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# Consumer's Preference on Food Retail Store Attributes in India

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# CONSUMER'S PREFERENCE ON FOOD RETAIL STORE ATTRIBUTES IN INDIA

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## Abstract

This paper examines how consumer prefer a variety of attributes of food retail stores while making food purchase decisions and evaluate the effects of socio-demographic factors on their preferences for these market attributes. A sample of 621 urban consumers was personally surveyed using structured questionnaire from six district headquarters of Uttar Pradesh. Simple statistical analysis were carried out such as descriptive statistics, frequency distribution, cross tabulation, analysis of variance and factor analysis to assess the consumer's preference for food store attributes. Analysis of consumers' responses on food store attributes indicates that food retailers should aim to offer a variety of products and services to attract them. The results may help the food processors and outlet owners to understand the diversified set of preferences for market attributes so that they can make better decisions in emerging organized food retail environment.

## INTRODUCTION

Food purchase behaviour of consumer in most of the emerging economies like India has significantly changed in the recent decade. The consumers have

been transforming the food consumption due to increase in *per capita* disposable income, increase in global interaction, increased access to information and communication technologies, change in life style, change in family structure and increase in education and health awareness (Pingali and Khwaja, 2004; KPMG, 2005; Rao, et al, 2006; Goyal and Singh, 2007; Nagla, 2007). Furthermore, expanding the country's middle class due to rapid urbanization and increased participation of women in the urban work force has great influence on the consumers' food purchase behavior (Viswanadham, 2006). The changing consumer purchase behavior driven by these factors is fostering the growth of modern food retailing across the country.

Traditionally, Indian consumers have been purchasing food groceries from nearby *Kirana* stores called 'mom and pop stores'. Home delivery services, the convenience of being next door, availability of small quantities of goods, personalised service etc are some of the benefits that retain customer loyalty to these outlets (Sabnavis, 2008). Similarly, fruits & vegetables need of the consumers are generally met by nearby vendors or hawkers. However, consumer format choice decision is dynamic in nature and changed over time (Zeithaml, 1988; Leszczyc et al., 2000; Keen et al. 2004).

The consumers have now become more discriminating in their food product and market choices and have started emphasizing on convenience, freshness and quality of the products (Quagrainie et al, 1998). More importantly, consumers have started considering both monetary and non-monetary aspects such as time and effort, while deciding about a marketplace for purchasing (Zeithaml, 1988, Arnold et al., 1996). Hence, anything that reduces time, effort and cost can increase the value perceptions of the consumers, while selecting a retail format. Search cost for a consumer can be reduced by proper layout and displaying the merchandise and thus maintaining atmospherics value (Kotler, 1973; Sinha et al, 2005). Blackwell et al. (2001) argued that price level, assortment and location of a store appears to be an important driver for consumer's choice between store formats. Many consumers do not prefer the large retail stores due to over-crowding and traffic. It has been observed that the outlets such as Spinach, *Big Bazaar*, Reliance Retail and *Subhiksha* have been delivering quality produce at lower prices by improving economics of scale across the supply chain (Sabnavis, 2008).

Empirical evidences show that store choice is recognized as a cognitive process which is highly influenced by consumer's socio-demographic characteristics (Sinha and Banerjee, 2004). Fox et al. (2004) examined that consumer's demographics (e.g. household size, income and level of education) influence their grocery store choices. Crask and Reynolds (1978) compared the demographic characteristics of frequent and non-frequent patrons of retail stores and concluded that frequent patrons tended to be younger, more educated, and had higher incomes. Arnold (1997) found significant differences between the demographic profiles (e.g. age, education, income, household size) of large-format retail store shoppers as compared to small store shoppers. Zeithaml (1985) illustrated the effects of demographic characteristics on supermarket shopping variables (e.g. shopping time, frequency of visits, amount of money spent) and found that due to shift in consumers' demographics, the traditional mass market of grocery products would break into various market fragments.

Therefore, a proper understanding of consumer purchase behavior is one of the keys to success for today's food retailers. This paper analyses the buying behaviour for food and grocery products of urban consumers and also explores the factors which influence their choices of market for food and grocery. The analysis of buying behaviour of these consumers has greater relevance for emerging organized retail organizations in the food and grocery segment in India, as consumers from urban locations are considered to be potentially early adopters of organized retail chain culture. This study also attempts to identify a diversified set of preferences for retail store attributes for better decision making by retail chains and franchisees in the emerging organized food & grocery retail environment.

## DATA AND METHODS

### Survey data

This study is based on primary consumer survey carried out by the structured questionnaire and personal interviews during the second quarter of 2007. A total of 621 households were interviewed personally to know their perceptions on food retail store attributes, covering six districts of Uttar Pradesh namely Agra, Allahabad, Gorakhpur, Jhansi, Lucknow and Moradabad. The sample households were conveniently selected and emphasis had been given in interviewing those respondents who purchase food products or involved in food preparations. The

survey questionnaire was included a number of questions related to food retail market attributes and their responses have been recorded on 5 point Likert-type scale (1=not at all important and 5=extremely important). Similarly, the questions related to socio-demographic profiles of the respondents such as age, gender, family size, education level and household income were also included.

## Data Analysis

The data collected was digitized in SPSS 15.0 spreadsheet and simple statistical analysis were carried out such as descriptive analysis, cross tabulation and frequency distribution to assess the consumer buying behaviour for food products. Analysis of Variance (ANOVA) was used to assess if socio-demographic factors play any significant role in selecting a food retail outlet. Factor analysis was conducted to identify the underlying dimensions among a set of market attributes. The Principal Component Analysis was done using Varimax rotation criterion. The Kaiser criterion was used to retain factors with eigenvalues only greater than 1.

## Consumers' profile analysis

The socio-demographic profile of overall sample is shown in Table 1. The sample comprises of 69 percent male and 31 percent female respondents, since emphasis was laid on surveying the purchase decision-makers of the households. The age composition of the sample shows normal distribution with average age of 37 years. Educational profile of the sample shows that about 42 percent respondents are graduate and above; 37 percent are having education upto secondary and higher secondary levels. About 57 percent respondents have been found to be vegetarian. Majority of the respondents have more than 5 family members with an average family size of 6 members. The number of earning members is one or two in a family with an average monthly income of Rs. 10696 with a dominance of Rs. 5000 - Rs. 10000 monthly income household group.

## RESULTS AND DISCUSSION

### Buying behaviour of surveyed households

In general, the majority of Indian consumers have preferred fresh & unpackaged food over processed & packaged food products (Pysarchik et al., 1999; Ling et al, 2004). Under this study, the purchase behaviour of consumers

## Table 1: Demographic characteristics of respondents

| Characteristics | Respondents reporting | | Characteristics | Respondents reporting | |
|---|---|---|---|---|---|
| | Number | % | | Number | % |
| *Gender* | | | *Family Size* | | |
| Male | 428 | 68.9 | < 5 members | 174 | 28.0 |
| Female | 193 | 31.1 | 5-6 Members | 249 | 40.2 |
| *Age group* | | | 7-10 members | 152 | 24.5 |
| < 25 years | 143 | 23.2 | > 10 members | 45 | 7.3 |
| 25-35 years | 181 | 29.2 | Average Family size (number) | | 6.2 |
| 36-45 years | 150 | 24.2 | *Number of working members* | | |
| > 45 years | 145 | 23.4 | One member | 272 | 44.4 |
| Average age (years) | | 36.8 | Two members | 203 | 33.2 |
| *Education* | | | 3-5 members | 130 | 21.2 |
| Illiterate | 37 | 6.0 | > 5 members | 7 | 1.1 |
| Below Junior High School & JHS | 91 | 14.8 | *Monthly Household Income* | | |
| High School/ Intermediate | 225 | 36.5 | <Rs.5000 | 121 | 19.5 |
| Graduate | 177 | 28.7 | Rs. 5000-10000 | 234 | 37.7 |
| Post Graduate/ professional | 86 | 14.0 | Rs. 10001-15000 | 123 | 19.8 |
| *Family Type* | | | Rs. 15001-20000 | 69 | 11.1 |
| Vegetarian | 352 | 57.2 | Rs. 20001-25000 | 39 | 6.3 |
| Non-Vegetarian | 263 | 42.8 | >Rs. 25000 | 35 | 5.6 |
| *Only Male Members* | 84 | 37.7 | Average income (Rs.) | | 10696 |
| *All Members* | 139 | 62.3 | | | |

has been assessed through survey method in terms of frequency of purchase, preferred marketplace, preferred market distance and preference on food packaging. The frequency of food purchase primarily depends on the nature of the products i.e. perishable food products are more frequently purchase as compared to non-perishable products. Survey results clearly indicate that fruits and vegetables are the most frequently purchased fresh produce with mean value of 3.04 & 2.13 and mode value of 1 & 2 respectively (Table 2) which indicate that most of the consumer shop for fruits on a daily basis while vegetables are generally purchased on twice/ thrice a week. On the other hand, grain based products are less perishable and therefore less frequently purchased. Analysis reveals that majority of the respondents buy grain based products on a monthly or fortnightly basis.

Table 2 further indicates that most of the consumers prefer nearby marketplaces to meet their food consumption requirements. Grain based food items are generally purchased from vendor shops situated in the residential localities whereas fruits and vegetables are purchases from roadside shops or nearby shops. With rapid change in consumer behaviour towards convenient purchasing, supermarket culture in residential areas is coming up very fast. These supermarkets offer conveniently packaged food items with choose and pick facilities. About 10 per cent of the respondents prefer supermarkets for grain based food purchasing. Food purchasing is distance sensitive (Table 2) and most of the respondents desire availability of food products within one kilometer radius.

With emergence of supermarket and hypermarket, the consumers' preferences for packaged food products have increased in the recent years (Silayoi and Speece, 2004). This trend in India seems to be at an infancy stage as the majority of the consumers in India still buy food items in loose form. Socio-demographic factors play important role in the food retail growth in the country

*Table 2: Consumer's response on food purchase behavior*

| Purchase decisions | Products | N | Mean | Mode | Std. Deviation |
|---|---|---|---|---|---|
| Frequency of purchase[o] | Grain based products | 621 | 3.64 | 4 | 0.99 |
| | Fruits | 621 | 3.04 | 1 | 1.65 |
| | Vegetable | 621 | 2.13 | 2 | 0.59 |
| Preferred Marketplace[*] | Grain based products | 621 | 3.37 | 3 | 0.86 |
| | Fruits | 621 | 2.43 | 2 | 1.30 |
| | Vegetable | 621 | 3.04 | 4 | 1.51 |
| Preferred Market Distance[ψ] | Grain based products | 612 | 1.92 | 1 | 1.26 |
| | Fruits | 612 | 1.62 | 1 | 0.93 |
| | Vegetable | 612 | 1.59 | 1 | 0.89 |
| Preference on food packaging[⊥] | Grain based products | 621 | 1.55 | 1 | 0.75 |
| | Fruits | 621 | 1.31 | 1 | 0.51 |
| | Vegetable | 621 | 1.28 | 1 | 0.49 |

[o] Daily-1, Twice/thrice a week-2, Weekly-3, Monthly-4, Others-5

[*] Hawkers-1, Roadside shops-2, Nearby vendor/ shop-3, local market-4, Supermarket-5, Wholesale market-6

[ψ] <1/2 km-1, ½ to 1 km-2, 1 to 2 km-3, 2 to 5 km-4, > 5 km-5

[⊥] In loose form-1, Vendor packaged-2, Branded (packaged)-3

(Viswanadham, 2006). Empirical evidences indicate that socio-demographic factors influences food purchase decisions in one way or another throughout the world (Roux et al, 2000; Roslow, et al, 2000; Turrell et al, 2002; Choo et al, 2004; Rao et al, 2005; Krystallis and Chryssohoidis, 2005; KPMG, 2005; Goyal and Singh, 2007; Bukenya and Wright, 2007).

A comparison of consumer responses on 4 aspects of food purchase behavoiur with demographic profile of the respondents has been done by computing analysis of variance (ANOVA) to assess if there is any significant difference in the responses for grain based products, fruits and vegetables separately (Table 3). ). Results indicate that out of 4 aspects of food purchase, male and female differ significantly on the frequency of purchase and choices of market place for fresh fruits & vegetables and grain based food items; and preference on packaging for these items. Males generally prefer to purchase grain based products once in a month while most of the female respondents prefer a weekly purchase. On the other hand, male respondents prefer to travel more distance for purchase fresh fruits and vegetables from vendor shops while females prefer to purchase these items from road side shops at nearby availability. In case of packaging, female are more inclined towards purchasing of vendor packaged grain based products, fruits and vegetables.

*Table 3: Analysis of variance between food purchase behaviour and demographic characteristics*

| Purchase decisions | Products | Gender | Age | Education | Income |
|---|---|---|---|---|---|
| Frequency of purchase | Grain based products | 4.374** | 0.971 | 0.451 | 1.315 |
| | Fruits | 31.913* | 3.271* | 1.925*** | 9.045* |
| | Vegetables | 0.649 | 1.769 | 0.947 | 1.478 |
| Preferred | Grain based products | 6.107* | 0.977 | 1.767*** | 1.612 |
| marketplace | Fruits | 7.309* | 1.705 | 3.095* | 4.964* |
| | Vegetables | 13.721* | 0.956 | 3.290* | 1.109 |
| Preferred market distance | Grain based products | 0.600 | 2.585** | 1.271 | 6.126* |
| | Fruits | 0.682 | 0.945 | 1.918*** | 9.159* |
| | Vegetables | 0.064 | 1.423 | 1.932*** | 6.095* |
| Preferences on food | Grain based products | 11.057* | 0.342 | 1.635 | 5.134* |
| packaging | Fruits | 14.589* | 1.413 | 0.828 | 4.076* |
| | Vegetables | 13.073* | 0.968 | 0.420 | 4.555* |

*significant at 1% level ** significant at 5% level ***significant at 10% level

The consumers belonging to young and middle age group of less than 35 years prefer frequent purchase of fruits as compared to older consumers. Likewise, consumers of young and middle age group may travel more to purchase grain based products as compared to older consumers. Analysis also clearly indicates that the educated consumers want to travel less for purchasing grain based items. Consumers of higher income group purchase fruits frequently, travel more distances and pay greater attention on packaging of all types of food items.

## 3.1 Consumer response on market attributes

In the emerging modern retailing environment, the formulation of market positioning strategies in congruence with the consumer perceptions on retail outlet attributes result in greater customer loyalty towards an outlet (Devlin et al, 2003). Consumer's choice of a retail outlet depends on a combination of functional and psychological attributes (Devlin et al, 2003). Empirical researches on food retail market attributes in both developed and developing countries show that consumers now prefer one stop shops for all their household requirement to save their time and energy (Burt and Gabbott, 1995; Goldman et al, 2002).

With the evolution of food retail modernization and rapid change in consumers' buying behaviour, there is a need to assess various market attributes while designing effective and efficient food retail market structure as per requirement of the consumers. In India, retail market for food and grocery is underdeveloped and unorganized. Recently, large investments have been made in this segment and to capture the opportunities of growing organized retail market in the country, big corporate organizations have entered into the market. These organizations are in the process of investing financial and other resources to create retail chains throughout the country.

Consumers' preference on various attributes of the modern food retail outlets has been assessed through the questionnaire survey, results of which indicate that offering quality products at lower prices are the most preferred attributes of a good marketplace (Table 4). This implies that Indian consumers are still price conservative and adopt 'cheap and best' strategy while purchasing a product. Apart from this, consumers are also giving due importance to various other facilities and services like car parking, bank, telephone booth and medical shops etc at the marketplace.

### *Table 4: Consumer's response on importance of market attributes*

| Market attributes | Mean | Mode | Std. Deviation |
|---|---|---|---|
| Value/ price | 4.55 | 5 | 2.29 |
| Cleanliness | 4.52 | 5 | 0.67 |
| Freshness | 4.48 | 5 | 0.66 |
| Quality | 3.93 | 4 | 0.79 |
| Variety | 3.75 | 4 | 0.79 |
| Grading | 3.63 | 4 | 1.13 |
| Convenience | 3.45 | 4 | 0.82 |
| Bargaining | 3.42 | 3 | 1.01 |
| One-roof buying/supermarket | 3.39 | 3 | 1.03 |
| Hours of operation | 3.32 | 3 | 1.04 |
| Security arrangement | 3.31 | 4 | 1.10 |
| Serviceability | 3.05 | 3 | 0.94 |
| Shop assistance | 2.99 | 3 | 2.6 |
| Products displays/lighting | 2.87 | 2 | 1.13 |
| Low crowding | 2.61 | 2 | 1.02 |
| Parking facility | 2.49 | 2 | 1.96 |
| Low traffic | 2.37 | 2 | 1.14 |
| Availability of ATM/bank | 2.32 | 1 | 1.35 |
| Home delivery | 2.28 | 2 | 1.11 |
| Children entertainment | 2.06 | 2 | 1.01 |
| Acceptance of credit card | 1.73 | 1 | 1.01 |

*1=Not at all important........5=extremely important

Consumer responses on 21 market attributes have been reduced to 6 sets of related factors through principal component analysis, which explains 65.76 percent of variance (Table 5). First factor can be termed as Atmospherics and Assurance, exhibits heavy loadings for six variables pertaining to the importance of product displays, shop assistance help, low crowding, serviceability and security. One roof buying is another important attribute of the factor which has great importance due to consumers' busy lifestyle. The total variance explained by the first factor is 15.33 percent.

Factor two can be termed as 'Additional facilities' which accounts for 14.33 percent variability of the individual attributes and is defined by four set of attributes relating to parking facilities, low traffic, hours of operation and children entertainment with loadings higher than 0.44. Factor three reflects importance of freshness (for perishable items), cleanness and quality of foods and can be called

### Table 5: Factor analysis - rotated component matrix for market attributes

| Market Attributes | Component | | | | | |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| | Atmosphe rics & Security | Additio nal facilities | Food Quality & Safety | Additio nal Services | Merchan dise | Value for money |
| Products displays/ lighting | **0.826** | 0.100 | 0.134 | 0.065 | 0.048 | 0.041 |
| Shop assistant helps | **0.739** | 0.159 | 0.133 | 0.204 | 0.085 | -0.024 |
| Low crowding | **0.697** | 0.368 | 0.090 | 0.139 | 0.071 | 0.141 |
| Security | **0.582** | 0.169 | 0.310 | 0.001 | 0.021 | -0.144 |
| Serviceability | **0.488** | 0.421 | -0.012 | -0.026 | 0.180 | -0.077 |
| One-roof buying | **0.460** | 0.285 | 0.325 | 0.182 | 0.023 | -0.252 |
| Parking facility | 0.191 | **0.841** | -0.016 | 0.241 | 0.085 | 0.043 |
| Low traffic | 0.242 | **0.813** | -0.012 | 0.248 | 0.083 | 0.062 |
| Hours of operation | 0.248 | **0.744** | 0.159 | -0.012 | 0.046 | -0.173 |
| Children entertainment | 0.298 | **0.440** | -0.141 | 0.393 | 0.221 | 0.040 |
| Freshness | 0.095 | -0.002 | **0.858** | -0.005 | 0.081 | 0.051 |
| Cleanliness | 0.169 | 0.008 | **0.760** | -0.014 | 0.019 | 0.231 |
| Quality | 0.195 | 0.038 | **0.703** | -0.011 | 0.239 | -0.220 |
| Acceptance of credit card | 0.028 | 0.000 | 0.047 | **0.814** | 0.144 | -0.014 |
| ATM/ bank | 0.176 | 0.400 | 0.097 | **0.693** | 0.063 | -0.030 |
| Home delivery | 0.108 | 0.145 | -0.094 | **0.682** | 0.020 | -0.133 |
| Convenience | 0.164 | 0.027 | 0.154 | 0.060 | **0.821** | -0.041 |
| Variety | 0.112 | 0.141 | 0.115 | 0.111 | **0.812** | 0.086 |
| Grading | -0.298 | 0.428 | 0.022 | 0.353 | **0.528** | -0.129 |
| Value/ price | -0.280 | 0.094 | 0.165 | -0.058 | -0.095 | **0.810** |
| Bargaining | 0.384 | -0.204 | -0.103 | -0.166 | 0.159 | **0.658** |
| Total variance explained (%) | 15.329 | 14.331 | 10.454 | 10.246 | 8.795 | 6.603 |
| Cumulative variance explained (%) | 15.329 | 29.66 | 40.115 | 50.361 | 59.155 | 65.758 |

Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.

a Rotation converged in 9 iterations.

'Food Quality and Safety'. This factor accounts for 10.45 percent of the total variability of the attributes. Factor four explains 10.24 percent variation and loads high on factors related to availability of 'Additional Services' like ATM, Bank, home delivery etc. at the marketplace. The fifth component of factor analysis can be grouped as 'Merchandise' as it reflects variety and grading of food products and convenience in getting these items. The sixth and last factor explains 6.60 percent of the total variance and is called 'value for money' as it comprising the factor refers to price and bargaining. Based on consumers' perspective, this analysis clearly categorizes the market attributes, which can be used by the food retailing organizations for making appropriate decisions in designing an effective retail market for food and grocery.

The relationship of underlying factors of market attribute with socio-demographic profiles of consumers have been analysed by using analysis of variance (ANOVA) to assess whether consumer responses vary across market attributes (Table 6). Results estimate that the factor 'Atmospherics and Security' is more important to females, particularly of those who aged above 35 years. This factor is again highly important to consumers who are graduated and also those who belong to higher income groups (more than Rs. 10000 per month). The second factor 'Additional facilities' is again highly attributed to females with older age group, more educated and relatively belonging to the high income groups. The next factor 'food quality and food safety' much realized by 35-45 age groups of people and particularly those who are graduated and also those who belong to very high income groups (above Rs. 25000 per month). The factors 'Merchandise' and 'value for money' are at more concern to male as compared

**Table 6: Analysis of variance between factors and demographic characteristics**

| Factors | Gender | Age | Education | Income |
|---|---|---|---|---|
| Atmospherics & Security | 3.268*** | 2.473** | 4.885* | 15.064* |
| Entertainment & Other facilities | 1.811 | 1.313 | 2.559* | 13.870* |
| Food Quality & Safety | 0.420 | 0.413 | 3.430* | 2.856* |
| Additional Service | 1.763 | 1.113 | 3.423* | 20.978* |
| Merchandise | 4.467** | 0.224 | 3.998* | 6.077* |
| Value for money | 0.031 | 0.823 | 3.501* | 8.891* |

*significant at 1% level ** significant at 5% level ***significant at 10% level

to female. However, 'merchandise' is greatly concerned by more educated and high income groups of shoppers whereas, the factor 'value for money' is at more concern to younger, low educated/ illiterate and those who belong to low income groups (less than Rs. 10000 per month).

## SUMMARY AND CONCLUSION

Consumption patterns in India are rapidly changing from cereal-based food products to high-value food and agricultural products and slowly from fresh, unprocessed, unbranded food products to processed, packaged and branded products. Strong economic growth has brought with it a new set of consumers with sufficient disposable income and those who are more conscious towards health and hygiene. To reap the benefits of the changing consumer behaviour and their capability for buying convenience, quality, variety and packaged food and grocery items, modern organized retail formats are witnessing phenomenal growth throughout the country. This has induced big national and multi-national corporations to enter into organized food retailing.

In the emerging Indian retail environment, this study provides insights on consumers' preferences on food & grocery products and preferred market characteristics with the help of primary survey. Findings of the study clearly indicate that vegetables and fruits are most frequently purchased items from nearby markets as compared to grain-based products. The study addresses issues related to diversified set of preferences on retail store characteristics for efficient management of organized retailing of food and grocery products. High rating of consumers' preferences on product quality alongwith price suggests that food retailing have to be customized as per their requirement. Results of factor analysis of various market attributes clearly indicate that the consumers prefer attractive and secure marketplace with additional facilities and services, where quality products can be acquired at a lower price. The study provides strategic inputs to the upcoming food retail markets regarding the products to be offered at a marketplace and the physical environment of the market.

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