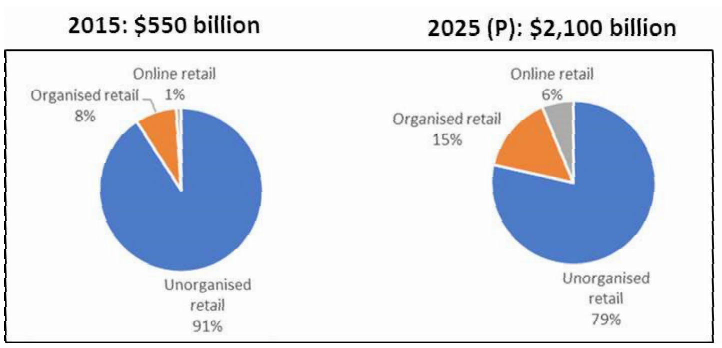


Figure 1. Indian retail trade scenario[4]

Source: India food report 2015[4]

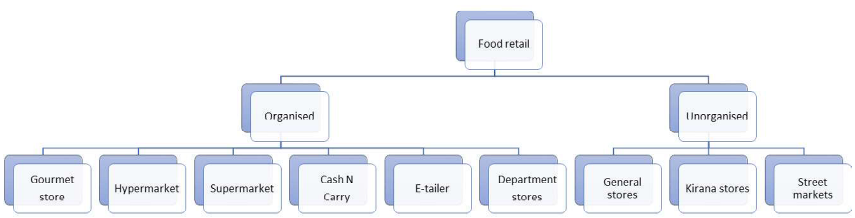


Figure 2. Indian retail trade structure

Food & grocery forms the backbone of the Indian retail sector. With an estimated market sizeof US$ 320 billion (Rs. 20,000bn) the categoryaccounts for about 57% of the total retail market.There are an estimated 8m-9m food & grocerystores (including local kirana shops, hawkers etc.) in India.

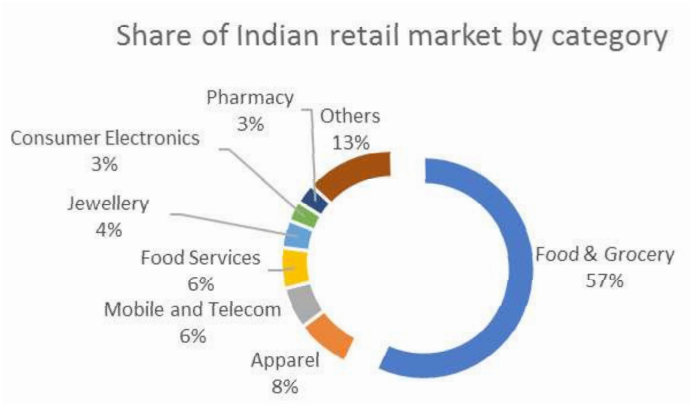


Figure 3. Share of Indian retail market by category

Source: India food report 2015

The penetration of modern organized retail in food is currently one of the lowest at 2-3%. However, the entire retail scenario is expected to change dramatically in next 10-15 years and organized retail is expected to penetrate the markets deeper. It is expected that organized retail will capture c.8-9% of the food & grocery market by and its size will reach out to be US$ 90-100 bn. (Rs.5,600-6,200bn), growing at a CAGR of 25-30% from the current levels. Online grocery stores too are also picking steam and "food & grocery" seems to be the next big opportunity in the e-tailing space. As on date there are more than sixty online food & grocery stores and more are coming up each week.

(Charu Arora, 2012)5 stated that Indian food and grocery retailing can be divided into branded and unbranded segments and into this as well it can be categorized into fresh and branded groceries, branded and unbranded packaged foods, personal hygiene products and toiletries along with dry unprocessed groceries. The food & grocery sector is characterized by large number of traditional formats like the independent grocers, the pan shops, bazaars, government fair price shops and co-operatives like Kendriya Bhandaar, Apna Bazaar, Sahakari Bhandaar, etc. dominate this sector. In comparison, modern retail formats viz., convenience stores, discount stores, supermarkets and hypermarkets constitutes a small proportion of sales.

Grocery retailers saw faster growth than non-grocery retailers after the financial crisis in 2008. This led the value share of grocery retailers to increase to 68%, which was the same as the share in 2005. In 2010, inflation was the main driver of value sales in grocery retailers, as it was stubbornly high, which drove up the prices of essentials such as dairy products, pulses and vegetables. The traditional trade will remain an important retail channel in most developing markets, although they will lose share at a rate of about 1% per year, While India will have a lot of focus from a regional perspective with investment being ramped up again over the next few years.

Face of grocery retail in India is changing with the huge investments coming from corporates; RPG Spencer, Future group, Reliance, Subhiksha, etc. Retail sector is fastest growing sector in Indian economy.

Further, International players like Tesco and Carryfour are also entering India. Business of retail and banking are closely linked. Attempt are made to make easy finance easily available. Finance should also be made easy to facilitate expansion and restructuring plans.

India joined has been rather slow in joining the organized retail revolution as compared to its Asian peers. This is largely due to excellent food retailing system that was established by kirana (mom and pop) stores that met the retail requirements also due to the highly fragmented food supply chain that is cloaked with several intermediaries (Farmers – processors – distributors - retailers) resulting in high value loss and high costs. This supplemented with lack of developed food processing industry kept the organized chain out of the market place. The correction process is under way and attempts are made for effective B2B (farmers, processor, processor-retailer) solution by leveraging the core competencies of each player in the supply chain. Indian retail is the fifth largest and the fastest growing in the world. Though initially industry was unorganized but is becoming more organized with changing taste and preferences of people. With growing demand industry is expected to grow at 25-30% annually. (Charu Arora, 2012)

According to (Rasheed Sulaiman V N.J. Kalaivani, Jatinder Handoo, 2010), First supermarket to have been established is Nilgiris, it was established in 1905 near Ootacamund in South India as a dairy farm. Other pioneers in the field include Spencers, Safal and National Dairy Development Board (NDDB), which has been part of Indian retail since late 1980s with Safal opened its first grocery outlet in 1863. Also, National Dairy Development Board (NDDB) was among first organized grocery retailing of fruit and vegetables in North India mainly Delhi. Another initial food retail Establishment and expansion of the "Food World" outlets by the RPG Group starting with the first outlet in Chennai in 1996 led to enhanced corporate interest in food retailing. RPG (Spencers), Reliance (Fresh), ITC (Choupal Fresh), Aditya Birla (More). Few players actively involved in food and grocery retail includes Heritage (fresh@), Pantaloon Retail (Food Bazaar), Bharti (Easy day), Express Retail (Big Apple).

3 models are widely prevalent in Indian food retail:

- Inventory led: Stocks all the inventory in warehouses and distributes products from there; followed by offline stores and online stores like BigBasket
- Market place model: E-tailers ties up with various local mom-and-pop stores; enabling partner stores also to get some increased sales; followed by Pepper Tap
- Hybrid business model: The model is a mix of warehousing and just in time

Existing Players

In today's environment food and grocery has taken another leap with introduction of online players. With a cost-efficient business model, these firms are trying to capture the customer's attraction and dividing the market into aa battle field between offline and online retailers. Online retailers have the capacity to capture the customers from larger area while on the other hand offline retailers always have the personal touch required for the grocery shopping.

- Key offline retailers: Big bazaar, More, Reliance Fresh, REI Agro Fresh and Spar
- Key online retailers: AmazonFresh, Big Basket, Grofers, Peppertap, Aaram Shop, Local Banya and Godrej Nature's Basket

Objective of the Study

- To understand the food and grocery shopping habits of consumer's in Delhi-NCR region
- To compare the three different retail formats i.e. traditional formats, online stores and modern convenience/ departmental stores in terms of grocery shopping
- To identify the key concerns/ attractions in the food and grocery retailing

Methodology

Consumers are the ultimate stakeholders for any industry. Therefore, to understand their sentiments, a primary study with a sample size of 400 people is done, primarily to know consumer's perception on different shopping formats available. Four residential categories are chosen from Delhi to collect the data from people of age group between 20 – 50 years. Questions related to buyer's shopping experiences was asked to know their opinion on different shopping formats. A pilot survey was also conducted initially. Apart from that, various tests are also applied to check the statistical reliability of the data.

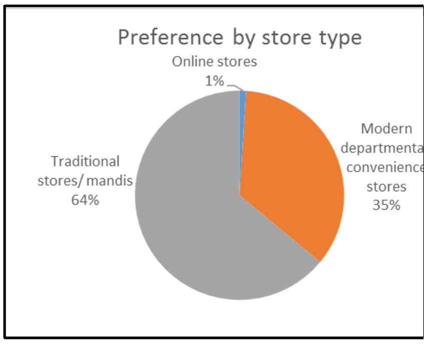
- Population:Primary survey is carried out in Delhi-NCR
- Sampling method:Random sampling
- Sample: In Delhi-NCR, there is a great diversity in population; people from different educational backgrounds, culture, religion, beliefs, occupations, etc. resides in Delhi. Delhi is divided into categories A, B, C, D, E, F, G, H residential categories by municipal corporation, where category A has most posh colonies like Friends Colony and Maharani Bagh and category H has villages and newly regulated/ unregulated colonies like Sultanpur Majra
- To maintain a mix in the representation, sample is drawn from 4 different categories. (A, C, E & G)
- A sample of 100 people per block in the age group of 20–50 years is selected on a random basis to keep it an adequate representation

Tools

Questionnaires and unstructured interview

Data Analysis and Interpretation

Based on respondents' views on various questions being asked in the questionnaire, the below outcome has been obtained.



- *Traditional stores have the highest domination among the consumer's preference*
- *Modern departmental/ convenience stores follow the traditional format at 35% of stake*
- *Modern retail is showing a greater share (35%) when compared to nationalcontribution by organized retail in India (8-10%)*

Figure 4. Preference by store type

Figure 5. Preference by Shopping Type

Both online as well as physical formats of grocery retailing are bound to exist in parallel to each other. In offline, the major players are Big Bazaar and Reliance Fresh where Grofers and Big Basket are the major online stores. People specially in Tier 1 city like Delhi have increased their likeliness for organized retail, being convenient and time saving. Further, questions on consumer's perception are asked to map the various parameters comparing the traditional, modern and online stores format.

Consumer's perception

Select parameters were identified based on the unstructured interviews conducted. Based on weighted average score of people's response to these parameters (5 being the highest score), it was found that parametersincluding home delivery, attractive offers, convenience and variety of offerings makes online shopping attractive for consumers. Modern departmental/ convenience stores are also moving slightly below the online stores. However, Traditional stores are not able to score good when compared on select parameters with other formats. This obviously provide an opportunity to the non-traditional formats (organized retailing) to increase its market share. Additionally, various tests have been performed to check the reliability and acceptability of the data.

Table 1 : Consumers' Perception by Retail Formats

Retail format	Parameters	Score	Count	Score	Count	Score	Count	Score	Count	Score	Count	Sum Total	Weighted average score
Traditional kirana stores/ mandis	Price	1	0	2	52	3	168	4	116	5	64	400	3.48
	Quality	1	0	2	48	3	164	4	144	5	44	400	3.46
	Variety	1	16	2	108	3	132	4	104	5	40	400	3.11
	Hygiene	1	16	2	88	3	124	4	120	5	52	400	3.26
	Home delivery	1	48	2	32	3	128	4	96	5	96	400	3.40
	Credit facility	1	56	2	52	3	120	4	92	5	80	400	3.22
	Offers	1	128	2	80	3	92	4	64	5	36	400	2.50
	Service	1	16	2	44	3	164	4	108	5	68	400	3.42
	Ambience	1	44	2	92	3	168	4	60	5	36	400	2.88
	Convenience	1	24	2	44	3	120	4	112	5	100	400	3.55
	Ease of shopping	1	24	2	52	3	120	4	124	5	80	400	3.46
	Value for money	1	8	2	40	3	160	4	132	5	60	400	3.49
Online Stores	Price	1	32	2	56	3	94	4	138	5	80	400	3.45
	Quality	1	32	2	24	3	126	4	170	5	48	400	3.45
	Variety	1	20	2	28	3	66	4	142	5	144	400	3.91
	Hygiene	1	32	2	24	3	118	4	142	5	84	400	3.56
	Home delivery	1	44	2	16	3	66	4	84	5	190	400	3.90
	Credit facility	1	64	2	60	3	130	4	56	5	90	400	3.12
	Offers	1	8	2	36	3	94	4	146	5	116	400	3.82
	Service	1	8	2	36	3	132	4	124	5	100	400	3.68
	Ambience	1	32	2	28	3	122	4	146	5	72	400	3.50
	Convenience	1	8	2	28	3	98	4	166	5	100	400	3.81
	Ease of shopping	1	44	2	36	3	66	4	122	5	132	400	3.66
	Value for money	1	8	2	68	3	140	4	108	5	76	400	3.44

Weighted average score calculated as:

$((Score_1*count_1)+(Score_2*count_2)+ (Score_3*count_3)\ldots..+(Score_n*count_n))/Sum\ Total$

***Scores are weighted based on count of number of persons responding in each score category to reflect score inclination

Modern departmental/ convenience stores	Price	1	0	2	44	3	148	4	164	5	44	400	3.52
	Quality	1	0	2	56	3	140	4	148	5	56	400	3.51
	Variety	1	0	2	52	3	136	4	128	5	84	400	3.61
	Hygiene	1	8	2	44	3	112	4	132	5	104	400	3.70
	Home delivery	1	44	2	92	3	120	4	104	5	40	400	3.01
	Credit facility	1	60	2	108	3	124	4	72	5	36	400	2.79
	Offers	1	24	2	36	3	152	4	132	5	56	400	3.40
	Service	1	8	2	72	3	140	4	128	5	52	400	3.36
	Ambience	1	8	2	68	3	124	4	116	5	84	400	3.50
	Convenience	1	8	2	68	3	152	4	108	5	64	400	3.38
	Ease of shopping	1	16	2	40	3	132	4	148	5	64	400	3.51
	Value for money	1	0	2	72	3	164	4	116	5	48	400	3.35

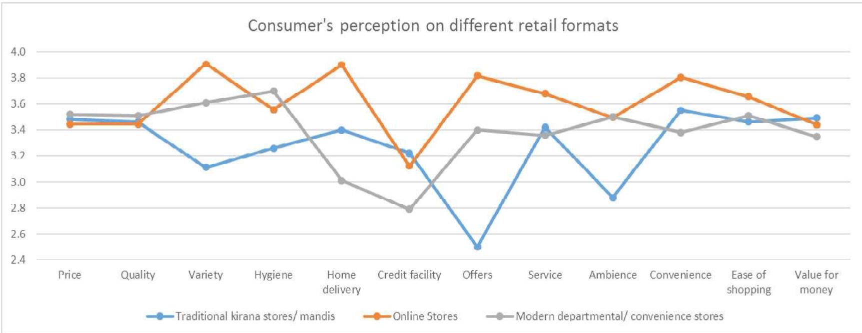


Figure 6. Consumers' Perception on Different Retail Formats

Cronbach's Alpha

Cronbach's alpha measures internal consistency of the data, It helps to ascertain the closeness of the related a set of items as a group. It helps to measure scale reliability. The theoretical value of alpha varies from zero to 1, since it is the ratio of two variances. Higher value of alpha is more desirable.

To measure the scale reliability of the above survey, Cronbach's Alpha is applied. As the data is collected through Likert's scale, Cronbach's Alpha provides a good measure for consistency of data.

Table 2 : Weighted average score on consumers' perception

Parameters	Weighted average score		
	Traditional kirana stores/ mandis	Online Stores	Modern departmental/ convenience stores
Price	3.48	3.45	3.52
Quality	3.46	3.45	3.51
Variety	3.11	3.91	3.61
Hygiene	3.26	3.56	3.70
Home delivery	3.40	3.90	3.01
Credit facility	3.22	3.12	2.79
Offers	2.50	3.82	3.40
Service	3.42	3.68	3.36
Ambience	2.88	3.50	3.50
Convenience	3.55	3.81	3.38
Ease of shopping	3.46	3.66	3.51
Value for money	3.49	3.44	3.35

Weighted average score calculated as:

$((Score_1*count_1)+(Score_2*count_2)+(Score_3*count_3).....+(Score_n*count_n))/\text{Sum Total}$

***Scores are weighted based on count of number of persons responding in each score category to reflect score inclination

In the result above three tables show the positive results for the internal scale consistency. For all the three formats Cronbach's Alpha was above 0.9.

Table 3. Reliability statistics on different stores format

Traditional stores/ mandis

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.926	.930	12

Online stores

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.943	.947	12

Modern departmental/ convenience stores

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.941	.945	12

Anova

Additionally, ANOVA test was applied to check the data reliability. ANOVA is applied on the weighted average mean of samples of shopping opinion on 3 different parameters. Main purpose of applying ANOVA is to know the relationship between the three shopping formats and various shopping parameters.

H_{o1}: There is no relationship between shopping formats (Traditional, online and modern formats)

Table 4 : ANOVA reliability test

SUMMARY	*Count*	*Sum*	*Average*	*Variance*
Row 1	3	10.45	3.48	0.00141
Row 2	3	10.42	3.47	0.00116
Row 3	3	10.63	3.54	0.16151
Row 4	3	10.52	3.51	0.05028
Row 5	3	10.31	3.44	0.19903
Row 6	3	9.13	3.04	0.05063
Row 7	3	9.72	3.24	0.45191
Row 8	3	10.46	3.49	0.02893
Row 9	3	9.88	3.29	0.12711
Row 10	3	10.74	3.58	0.04576
Row 11	3	10.63	3.54	0.01026
Row 12	3	10.28	3.43	0.00503
Column 1	12	39.23	3.27	0.09597
Column 2	12	43.26	3.61	0.05432
Column 3	12	40.64	3.39	0.06448

ANOVA						
Source of Variation	*SS*	*df*	*MS*	*F*	*P-value*	*F crit*
Shopping parameters	0.793464	11	0.072133	1.01143	0.468128	2.258518
Shopping formats	0.697039	2	0.348519	4.886842	0.017535	3.443357
Error	1.568994	22	0.071318			
Total	3.059497	35				

As the calculated critical value i.e. 4.886842 is more than the table value i.e. 3.443357. Hence, null hypothesis is rejectedand alternate hypothesis is accepted that there is a significant relationship between three retail formats.

Correlation

Table 5 : Correlation test on different stores format

Descriptive Statistics

	Mean	Std. Deviation	N
Traditional_stores	3.2833	.31861	12
Online_stores	3.6000	.24495	12
Mordern_stores	3.3917	.25030	12

Correlations

		Traditional_stores	Online_stores	Mordern_stores
Traditional_stores	Pearson Correlation	1	-.151	-.002
	Sig. (2-tailed)		.639	.995
	N	12	12	12
Online_stores	Pearson Correlation	-.151	1	.297
	Sig. (2-tailed)	.639		.349
	N	12	12	12
Mordern_stores	Pearson Correlation	-.002	.297	1
	Sig. (2-tailed)	.995	.349	
	N	12	12	12

At last, correlation analysisis applied to judge the correlation among the 3 retail formats. The scores are considered through the sample of 400 population on the 12 different parameters. Likert's scale is used to ascertain the opinion of people on different parameters including price, quality, variety, hygiene, convenience among others; 1 being the lowest and 5 being the highest score. The consolidated ratings of each subgroup i.e. traditional vs online vs modern formats are then weighted based on respective count and an average number is considered for each format.

Modern stores reflected the highest mean score clearly showing the positive sentiments of people towards the modern format of retailing followed by online stores. On the other hand, traditional stores ended up with lowest score at 3.28 with a significantly high deviation.

Overall, the correlation between modern and online stores came in negative relation with traditional stores. While modern stores and online are positively linked to each other, traditional stores are indirectly connected. In the survey, major outcome is the growing trend towards the modern and organized retail format including the online shopping formats. Although the survey is done in the metropolitan city and the data cannot represent the entire country but it shows a positive trend for organized retailing in food and grocery shopping.

Key attractions & issues

As an extension to the above survey, some additional questions were asked regarding the attractions and issues with different retail formats to know the strengths and fix the issues in the modern retailing. The outcome is here below:

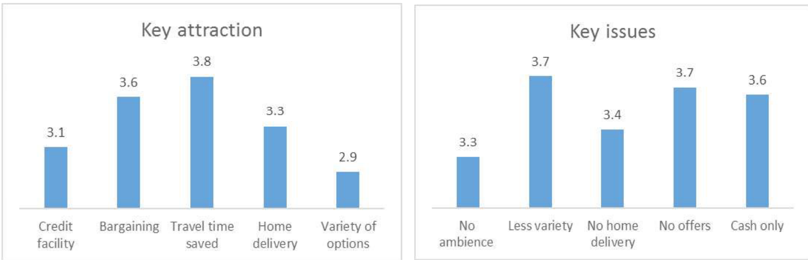


Figure 7. Traditional stores/ mandis

Figure 8. Online stores

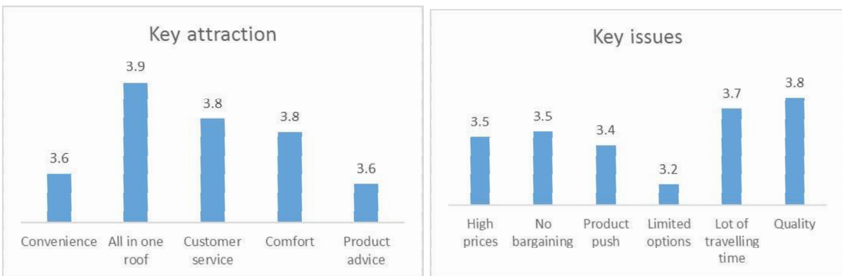


Figure 9. Modern departmental/ convenience stores

Industry trends

Some of the recent developments in the food and grocery segment that made the headline includes:

- Mar 30, 2017: India may ease rules for foreign food retail beforeNovember
- Mar 22, 2017: Quiet grocery chain, D-Mart debuts with a bang
- Jan 13, 2017: Demonetisation triggers shift from unorganized to organized retail
- Jan 11, 2017: Demonetization saga offers a tremendous opportunity for both offline and online customers to convert their customers toward cashless transactions
- Jan 05, 2017: BigBasket sales jump 3x to Rs 563 crore in FY16; Losses up 4x
- Dec 23, 2016: Amazon expands grocery, household products service to 6 more cities
- Dec 19, 2016: Spencer's eyes Rs 500 crore revenue by 2020 from e-commerce
- Sep 13, 2016: Several big retailers in the UK including Tesco, Sainsbury's, Marks & Spencer, Partridges and Waitrose are keen to enter the food retail business in partnership with local players, food processing minister Harsimrat Kaur Badal
- Sep 19, 2016: Future Group is in final talks to acquire the retail business of Heritage Foods; Consolidation of Indian retail on Biyani's radar
- Aug 23, 2016: Kishore Biyani's Future Group in talks with Aditya Birla Retail to buy or merge business
- Aug 22, 2016: The government is planning road shows abroad to showcase India's food retail sector, having failed to drum up much foreign direct investment after unveiling a landmark policy two months ago
- Apr 29, 2016: Walmart wants to sell food products in India via both brick-and-mortar and online stores
- Sep 20, 2016:Food Retail Market Worth US $8,541.9 billion by 2020
- Jun 21, 2016: Government allows 100% FDI for online grocery startups

Conclusion

Indian retail has experienced many significant changes in the recent past. Both domestic as well as foreign players are trying their best to lure customers towards organized form of retailing. Food and grocery retail is directly linked to farmers as well, which means any reforms in food and grocery retail will do good to them as well. Food and grocery retail is predominantly unorganized and characterized by the presence of large number of intermediaries; which are again unaccounted.Organized retail along with the entrance of online portals are providing consumers a value for their money by making direct contact with the farmers.

Above research paper captures the views and opinions of people of Delhi-NCR regarding their preferences and perception on food and grocery retailing, which is clearly favoring the inclination of consumers towards organized retail. Major reason for the same is the changing lifestyle and habits of the consumers, city traffic, demand for one stop shopping destination, quality and variety desirability and introduction on better connectivity services and cashless payment mode. Major attraction towards organized retail includes attractive pricing offers, less shopping time, all in one roof, home delivery and return policy, while issues such as no physical examination, safety of online transaction, no bargaining and product push are the major negative factors for organized food and grocery retail. Unorganized local kirana stores/ mandis are preferable to the customers because of ease of shopping, being located at the neighborhood locations but in the absence of variety and offers they are also facing issues.

This paper concludes that the traditional stores have the highest domination among the consumer's preference (64%); followed by modern departmental/ convenience stores (35%) and online stores (1%) which is greater share when compared to the national contribution by organized retail in India (8-10%). This obviously proves the inclination of preferences from unorganized to organized form of retailing slowly but gradually. Although, it is believed that in a country like India both organized and unorganized form of retailing are bound to exist.

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