Comparative Study of Traditional Kirana Stores and Modern Organised Retail Outlets

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Abstract

There are serious concerns about the entry of organised retailing in the Indian food sector. What impact will it have on Kirana Store owners and the economy? Based on a study of the Indian food retailing industry, this article indicates that while these concerns are valid, there are more winners than losers in the process. The paper exemplified winners and losers with the help of statistical tools. Moreover, business steps and policy measures, the government can adopt, are also elaborated to resolve the issues of Kirana Stores and Modern Retail Outlets.
Key words: *Food & Grocery; Indian Food Retailing Sector; Kirana Stores; and Modern Retail Outlet.*

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1. INTRODUCTION

Organised food retailing is relatively a new phenomenon in India, with the emergence of small western-style supermarkets since the 1990s. Most of the food products are sold through local 'wet' market vendors, roadside pushcart sellers or small grocery stores. Out of 15 million retail outlets, almost seven million sell food and grocery products. The vast majority of these are small kiosks (17 per cent), general provision stores (14 percent) and grocery stores (56 per cent of all rural retail outlets) run by a single trader and his family (M. Bhasi).

Food and grocery retail in India is poised to grow further. According to KSA Technopak study, food and grocery retail sales have grown from Rs 3,81,000 crore in 1996, to Rs 8,66,000-crore in 2007 (Business Line: January 03, 2007).

The National Sample Survey Organisation (NSSO) 66th round survey, covering the period from July 2009 – June 2010 is based on data collected from over one lakh households. The survey shows an average rural Indian household allocating 53.6 per cent of their total monthly consumption expenditure on food items. The corresponding share for urban household was less, at 40.7 per cent.

All the analysis and forecasts undoubtedly show that food retailing in India has lot of potential and is expected to grow exponentially. In this context, the retail supply chain management takes the central stage in the retail trade.

2. REVIEW OF LITERATURE

Sengupta A, (2008) discusses the birth of the first supermarket, Nilgiri's established in Bangalore in 1971. The emergence of modern retail business in India has a history spanning over 30 years. The paper is on food and grocery retail, biggest in India and the author tries to detail the drivers of revolution and growth focusing on the role of manufacturers, retailers and consumers.

Chetan Ahya (2006) argues that the rising scale of organized retail distribution network and increasing competition will force players to focus on restructuring the whole supply chain to improve productivity and to provide a better deal to the customers.

In her article, Veenu Sharma, throws light on the smaller cities becoming nodes of attraction for the marketers. The infrastructure developments, the changing customers, the ripple effect of the metros on the cities are contributing to the growth of these cities.

These hot-spots are going to bring to the forefront the next wave of new cities that the retailers would be interested in looking at in order to gain 'first mover' advantage and a foothold in the market.

The economic slowdown has significantly increased the pace of shift from national brands to private labels or store brands among the organized retailers. It has increased the private label sales. This migration is not only linked to price (5-10% less than national brands), but also to various factors like improvement in product quality, packaging, presentation and retail experience. The study reports that the rise of private labels is resulting in many conflicts between retailers and brands owing to issues like margins, display and shelf space.

The underdeveloped, traditional, and unidirectional supply chain increases inventory build-up coupled with operational inefficiencies for companies (**Business Line: April 24, 2008**).The spurt in the organised retail business in terms of the number of retail chains across the country testifies the growing acceptance of the modern retail format and the shift in the customer preferences from the

traditional kirana stores to huge retail outlets which have made shopping a pleasant experience. The earlier reluctance to visit the small typical grocery store is replaced by new enthusiasm and excitement on the part of the 21st century consumers. The new realities and changing dynamics of the retail trade prompted the researcher to examine in detail how issues related to supply chain – the critical success factor in the F&G retail format – are addressed. Hence, the research paper entitled has been prepared on the basis of judgement sampling and survey work. **"A Comparative Study of Traditional Kirana Stores and Modern Organised Retail Outlets"**.

3. OBJECTIVES OF THE STUDY
- To assess the degree of competition among the food and grocery (F&G) retail outlets; and
- To determine the performance of the Food and Grocery (F&G) retail outlets using different metrics.

4. TESTING OF HYPOTHESIS
- H_1: Distribution of the sales per square foot of organised retail outlets and the kirana stores are different;
- H_2: Distribution of sales per employee of organised retail outlets and the kirana stores are different; and
- H_3: Distribution of monthly sales of organised retail outlets and the kirana stores are different.

5. RESEARCH METHODOLOGY
The Food and Grocery (F&G) retail segment in India is unique. F&G can be broadly categorised into organised and unorganised retail. The organised retail can be further categorised into corporate retail chains and individual standalone retail outlets. For the purpose of the study, the researcher has considered all the three segments namely, corporate retail chains, standalone retail outlets and kirana stores. The survey has been conducted in Delhi areas in July-September, 2015.

Also, an attempt is made to ascertain the practices adopted by unorganised sector (kirana stores) in comparison with organised sector with respect to the adoption of modern practices.

Table 1: Sources of Information

Universe	Retail outlets (kirana stores, corporate retail chains and standalone retail outlets) in NCR.
Sampling unit	Retail outlets
Sampling Technique	Judgemental Sampling
Primary Sources	a) Structured Questionnaire – Different sets of questionnaires were administered on organised outlets and unorganised kirana stores. b) Personnel Interviews with corporate office personnel, store managers, operators, supervisors of organised outlets and kirana store owners.
Secondary Sources	Journals, Periodicals, Business Magazines, Newspapers, Corporate Retail Chains' Websites, Retail Organisations'/Associations' Websites, pamphlets and catalogues.

Given the structure of the Indian retail sector (F&G) which is still in the 'growth' stage, it was felt appropriate to select the sample units from both organised and unorganised sectors.

6. DATA TABULATION AND ANALYSIS
- Microsoft Access 2007 was used for database creation and data entry purposes.

- Microsoft Access 2007 and Microsoft Excel 2007 were used for data filtering, sorting and drawing charts.
- SPSS Ver 16.0 was used for descriptive analysis, testing of hypothesis (both parametric and non-parametric) and multivariate analysis.

7. ANALYSIS OF THE SURVEY DATA

A study by McKinsey Global Institute (MGI) suggest that if India continues its current growth, average household income will triple in the next 15 years and the private consumption will quadruple to reach Rs 70 trillion in 2025. Indian consumer spending will shift substantially from informal economy, with its individual traders, to the more efficient formal economy of organised businesses. That transition will lower prices and further boost demand. This corroborates the fact that the organised retail in India will gain further momentum and have lot of potential for growth.

With challenging economic conditions in the western world and fear of prolonged slow growth, the focus is shifting to fast growing economies like India. The consistent resilience of Indian economy and healthy domestic consumption growth will accentuate organised food retail which can be sustained through better management of retail supply chain. This is the opportune time for the Indian retailers to establish, strengthen and exploit the supply chain to their advantage. As Government of India may introduce the FDI in multi-brand retail any time now, the retail majors such as Wal-Mart, Tesco and Carrefour will use the 'carpet-bombing' strategy to establish a number of outlets. With their innovative marketing and promotional strategies and the successful supply chain strategies, they try to woo away the Indian customers from the present retailers towards them within the shortest span of time available by 'splitting the market'. So the Indian retailers need to ward off the forthcoming competition by entrenching their supply chain both independently and also collaborating with each other.

When sample data do not meet the basic assumptions that underlie the parametric procedure (e.g. normality or homogeneity of variance), nonparametric methods are used. Kolomogorov-Smirnov test is used to find whether the given distribution is normally distributed or not. Wilcoxon-Mann-Whitney independent two sample test is used to find the independence of two populations.

I. **Comparison of Sales per Sq. foot (Rs.)**

The investigator was interested in comparing the sales per square foot of organised retail outlets and unorganised kirana stores. **Table 2** show the information regarding sales per square foot. Further, non-parametric test was used to test the difference. The result is as follows:

Table 2: Comparison of Sales per Square foot

Sales (Rs.)	Kirana Stores		Organised Outlets	
	No. of Outlets	Percentage	No. of Outlets	Percentage
Less than 250	69	34.5	17	11.3
250 – 500	35	17.5	22	14.7
500 – 750	22	11.0	30	20.0
750 – 1000	15	7.5	48	32.0
1000 – 1250	28	14.0	22	14.7
1250 – 1500	16	8.0	7	4.7
1500 – 1750	5	2.5	2	1.3
1750 – 2000	6	3.0	1	0.7
More than 2000	4	2.0	1	0.7
Total	200	100.0	150	100.0

Source: Field Survey.

Hypothesis$_1$: Distribution of the sales per square foot of organised retail outlets and the kirana stores are different.

One sample Kolomogorov-Smirnov test shows that the metric sales per square foot of kirana stores were not normally distributed ($p < 0.05$). But the sales per square foot of organised retail outlets were normally distributed ($p > .05$) (**Table 3**).

Table 3: One-Sample Kolmogorov-Smirnov Test
(Sales per Square Foot)

		Sales per Sq. Foot	
		Kirana Stores	**Organised Retail Outlets**
N		200	150
Normal Parameters[a]	Mean	663.9800	758.8117
	Std. Deviation	599.30898	363.54617
Most Extreme Differences	Absolute	0.157	0.062
	Positive	0.157	0.062
	Negative	-0.143	-0.050
Kolmogorov-Smirnov Z		2.221	
Asymp. Sig. (2-tailed)		**0.000**	**0.620**
a. Test distribution is Normal.			

Source: Researchers analysis of primary data

Wilcoxon-Mann-Whitney independent two sample test is used to find the independence of the two populations.

Table 4: Mann-Whitney Test (Sales per Square foot)

Ranks				
	Kira_or_Organ	**N**	**Mean Rank**	**Sum of Ranks**
Sales per Sq. ft.	Organised Retail Outlets	150	196.97	29545.50
	Kirana Stores	200	159.40	31879.50
	Total	350		

Source: Researchers analysis of primary data

Table 5: Test Statistics (Sales per Square Foot)

Test Statistics[a]	
	Sales_Sq_Mt
Mann-Whitney U	11779.500
Wilcoxon W	31879.500
Z	-3.438
Asymp. Sig. (2-tailed)	**0.001**
a. Grouping Variable: Kira_or_Organ	

Source: Researchers analysis of primary data

The result (**Table 4 and Table 5**) suggests that there exists statistically significant difference between the underlying distributions of the sales per square foot of organised retail outlets and the kirana stores ($z = -3.438$, $p < 0.05$). Mann-Whitney Test is more conservative than the parametric test such as t-test. The sales per square foot of an organised retail outlet is greater than

that of kirana store. The two sample independent t-test (**Table 6 and Table 7**) does suggest that the sales per square foot is not statistically different (t=1.833, p>0.05).

Table 6: Independent Two-Sample T-test (Sales per Square foot)

Group Statistics				
Kira_or_Organ	N	Mean	Std. Deviation	Std. Error Mean
Organised Retail Outlets	150	758.8117	363.54617	29.68342
Kirana Stores	200	663.9800	599.30898	42.37754

Source: Researchers analysis of primary data

Table 7: Equality of Variances (Sales per Square foot)

Levene's Test for Equality of Variances			t-test for Equality of Means						
Sales_Sq_ft	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
								Lower	Upper
Equal variances assumed	36.66	0.000	1.715	348	0.087	94.832	55.285	-13.902	203.566
Equal variances not assumed			1.833	334.6	0.068	94.832	51.739	-6.9437	196.607

Source: Researchers analysis of primary data

II   Comparison of Sales per Employee (Rs. in Lakhs)

Comparison of the sales per employee of organised retail outlets and unorganised kirana stores was done. **Table 8** showed the information regarding sales per employee. Also, non-parametric test was used to compare the same. The result is as follows.

Table 8: Comparison of Sales per Employee (Rs. in Lakhs)

Organises Retail Outlets				Kirana Stores		
Amount (Rs.)	No. of Outlets	Percentage		Amount (Rs.)	No. of Outlets	Percentage
< 0.3	3	2		< 0.1	21	10.5
0.3 – 0.6	18	12		0.1 – 0.2	30	15
0.6 – 0.9	32	21		0.2 – 0.3	30	15
0.9 – 1.2	21	14		0.3 - .04	22	11
1.2 – 1.5	36	24		0.4 – 0.5	20	10
1.5 – 1.8	24	16		0.5 – 0.6	47	23.5
1.8 – 2.1	6	4		0.6 – 0.7	0	0
2.1 – 2.4	2	1		0.7 – 0.8	22	11
2.4 – 2.7	0	0		0.8 – 0.9	2	1
2.7 – 3.0	4	3		0.9 – 1.0	2	1
3.0 – >	4	3		1.0 - >	4	2
Total	150	100		Total	200	100

Source: Field Survey.   *Source: Field Survey.*

Hypothesis₂ : Distribution of sales per employee of organised retail outlets and the kirana stores are different

One sample Kolomogorov-smirnov test shows that the metric, sales per employee of kirana stores (p<0.04) and organised retail outlets (p<0.03) were not normally distributed (**Table 9**).

Table 9: One-Sample Kolmogorov-Smirnov Test (Sales per Employee)

		Sales per Employee	
		Kirana Stores	**Organised Retail Outlets**
N		200	150
Normal Parameters[a]	Mean	58303	124299
	Std. Deviation	40358	68654
Most Extreme Differences	Absolute	0.099	0.118
	Positive	0.099	0.118
	Negative	-0.075	-0.076
Kolmogorov-Smirnov Z		1.4	1.448
Asymp. Sig. (2-tailed)		**0.04**	**0.03**
a. Test distribution is Normal.			

Source: Field survey and own analysis

So, Wilcoxon-Mann-Whitney independent two sample test is used to find the independence of the two populations.

Table 10: Mann-Whitney Test (Sales per Employee)

	Kira_or_Organ	N	Mean Rank	Sum of Ranks
Sales_Emp.	Organised Retail Outlets	150	240.89	36134
	Kirana Stores	200	126.46	25291
	Total	350		

Source: Field survey and own analysis

Table 11: Test Statistics[a] (Sales per Employee)

	Sales_Emp
Mann-Whitney U	5191.000
Wilcoxon W	25291.000
Z	-10.474
Asymp. Sig. (2-tailed)	0.000

Source: Field survey and own analysis

a. Grouping Variable: Kira_or_Organ.

The result (**Table 10 and Table 11**) suggests that there is a statistically significant difference between the underlying distributions of sales per employee of organised retail outlets and the kirana stores (z = -10.474, p < 0.05). The two sample independent t-test also confirms the same (t = 10.492, p<0.05) (**Table 12 and Table 13**).

Table 12: Group Statistics (Sales per Employee)

	Group Statistics				
	Kira_or_Organ	**N**	**Mean**	**Std. Deviation**	**Std. Error Mean**
Sales_Emp	Organised Retail Outlets	150	124298.7654	68654.31821	5605.60161
	Kirana Stores	200	58303.0200	40358.49528	2853.77657

Source: Field survey and own analysis

Table 13: Equality of Means (Sales per Employee)

Levene's Test for Equality of Variances			t-test for Equality of Means						
Sales_Emp	**F**	**Sig.**	**t**	**df**	**Sig. (2-tailed)**	**Mean Difference**	**Std. Error Difference**	**95% Confidence Interval of the Difference**	
								Lower	**Upper**
Equal variances assumed	16.45	0.00	11.25	348	0.000	65995.75	5866.09	54458.29	77533.2
Equal Variances not assumed			10.492	224.93	0.00	65995.75	6290.22	53600.46	78391.03

Source: Field survey and own analysis

III Comparison of Monthly Sales (Rs. in Lakhs)

Comparison of monthly sales of organised retail outlets and unorganised kirana stores was done. **Table 14** showed the information regarding monthly sales. Also, non-parametric test was used to compare the same. The result is as follows.

Table 14: Comparison of Monthly Sales (Rs. in Lakhs)

Organises Retail Outlets			Kirana Stores		
Amount (Rs.)	**No. of Outlets**	**Percentage**	**Amount (Rs.)**	**No. of Outlets**	**Percentage**
< 5	19	12.7	< - 0.25	21	10.5
5 – 10	23	15.3	0.25 – 0.50	14	7.0
10 – 15	43	28.7	0.50 – 0.75	25	12.5
15 – 20	40	26.7	0.75 – 1.00	0	0.0
20 – 25	6	4	1.00 – 1.25	37	18.5
25 – 30	9	6	1.25 – 1.50	0	0.0
30 – 35	6	4	1.50 – 1.75	48	24.0
35 – 40	3	2	1.75 – 2.00	0	0.0
40 – >	1	0.7	2.00 – 2.25	7	3.5
Total	150	100	2.25 – 2.50	25	12.5
			2.50 – 2.75	3	1.5
			2.75 – 3.00	15	7.5
			3.00 – >	5	2.5
			Total	200	100.0

Source: Field Survey.

Source: Field Survey.

Hypothesis$_3$: Distribution of monthly sales of organised retail outlets and the kirana stores are different.

One sample Kolomogorov-smirnov test shows that the metric monthly sales of organised retail outlets and the kirana stores were not normally distributed (**Table 15**).

Table 15: One-Sample Kolmogorov-Smirnov Test (Monthly Sales)

		Monthly Sales	
		Organised Retail Outlets	**Kirana Stores**
N		150	200
Normal Parameters[a]	Mean	1.4777E6	146838.7500
	Std. Deviation	8.93519E5	92592.35827
Most Extreme Differences	Absolute	0.146	0.142
	Positive	0.146	0.142
	Negative	-0.088	-0.078
Kolmogorov-Smirnov Z		1.786	2.004
Asymp. Sig. (2-tailed)		**0.003**	**0.001**
a. Test distribution is Normal.			

Source: Field survey analysis

The Wilcoxon-Mann-Whitney test is used to test the hypothesis

H_0: The two samples come from same populations.

H_1: The two samples come from different populations.

Table 16: Mann-Whitney Test (Monthly Sales)
Ranks

	Kira_or_Organ	N	Mean Rank	Sum of Ranks
Month_Sales	Organised Retail Outlets	150	275.09	41263.00
	Kirana Stores	200	100.81	20162.00
	Total	350		

Source: Field survey analysis

Table 17: Test Statistics (Monthly Sales)

Test Statistics[a]	
	Month_Sales
Mann-Whitney U	62.000
Wilcoxon W	20162.000
Z	-15.972
Asymp. Sig. (2-tailed)	0.000
a. Grouping Variable: Kira_or_Organ	

Source: Field survey analysis

The result (**Table 16 and Table 17**) suggests that there is statistically significant difference between the underlying distributions of the monthly sales of organised retail outlets and the kirana stores (z = -15.972, p < 0.05).

The two sample independent t-test also proves the same (t = 18.17, p<0.05) (**Table 18 and Table 19)**

Table 18: Independent t-Test (Monthly Sales)

Group Statistics					
	Kira_or_Organ	N	Mean	Std. Deviation	Std. Error Mean
Month_Sales	Organised Retail Outlets	150	1.4777E6	8.93519E5	72955.54046
	Kirana Stores	200	146838.7500	92592.35827	6547.26844

Source: Field survey analysis

Table 19: Test for Equality of Means (Monthly Sales)

Levene's Test for Equality of Variances			t-test for Equality of Means						
Monthly Sales	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
								Lower	Upper
Equal variances assumed	147.387	0.000	20.925	348	0.000	1.33E+06	63602.33	1.21E+06	1.46E+06
Equal variances not assumed			18.17	151.402	0.00	1.33E+06	73248.74	1.19E+06	1.48E+06

Source: Field survey analysis

8. CLUSTER ANALYSIS

Cluster analysis 100 is a collection of statistical methods, which identifies groups of samples that behave similarly or show similar characteristics. In common parlance it is also called look-a-like groups. The simplest mechanism is to partition the samples using measurements that capture similarity or distance between samples. In this way, clusters and groups are interchangeable words. Often in market research studies, cluster analysis is also referred to as a segmentation method.

Analysis 1: An attempt is made to segment the organised outlets on the basis of select parameters such as area (sq. ft.), number of customers, footfalls, catchment area (sq. kms), monthly sales, expenditure and PBDIT. The cluster analysis resulted in 3 distinct clusters. The first cluster of outlets is of small category, the second one is of medium category and the third cluster of outlets is of large category. The percentage of outlets in each cluster is 16%, 33% and 51% respectively. They are as follows (**Table 20**).

Table 20: Clusters based on performance

Cluster	1	2	3
Area (Sq. ft.)	1000 – 1500	1500 – 2500	2000 – 3000
No. of Customers	1000 – 2000	1000 – 2000	1500 – 3000
Footfalls	100 – 200	100 – 300	200 – 400
Catchment Area (Sq. Kms)	1 – 2	2 – 4	2 – 4
Monthly Sales (Rs. In Lakhs)	1 – 15	5 – 20	5 – 40

Expenditure as percentage of Sales	51 – 80	70 – 90	61 – 90
PBDIT (in Rs.)	Upto 3 Lakhs	Upto 4 Lakhs	2 - 7 Lakhs
No. of SKUs	1500 – 3000	2000 – 3000	2000 – 5000
No. of Outlets	24	49	77
Percentage	16	33	51

Source: Field survey analysis

Analysis 2: Cluster analysis is used to segment the outlets on the basis of time spent and amount purchased by customer groups. The analysis resulted in 3 clusters and they are as follows (**Table 21**). The first cluster consisted of outlets where the customers in different groups spent less time and made less purchases. This group constituted about one-fifth (19%) of the outlets surveyed. The second cluster, a major cluster, constituted about half (50%) of the outlets. In this kind of outlets, the customers spent more time and made more purchase. In the third kind of outlets, the time spent and purchases made was maximum among the clusters.

Table 21: Clusters Based on Customer Groups

Cluster	Customers visit with Family		Customers visit with Friends		Customers visit Alone		Outlets	
	Time Spent	Amt Purchased	Time Spent	Amt Purchased	Time Spent	Amt Purchased	No.	%
1	21 – 30	500 – 1000	11 – 20	250 – 500	< 10	< 250	29	19
2	31 – 40	750 – 1500	21 – 30	500 – 750	11 – 20	250 – 500	77	51
3	41 – 50	1000 – 1500	31 – 40	500 – 1000	21 – 30	500 – 1000	44	29

Source: Field survey analysis

9. CONCLUDING RESULT

- Mann-Whitney and Wilcoxon Tests showed that there is statistically significant difference between the underlying distributions of monthly sales of organised retail outlets and the kirana stores. The monthly sales of an organised outlet was higher.
- Mann-Whitney and Wilcoxon Tests result showed that there is statistically significant difference between the underlying distributions of the sales per square foot of organised retail outlets and the kirana stores. The sales per square foot of an organised outlet was higher.
- Mann-Whitney and Wilcoxon Tests showed that there is statistically significant difference between the underlying distributions of sales per employee of organised retail outlets and the kirana stores. The sales per employee of an organised outlet was higher.

10. SUGGESTIONS

- Kirana stores should start using modern methods of doing business. They should start taking the franchise of famous brands to increase the variety in the shops.
- Visual merchandising can be an added advantage for the growth of kirana.
- Government should start some training programmes for kirana marchants and provide them with the low rate loan facilities.

- They should start giving the facilities of free offer discount etc on special occasions or on bulk purchasing.
- Use a suggestion box and customer want slips.
- Accept Visa, Mastercard etc.
- Train employees to service and work with customers in a professional manner.
- Call customers to let them know when new items have arrived.
- Set up an inventory control system in regards to shrinkage, performance, amount of merchandise, mark-up, profit and turnover.
- Determine whether to price certain items below, at, or above the market.
- Government should make a policy that nobody can open a mall in the area where there are already more than 5 shops in area nearby or it should establish certain zones within which the malls can operate. Malls should be established outside the city.
- Foreign investment should come with alliances to these shopkeepers.
- There should be consolidation policy for the shopkeepers. It means instead of opening small shops, in a particular area shopkeepers must unite and open up big showroom and divide the profit according to the partnership.

11. CONCLUSION

The Indian Retail sector operates in a unique and complex environment. Indian economy cannot deny the positive effects of FDI and self owned business for growth. It should take lesson from the recent global slowdown and should not forget the role of retail sector to save India from its drastic effects. The need of the hour is to reengineer the operations of Kirana stores otherwise the big giants will leave no space for them to grow. If the Kirana stores improve their functioning and the area of operation shall be specified by the government then there will be win-win situation for both the parties.

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