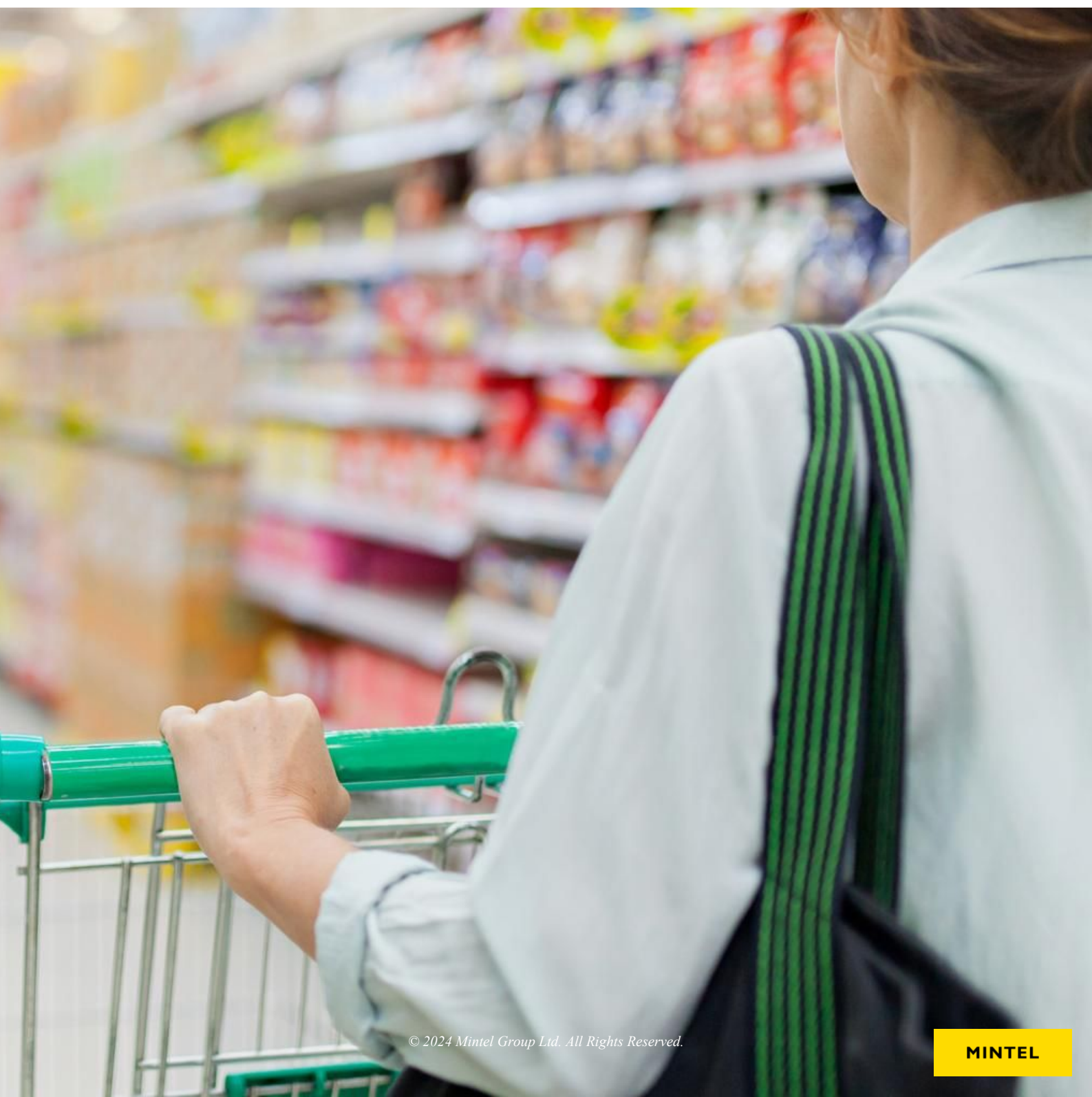


SHOPPING FOR GROCERIES – INDIAN CONSUMER – 2018

Convenience drives grocery shopping decisions – whether online or in-store – leading to opportunities for innovation focused on convenience backed by technology.



Rimpie Tulsiani, Sr. Beauty
& Personal Care Analyst,
India



Report Content



EXECUTIVE SUMMARY

- What you need to know – Summary
- Convenience along the consumer journey experience drives decisions
- Kirana shops remain the cornerstone
- Adopt an omni-channel approach to reach a diverse audience
- Provide time-saving solutions
- Enhance in-store experience to differentiate from, and protect against, online competition
- Lock in consumers by offering various conveniences in-store and beyond
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Recognise food reverence in India
- Help urban consumers save time as they aspire for more in their personal lives
- Highlight ease to time-pressed urban Indian consumers
- Capitalise on e-commerce
 - Graph 1: Retail market value, e-commerce, 2010-16
- India's e-commerce market is growing by leaps and bounds
- Online grocery is one of the fastest growing segments for e-commerce
- Major e-commerce players foray into the grocery space in India
 - Graph 2: Number of downloads on Android phones, select online shopping apps, February 2018
- Offer digital payment options as Indians become more comfortable with online transactions
 - Graph 3: Digital transaction volumes, Nov 2016-Dec 2017
- A plethora of payment options emerge in India's retail space

Global trends and how they are playing out in India

- Introduce ways to save time and perfect productivity
- Automate basic transactional functions, retain humans where customer service matters
- Indian supermarket chain trials self-checkout
- BYOB: bring your own bags
- Offer cloth/jute bags to take away the worry of carrying bags – and don't forget the branding

CONSUMER INSIGHTS

- What you need to know

Who is shopping for groceries

- Nearly all urban consumers shop for groceries: opportunity for grocers to target a niche segment as well as appeal more broadly
- Consider the shopper and design communication, promotions, amenities around the target
 - Graph 4: Extent of grocery shopping responsibility, by employment, household composition and marital status, February 2018
- Don't forget men. Indian women primarily responsible, but men influence and are involved
 - Graph 5: Extent of grocery shopping responsibility, by gender, February 2018
- Make grocery shopping a fun outing for families
 - Graph 6: 'Grocery shopping is enjoyable' – Any agree, by household composition, February 2018

Where consumers shop

- Indians prefer neighbourhood stores for weekly shopping
- Promote loyalty programmes, customise offers to make customers feel valued and want to return
 - Graph 7: Frequency of grocery shopping, by store type, February 2018
- Offer special top-up coupons/discounts to draw in repeat visits in the same month

What drives shopping decisions

- Convenience is more important than low prices when deciding where to shop
 - Graph 8: Top factors deciding where to shop for groceries, February 2018
- Help consumers plan out their grocery shopping
- Save shoppers' time while in store
- Target different consumers based on what's most important to them in the grocery shopping destination
- Online supermarkets: attract more shoppers with Indian products
 - Graph 9: Factors in deciding where to shop for groceries – Brands, by select store type (once a week or more often), February 2018

What's next in grocery retailing

- Enhance the shopping experience to drive loyalty
- Organic foods hold potential for Indian grocers
- Online grocers in a position to grow
- Online grocery shopping is for everyone

MARKET APPLICATION

- Opportunities: key areas of focus

Opportunities

- Opportunity to launch private label organic staples
 - Graph 10: Growth in organic food and drink launches (not including alcohol), 2013-17
- Organic food sales in India largely driven by staples, opportunity for packaged foods to grow
- Create synergy between kirana stores and online model

Who's innovating

- Develop services to align with consumer behaviours such as DMart and its 'click-and-collect' service
- Expand online to offline: BigBasket offers kiosks stocked with everyday necessities to attract the neighbourhood store/kirana shopper
- Reliance Jio capitalises on kirana network
- Big Bazaar gets aggressive with 'Har din low prices', the Walmart way

Global innovators

- Automatic checkout systems answer the need for speed
- Global innovations: smarter, faster, automatic
- Myanmar retailer encourages shoppers to use less plastic

APPENDIX

- Consumer survey data
- Definitions and terms

MINTEL INDIAN CONSUMER - OTHER REPORTS AVAILABLE

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

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