Impact of the Competition from International Food Service Retail Outlets on the Quality Attributes of Indian Food Service Retail Outlets

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Abstract:

An analysis of the impact of the competition from international food service retail outlets on the quality attributes of Indian food service retail outlets sheds light on how to compete in such an environment and what should be the strategic marketing approach for the Indian retailers. This paper focused on the factors of quality in Indian retail outlets, affected by the cut throat competition; and needed to be improved from retailers' perspective. Firstly, the present research study tried to find out the major factors that determine important attributes of quality of Indian food service retail outlets impacted by the competition from international food service retail outlets. For this purpose factor analysis was performed to identify major factors. Secondly, the research study tested several hypotheses related to important independent variables / attributes of quality associated with Indian / international food service retail outlets. The independent variables include customer expectation, awareness, satisfaction,

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pricing, food quality, delivery process, ambience and the competence level of the employees. Chi square analysis was used to ascertain the association between the independent variables and the dependent variables. 150 retailers (managers or higher level) were surveyed out of which 44 respondents were international food service retailers; and 106 respondents were Indian food service retailers. The results showed that for Indian food service retailers, there is need to improve quality, hygiene, ambience, delivery process and the competence of its employees.

I. INTRODUCTION

1.1. Context

Indian food service retail market is witnessing extensive competition in the recent decade. Traditional food retailers as well as organised Indian food service retail outlets both are facing tough competition from international food service retailers. Indian Food service retailers are trying their best to attract, satisfy and retain consumers. And in order to remain in the market, they are endeavouring to stay modest by making more cherished and novel shopping experiences for the customers. Extensive competition, growing customer expectations, changing consumer preferences are forcing and motivating Indian fast food retailers to evaluate their quality and measure the satisfaction of the customers.

According to a report (**Fast Food in India, 2017** – Predictions and Strategy, SWOT and Corporate Finance Report (www.einpresswire.com/article/410169665/fast-food-in-india-2017-predictions-and-strategy-swot-and-corporate-finance-report) 'fast food sector in India, grew at twelve percent in present value in 2016. This growth in the past was motivated

by the dynamic life styles of Indian consumers, which led consumers to prefer an alternative arrangement for their food habits. This is happening especially because of the young population of Indians, as the average age of nearly 50% of Indian consumers is still below 30 years of age. Despite growing health awareness among young Indian consumers, still, the consumption of fast food has not been changed.'

According to **India Food Report, 2016,** (By Progressive Grocer Bureau February 14, 2016), 'India's Food Retail sector comprising Food & Grocery and Food Service is valued at Rs 25,12,962 crore (2014) and holds a 65 per cent share in the country's total retail market. Out of this, Food & Grocery Retail is worth Rs 23,03,496 crore, and the food service retail market is valued at Rs 2,09,466 crore. The average rate of food service retail growth during the last four years has been 15% per annum, and in food service, it has been 22% per annum. The corresponding growth rates are anticipated to take these food service retailing to Rs 54,20,789 crore & Rs 6,90,672 crore in the future by 2020.

Information from the Report revealed that over the next 6 years the food service retail market is supposed to record an average growth rate of 5.3% per annum. The pace of growth is supposed to be slightly higher at 5.7 per cent per annum between 2020-21 and 2025-26. Both urban growth patterns and rural growths are expected to be leading during the next decade as compared to the decade ending 2014-15.

The report examines India's Food service organised retail sector and what it has to offer to both domestic and international retail investors, in all aspects of growth and business.'

1.2. Significance and Justification of the Study

Indian food retail industry is facing challenges from organized international food retailers. But, the entry of international

players in the field of organized food retailing changed the quality standards and the expectation level of the consumers. In order to survive in the extensive competition, international food retailers will have to understand the consumer preferences and the dynamic demography of Indian. And Indian Food retailers will have to do a comprehensive analysis of the market, changed consumer preferences and expectation level. It will be difficult for the Indian fast food retailers to compete with international players until they maintain international standards of the quality, product and service offerings.

Research Questions

Indian or international fast food retailers are doing market research to know consumers' preferences, consumers' expectation level for food service quality standards. Following research questions addressed the major issue of impact of the competition from international food service retail outlets on the quality attributes of Indian food service retail outlets-

- What is the impact of the competition from international food service retail outlets on the quality attributes of Indian food service retail outlets?
- What are the Important Attributes of Quality that are to be improved?
- What is the association of the quality attributes and the Indian and international fast food retail outlets.
- What attracts consumers towards international food outlets?
- What attracts consumers towards Indian organized food outlets?

There have been several investigations into the food retail industry, but there are still very few researches in the field of fast food retail industry and the factors determining the

consumer preferences for the international / Indian food outlets. The findings of the present research provide improved understanding of consumer preferences for the international / Indian food retailers.

1.3. Research Hypotheses & Objectives
Following research hypotheses & research objectives are developed to address the research problem.

Research Objective-1: To identify the factors that determine important attributes of quality that are Impacted by the competition from international food service retail outlets

Research Objective-2: To study the association between the important attributes of quality impacted by competition (independent variables) and the type of food service retail outlets (Indian / international- dependent variables).

*Alternate Hypothesis (H1)-1: There is an Association between 'Increased customer satisfaction' and **Type of Retail Outlet.***
*Null Hypothesis (H0):1: There is no Association between 'Increased customer satisfaction' and **Type of Retail Outlet.***
*Alternate Hypothesis (H1)-2: There is an Association between 'Increased customer awareness' and **Type of Retail Outlet.***
*Null Hypothesis (H0):2: There is no Association between 'Increased customer awareness' and **Type of Retail Outlet.***
Alternate Hypothesis (H1)-3: There is an association between 'Increased customer expectations' and type of retail outlet.
Null Hypothesis (H0):3: There is no association between 'Increased customer expectations' and type of retail outlet.

Alternate Hypothesis (H1)-4: There is an association between *'lessen the sales' and type of retail outlets.*

Null Hypothesis (H0):4: There is no association between *'lessen the sales' and type of retail outlets.*

Alternate Hypothesis (H1)-5: There is an association between *'Indian food market has to keep competent employees' and type of retail outlets.*

Null Hypothesis (H0):5: There is no association between *'Indian food market has to keep competent employees' and type of retail outlets.*

Alternate Hypothesis (H1)-6: There is an association between *chefs' switch over* and *type of retail outlets.*

Null Hypothesis (H0):6: There is no association between *chefs' switch over* and *type of retail outlets..*

Alternate Hypothesis (H1)-7: There is an association between *'Improve the Process'* and *type of retail outlets.*

Null Hypothesis (H0):7: There is no association between *'Improve the Process'* and *type of retail outlets.*

Alternate Hypothesis (H1)-8: There is an association between *'Indian food market' has improve Customer Service"* and *type of retail outlets.*

Null Hypothesis (H0):8: There is no association between *'Indian food market has improve Customer Service'* and *type of retail outlets.*

Alternate Hypothesis (H1)-9: There is an association between *'Indian food market has to improve ambience / interiors'* and *type of retail outlets.*

Null Hypothesis (H0):9: There is no association between *'Indian food market has to improve ambience / interiors'* and *type of retail outlets.*

Alternate Hypothesis (H1)-10: There is an association between 'Maintain Quality' **and type of retail outlets.**

*Null Hypothesis (H0):10: There is no association between 'Maintain Quality' **and type of retail outlets.***

II. LITERATURE REVIEW

Organized fast food retailing industry in India is still in the beginning stage. Generally, Indians prefer eating at home which is instilled in Indian tradition. There is a very slow pace of changes in eating habits of Indians, particularly in rural India. After three decades, Indians accepted Chinese dish chowmein in the form of Maggi noodles. Though researches have proved that there were several other reasons to accept Maggi, yet it was accepted as it was easy to cook in very less time.

The concept of 'international or Indian organised food retailing' includes several concepts related to food and service marketing consists of all the seven Ps;

- Product,
- Price,
- Place,
- Promotion,
- Process,
- People and
- Physical evidence.

Organised retailers are focusing on the consumer behaviour towards-

- Food retail outlets
- Chains
- Franchise.

Organised retailers are investing heavily on the market research in order to make consumers aware and attract and also to know the preferences of the consumers of the local market. Global organised food retailers such as KFC,

McDonalds, Pizza Hut, Domino's Pizza etc. are thinking in global terms but are acting as per the local needs. Thus, it is resulting in the cut throat competition among traditional Indian food outlets and international food outlets.

Indian economy is growing very fast in past decade and if the growth continues at the same pace till the next decade; Indian income levels would be triple what it is right now, as the average real household disposable income will also grow. And ultimately it will lead to increase in expenditure and consumption and will certainly create vast opportunities for the business in India.

India is a developing country developing country where consumers spend a larger share of their income on food. Consumption of processed and ready-to-eat foods is higher in urban areas, reason are-

- Higher disposable incomes,
- Time saving
- Developing interest in international cuisines.

The Food Service retail industry is providing employment to lakhs of Indians as well as giving tax to the state and government.

2.1. Food service retail outlets and Mall Culture

In the last decade, India witnessed very fast development of the mall culture. Increasing numbers of the shopping malls are changing the marketing approach of the fast food retailers. To attract consumers over the years, malls have endeavoured to forestall and counter to fluctuating and dynamic customer needs and wants. According to Y. K. Kim, (2002), 'shopping malls have shifted towards increasing their social and entertainment offerings, allowing them to compete with the more "functional" internet shopping.

In his research, C.A. Martin, (2009), described malls that one source of entertainment and differentiation is food outlets, which is one of the few areas of retailing that is resistant to online competition. Strangely, the number of research studies exploring customer preferences for food courts in shopping centres is relatively small.

K. Kalcher in 2009, and Sirpal and Peng (1995) studied the impact of food courts on retail spending in U.S. and Singapore malls respectively and found that after the introduction of the food court there was an increased percentage of first-time visitors, increased frequency of visits, and increased length of time spent in the centre. Eating at the food court was cited as one of the major purposes of visiting the mall.

A study by R. Srivastava, (2008), on the retail industry in India revealed that the retailing concentration there is changing towards satisfying many different needs of consumers, including facilities for family outings such as cinema theatres, food courts, and play places for children. While that study focused solely on the developing Indian retailing market, it may provide broader insight on changes in consumers' approach to shopping trips; consumers may be looking for a more holistic experience on their shopping trips and not focus solely on retail stores. (Taylor, W. J., & Verma, R., 2010)

Brand Value of the International Competitors

After studying dynamic environment of the food service retailing in India, we would like to consider another very important fact that is international competitors. Major international players in food service retailing are-

- Mc Donald's
- KFC
- Domino's Pizza

- Pizza Hut

Here it would be relevant for us to mention the brand value of these aforementioned international brands.

INTERNATIONAL FAST FOOD RETAILERS	BRAND VALUE (in million US Dollars)
• Mc Donald's	97723
• KFC	13521
• Domino's Pizza	6289
• Pizza Hut	8133

Now, after considering these figures of brand value, level of competition must be anticipated, especially by the Indian food service retailers while designing marketing and advertising strategies.

III. RESEARCH METHODOLOGY

This chapter defines the research design, theoretical framework, hypothesis development, research objectives, population samples, data collection procedures and the techniques of data analysis for examining the factors that affect quality of Indian fast food retail outlets due to the competition from international fast food service retail outlets in KAVAL, U.P., India. The said factors are related to the Product dimension that is quality of the food served, Services and delivery dimension and Quality dimension of fast food outlets' attributes. This research is **exploratory** in nature. A survey was designed to measure the consumers' preference for international and Indian food service retail outlets with the help of the **questionnaires and schedules** using five points **LIKERT scale** such as strongly agree-1, agree-2, neutral-3, disagree-4, and strongly disagree-5.

To collect information / **primary data** for the research purpose, we have used *quota sampling*. The target population, to which we would like to draw inferences,

comprises the consumers visiting international and Indian food service retail outlets KAVAL, UP in India, which can be said as the **universe** of the study. We know that the population is heterogeneous in nature which is an advantage for the sampling, as it reduces the biases of the data. This research study is comparative in nature, so the data of retailers from both the international and Indian food service retail outlets have been used. The survey was conducted on the retailers to collect the data. The total **Sample size** was of **150 retailers** (manager or higher level); out of which **44** respondents were international food service retailers and **106** respondents were Indian food service retailers. For the analysis of the data, IBM SPSS STATISTICS 20 version software has been used to perform Frequency analysis, Factor analysis and Chi square analysis.

IV. DATA ANALYSIS, INTERPRETATION & FINDINGS

4.1 Demographic Profile of the Retailers

Table 4.1 Age

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Below 25 years	11	7.3	7.3	7.3
	25-40 years	110	73.3	73.3	80.7
	Above 40 Years	29	19.3	19.3	100.0
	Total	150	100.0	100.0	

Interpretation: From the above table it can be seen that out of total 150 respondents (retailers) 7.3% respondents belong to the below 25 years age group, 73.3% respondents belong to the 25-40 years age group and 19.3% respondents belong to the above 40 years age group.

Table-2: Type of Retail Outlet

TYPE OF RETAIL OUTLET					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	International Food service retailers	44	29.3	29.3	29.3
	Indian Food service retailers	106	70.7	70.7	100.0
	Total	150	100.0	100.0	

Interpretation: From the above table it can be seen that out of total 150 respondents (retailers), 29.3% respondents were working in international fast food retail outlets, 70.7% respondents were working in Indian food service retail outlets.

4.2. FACTOR ANALYSIS: Factors that determine Important Attributes of Quality: Impact of the competition from international food service retail outlets on the **quality attributes of Indian food service retail outlets.**

Factor Analysis was performed to extract the most important Factors that determine most important attributes of quality that are impacted by the competition from international food service retail outlets.

Table-3: KMO and Bartlett's Test

KMO and Bartlett's Test		
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.535
Bartlett's Test of Sphericity	Approx. Chi-Square	1350.492
	df	91
	Sig.	.000

Adequacy of the data is tested on the basis of results the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity (homogeneity of Variance) provided in **table-3,** the KMO measure of sampling adequacy is **0.531**, which indicates the present data is suitable for factor analysis. Similarly, Bartlett's test of sphericity is significant ($p < 0.001$); that explains existence of sufficient correlation between variables to proceed with the analysis.

Table-4: Communalities

Communalities		
	Initial	Extraction
Increased customer expectations	1.000	.678
Increased customer awareness	1.000	.870
Increased level of customer satisfaction	1.000	.868
Lessens the sales	1.000	.867
Lessens the profit	1.000	.912
Chefs switch over	1.000	.787
High advertising costs	1.000	.862
Keep variety of foods	1.000	.780
Maintain quality	1.000	.606
Prices must have value for money	1.000	.865
Indian food market has to improve customer service.	1.000	.681
Indian food market has to keep competent employees.	1.000	.869
Improve Process.	1.000	.786
Indian food market has to improve ambience / interiors.	1.000	.652
Extraction Method: Principal Component Analysis.		

Table-5: Total Variance Explained

Total Variance Explained									
Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	3.869	27.634	27.634	3.869	27.634	27.634	3.031	21.652	21.652
2	2.325	16.606	44.240	2.325	16.606	44.240	2.423	17.306	38.958
3	2.046	14.611	58.851	2.046	14.611	58.851	2.099	14.995	53.954
4	1.794	12.811	71.662	1.794	12.811	71.662	1.771	12.649	66.603
5	1.052	7.512	79.174	1.052	7.512	79.174	1.760	12.571	79.174
6	.824	5.887	85.061						
7	.542	3.869	88.930						
8	.489	3.496	92.426						
9	.366	2.612	95.038						
10	.216	1.546	96.583						
11	.196	1.398	97.982						
12	.134	.955	98.936						
13	.093	.662	99.598						
14	.056	.402	100.000						
Extraction Method: Principal Component Analysis.									

Interpretation & Findings:

In table-5, this output lists the eigen values associated with each linear component (factor) before extraction, after extraction and after rotation. Before extraction, Output has

identified 14 linear components within the data set. It should be clear that the first few factors explain relatively large amounts of variance (especially factor 1) whereas subsequent factors explain only small amounts of variance. **Then all factors with Eigen values greater than 1 are extracted**, which leaves us with 5 **factors**. According to Kaiser Criterion, only first **5 factors** should be used because subsequent eigenvalues are less than 1.

The 3 factors that explain maximum percentage of total variance.
So, factor 1 explains 27.634% of total variance, factor 2 explains 16.606% of total variance & factor 3 explains 14.611% of total variance.

As evident from the **table-5** (Total Variations Explained) we find out that from the total 14 components (play role in impacting Indian food service retail outlets), 3 factors are extracted and these 14 factors together account for only **79.174%** of the total variance (Information contained in original 14 variables) hence we have reduced the number of variable from 14 to 5 underlying factors.

Figure-1: Cartell's Scree test
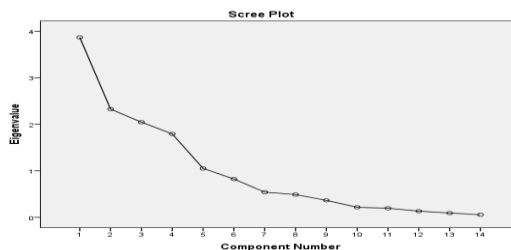
Cartell's Scree test (**Figure-2**) involves plotting each of the eigenvalues of the factors and inspecting the plot to find a point at which the shape of the curve changes direction and becomes horizontal. This test recommends retaining all factors above the

elbow or break in the plot as these factors contribute the most to the explanation of the variance of the data set.

Usually the number of factors can also be extracted using the scree plot yet such a decision may be rather subjective. The analysis also showed that 5 factors may be obtained, as the line afterwards was almost straight. *After careful examination researcher decided to obtain 3 factors as they produce the most meaningful solution.*

Table-6: Component Matrix

Component Matrixa					
	Component				
	1	2	3	4	5
Increased customer expectations	.731	.233	.231	-.186	.039
Increased customer awareness	.655	.513	.346	.122	-.207
Increased level of customer satisfaction	.703	.311	.508	-.130	-.039
Lessens the sales	-.457	.698	.160	.382	.000
Lessens the profit	-.228	-.424	.369	.447	.587
Chefs switch over	.615	-.313	.405	-.368	.108
High advertising costs	.633	.169	-.155	.497	.401
Keep variety of foods	.248	.269	-.651	-.029	.470
Maintain quality	.705	.008	-.282	.159	.055
Prices must have value for money	.065	-.408	.682	.478	.039
Indian food market has to improve customer service.	.042	-.692	-.168	.296	-.293
Indian food market has to keep competent employees.	-.545	.511	.225	.488	-.151
Improve Process.	-.489	-.066	.434	-.533	.266
Indian food market has to improve ambience / interiors.	-.520	.365	.170	-.368	.289
Extraction Method: Principal Component Analysis.					
a. 5 components extracted.					

Table-7: Rotated Component Matrix

Rotated Component Matrixa					
	Component				
	1	2	3	4	5
Increased customer expectations	**.761**	-.252	-.047	-.075	.166
Increased customer awareness	**.885**	.190	-.203	-.091	.035
Increased level of customer satisfaction	**.923**	-.121	.007	.035	-.020
Lessens the sales	.038	**.903**	.220	.011	.029
Lessens the profit	-.233	.012	.107	**.917**	.078

Chefs switch over	.535	**.670**	.050	.194	-.106
High advertising costs	.382	.048	-.396	.285	**.690**
Keep variety of foods	-.075	-.065	-.003	-.251	**.841**
Maintain quality	.344	-.246	**.474**	-.072	.444
Prices must have value for money	.184	.018	-.197	**.807**	-.376
Indian food market has to improve customer service.	-.370	-.293	**.597**	.200	-.251
Indian food market has to keep competent employees.	-.072	**.902**	.089	.105	-.177
Improve Process.	-.129	-.133	**.797**	.140	-.312
Indian food market has to improve ambience / interiors.	-.112	.241	**.758**	-.085	-.007
Extraction Method: Principal Component Analysis.					
Rotation Method: Varimax with Kaiser Normalization.					
a. Rotation converged in 8 iterations.					

Table-8: Component Transformation Matrix

Component Transformation Matrix					
Component	1	2	3	4	5
1	.717	-.438	-.442	-.036	.313
2	.446	.679	.288	-.417	.289
3	.526	.086	.330	.544	-.557
4	-.078	.565	-.617	.519	.155
5	-.068	-.143	.481	.509	.696
Extraction Method: Principal Component Analysis.					
Rotation Method: Varimax with Kaiser Normalization.					

Conclusion: Factors that determine the Impact of the competition from international food service retail outlets on the quality attributes of Indian food service retail outlets.

In the present study Factor Analysis exhibits the factor loading for the statements (Variables). Looking at Rotated Component Matrix (**Table-7)**, we find out that

Factor/Component 1 contains the **3** items-

1. Increased level of customer satisfaction
2. Increased customer awareness
3. Increased customer expectations

While the **Factor/Component 2 contains** the 02 items-

1. Lessens the sales
2. Indian food market has to keep competent employees.
3. Chefs switch over

While the **Factor/Component 3 contains** the 02 items-

1. Improve Process.
2. Indian food market has to improve ambience / interiors.
3. Indian food market has to improve customer service.
4. Maintain quality

Hence, we can say that our Research Objective-1 is fulfilled.

4.3. CHI SQUARE & Cross tabulation: ASSOCIAION BETWEEN TYPES OF RETAIL OUTLETS AND QUALITY ATTRIBUTES: RETAILErs' perspective

4.3.1. Analysis: Analysis of the Association between '**Increased customer satisfaction**' and **Type of Retail Outlet.**

H_0**:** The two factors are independent.

H_1**:** The two factors are not independent (associated).

Table-9: Chi-Square Test

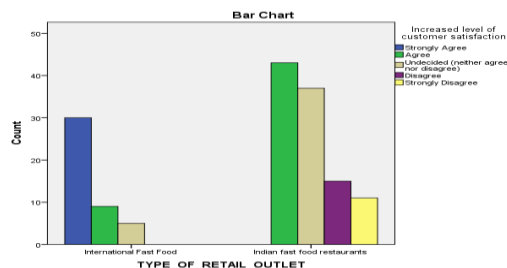| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	92.848[a]	4	.000
Likelihood Ratio	102.955	4	.000
Linear-by-Linear Association	54.706	1	.000
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 3.23.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-1** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-10: Crosstab: Increased level of customer satisfaction

Crosstab								
			Increased level of customer satisfaction					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	count	30	9	5	0	0	44
		% within types of retail outlet	68.2%	20.5%	11.4%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	count	0	43	37	15	11	106
		% within types of retail outlet	0.0%	40.6%	34.9%	14.2%	10.4%	100.0%
Total		count	30	52	42	15	11	150
		% within types of retail outlet	20.0%	34.7%	28.0%	10.0%	7.3%	100.0%

FINDINGS: From the above table it can be seen that all the 44 International Food Service Retailers, 88.7% respondents either strongly agreed or agreed that entry of international retailers impacted Indian retail market with increased level of customer satisfaction. And out of 106 Indian fast food retailers, 40.6% respondents agreed that entry of international retailers impacted Indian retail market with increased customer expectation. But, 24.6% Indian fast food retailers (respondents) either disagreed or strongly disagreed on the same.

4.3.2. Analysis: Analysis of the Association between 'Increased customer awareness' and **Type of Retail Outlet.**

H$_0$: The two factors are independent.

H$_1$: The two factors are not independent (associated).

Table-11: Chi-Square Test

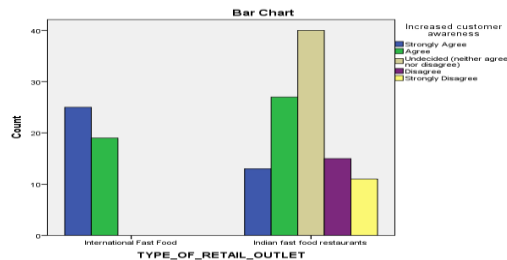| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	54.940[a]	4	.000
Likelihood Ratio	70.338	4	.000
Linear-by-Linear Association	44.559	1	.000
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 3.23.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-2** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-12: Crosstab: Increased customer awareness

Crosstab								
			Increased customer awareness					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
Types of Retail Outlets	International Food Service Retailers	count	25	19	0	0	0	44
		% within types of retail outlet	56.8%	43.2%	0.0%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	count	13	27	40	15	11	106
		% within types of retail outlet	12.3%	25.5%	37.7%	14.2%	10.4%	100.0%
Total		count	38	46	40	15	11	150
		% within types of retail outlet	25.3%	30.7%	26.7%	10.0%	7.3%	100.0%

FINDINGS: From the above table it can be seen that all the 44 International Food Service Retailers (respondents) either strongly agreed (56.8%) or agreed (43.2%) that entry of international retailers impacted Indian retail market with increased customer expectation. And out of 106 Indian fast food retailers (respondents), majority either strongly agreed or agreed that entry of international retailers impacted Indian retail market with increased customer awareness. But, 17.3% Indian fast food retailers (respondents) either disagreed or strongly disagreed on the same.

4.3.3. Analysis: Analysis of the association between **Increased customer expectations** and **type of retail outlets.**

H_0: The two factors are independent.

H_1: The two factors are not independent (associated).

Table-13: Chi-Square Test

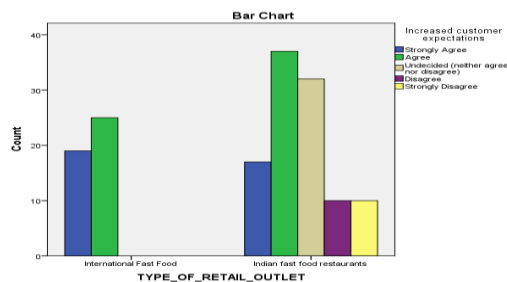| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	34.743[a]	4	.000
Likelihood Ratio	48.124	4	.000
Linear-by-Linear Association	27.513	1	.000
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 2.93.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-3** at 5% level of

significance. Hence it can be concluded that **two variables are associated**.

Table-14: Crosstab: Increased customer expectations

Crosstab								
			Increased customer expectations					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	19	25	0	0	0	44
		% Within types of retail outlet	43.2%	56.8%	0.0%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	17	37	32	10	10	106
		% Within types of retail outlet	16.0%	34.9%	30.2%	9.4%	9.4%	100.0%
Total		Count	36	62	32	10	10	150
		% Within types of retail outlet	24.0%	41.3%	21.3%	6.7%	6.7%	100.0%

FINDINGS: From the above table it can be seen that all the 44 International Food Service Retailers (respondents) either strongly agreed or agreed that entry of international retailers impacted Indian retail market with increased customer expectation. And out of 106 Indian fast food retailers (respondents), majority either strongly agreed or agreed that entry of international retailers impacted Indian retail market with increased customer expectation. But, 18.8% Indian fast food retailers (respondents) either disagreed or strongly disagreed on the same.

4.3.4. Analysis: Analysis of the association between **lessening of the sales** and **type of retail outlets.**

H_0: The two factors are independent.

H_1: The two factors are not independent (associated).

Table-15: Chi-Square Test

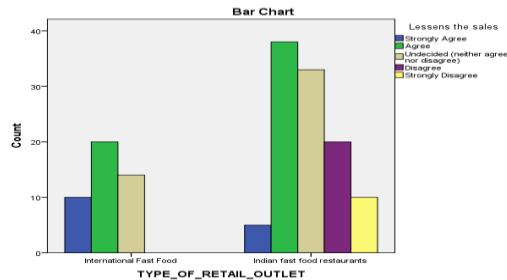| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	23.285[a]	4	.000
Likelihood Ratio	30.461	4	.000
Linear-by-Linear Association	19.795	1	.000
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 2.93.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-4** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-16: Crosstab: Lessens the sales

Crosstab								
			Lessens the sales					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	10	20	14	0	0	44
		% Within types of retail outlet	22.7%	45.5%	31.8%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	5	38	33	20	10	106
		% Within types of retail outlet	4.7%	35.8%	31.1%	18.9%	9.4%	100.0%
Total		Count	15	58	47	20	10	150
		% Within types of retail outlet	10.0%	38.7%	31.3%	13.3%	6.7%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, majority of the

respondents either strongly agreed or agreed that entry of international retailers impacted Indian retail market with decreasing the sales of Indian fast food retailers. And out of 106 Indian fast food retailers (respondents), majority either strongly agreed or agreed that entry of international retailers impacted Indian retail market with decreasing the sales of Indian fast food retailers. But, 20.0% Indian fast food retailers (respondents) either disagreed or strongly disagreed on the same.

4.3.5. Analysis: Analysis of the association between "Indian food market has keep competent employees" and type of retail outlets.

H₀: The two factors are independent.

H₁: The two factors are not independent (associated).

Table-17: Chi-Square Test

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	22.851ᵃ	4	.000
Likelihood Ratio	32.266	4	.000
Linear-by-Linear Association	11.108	1	.001
N of Valid Cases	150		
a. 3 cells (30.0%) have expected count less than 5. The minimum expected count is 2.93.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-5** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-18: Crosstab: Indian food market has to keep competent employees.

Crosstab								
			Indian food market has keep competent employees					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	20	24	0	0	0	44
		% Within types of retail outlet	45.5%	54.5%	0.0%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	43	27	10	11	15	106
		% Within types of retail outlet	40.6%	25.5%	9.4%	10.4%	14.2%	100.0%
Total		Count	63	51	10	11	15	150
		% Within types of retail outlet	42.0%	34.0%	6.7%	7.3%	10.0%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 45.5% respondents strongly agreed, 54.5% respondents agreed, 0.0% respondents had neutral response, 0.0% respondents disagreed and 0.0% respondents strongly disagreed that Indian food service retailers have to keep competent employees due to the competition faced by the traditional market from the international outlets.

And out of 106 Indian fast food retailers (respondents), 40.6% respondents strongly agreed, 25.5% respondents agreed, 9.4% respondents had neutral response, 10.4% respondents disagreed and 14.2% respondents strongly disagreed that Indian food market has to keep competent employees due to the competition faced by the traditional market from the international outlets.

4.3.6. Analysis: Analysis of the association between **chefs' switch over** and **type of retail outlets.**

H$_0$: The two factors are independent.

H$_1$: The two factors are not independent (associated).

Table-19: Chi-Square Test

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	29.827[a]	4	.000
Likelihood Ratio	34.894	4	.000
Linear-by-Linear Association	16.675	1	.000
N of Valid Cases	150		
a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 6.75.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-6** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-20: Crosstab: Chefs' switch over

Crosstab								
			Chefs switch over					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	15	9	15	5	0	44
		% Within types of retail outlet	34.1%	20.5%	34.1%	11.4%	0.0%	100.0%
	Indian Food Service Retailers	Count	10	31	16	26	23	106
		% Within types of retail outlet	9.4%	29.2%	15.1%	24.5%	21.7%	100.0%
Total		Count	25	40	31	31	23	150
		% Within types of retail outlet	16.7%	26.7%	20.7%	20.7%	15.3%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 34.1% respondents

strongly agreed, 20.5% respondents agreed, 34.1% respondents had neutral response, 11.4% respondents disagreed and 0.0% respondents strongly disagreed that entry of international retailers impacted Indian retail market with Chefs' switch over for Indian fast food retailers.

And out of 106 Indian fast food retailers (respondents), 9.4% respondents strongly agreed, 29.2% respondents agreed, 15.1% respondents had neutral response, 24.5% respondents disagreed and 21.7% respondents strongly disagreed that entry of international retailers impacted Indian retail market with Chefs' switch over for Indian fast food retailers.
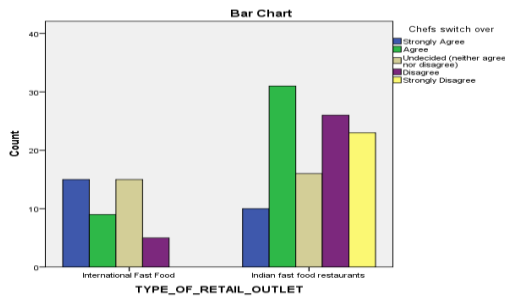
4.3.7. Analysis: Analysis of the association between **Improve the Process** and **type of retail outlets.**

H$_0$: The two factors are independent.

H$_1$: The two factors are not independent (associated).

Table-21: Chi-Square Test

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	44.397[a]	4	.000
Likelihood Ratio	52.610	4	.000
Linear-by-Linear Association	37.912	1	.000
N of Valid Cases	150		
a. 1 cells (10.0%) have expected count less than 5. The minimum expected count is 4.40.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-22: Crosstab: Indian food market has to improve the quality of process.

Crosstab								
			Indian food market has to improve the quality of Process.					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	20	19	5	0	0	44
		% Within types of retail outlet	45.5%	43.2%	11.4%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	7	38	21	25	15	106
		% Within types of retail outlet	6.6%	35.8%	19.8%	23.6%	14.2%	100.0%
Total		Count	27	57	26	25	15	150
		% Within types of retail outlet	18.0%	38.0%	17.3%	16.7%	10.0%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 45.5% respondents strongly agreed, 43.2% respondents agreed, 11.4% respondents had neutral response, 0.0% respondents disagreed and 0.0% respondents strongly disagreed that Indian food market has to improve the Quality due to the competition faced by the traditional market from the international outlets.

And out of 106 Indian fast food retailers (respondents), 6.6% respondents strongly agreed, 35.8% respondents agreed, 19.8% respondents had neutral response, 23.6% respondents disagreed and 14.2% respondents strongly disagreed that Indian food market has to improve the quality of Process due to the competition faced by the traditional market from the international outlets.

4.3.8. Analysis: Analysis of the association between **"Indian food market has improve Customer Service"** and **type of retail outlets.**

H_0: The two factors are independent.

H_1: The two factors are not independent (associated).

Table-23: Chi-Square Test

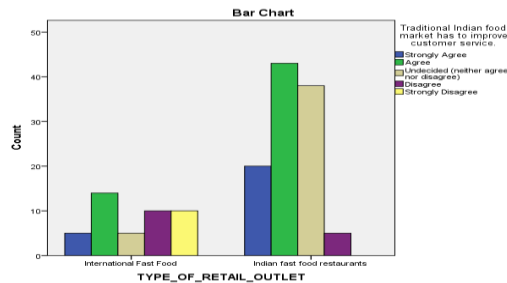| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	42.356[a]	4	.000
Likelihood Ratio	42.954	4	.000
Linear-by-Linear Association	19.863	1	.000
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 2.93.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-8** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-24: Crosstab: Indian food market has to improve customer service.

Crosstab			Indian food market has to improve customer service.					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	5	14	5	10	10	44
		% Within types of retail outlet	11.4%	31.8%	11.4%	22.7%	22.7%	100.0%
	Indian Food Service Retailers	Count	20	43	38	5	0	106
		% Within types of retail outlet	18.9%	40.6%	35.8%	4.7%	0.0%	100.0%
Total		Count	25	57	43	15	10	150
		% Within types of retail outlet	16.7%	38.0%	28.7%	10.0%	6.7%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 11.4% respondents strongly agreed, 31.8% respondents agreed, 11.4% respondents had neutral response, 22.7% respondents disagreed and 22.7% respondents strongly disagreed that Indian food market has to improve customer service due to the competition faced by the traditional market from the international outlets.

And out of 106 Indian fast food retailers (respondents), 18.9% respondents strongly agreed, 40.6% respondents agreed, 35.8% respondents had neutral response, 4.7% respondents disagreed and 0.0% respondents strongly disagreed that Indian food market has to improve customer service due to the competition faced by the traditional market from the international outlets.

4.3.9. Analysis: Analysis of the association between **"Indian food market has to improve ambience / interiors"** and **type of retail outlets.**

H$_0$: The two factors are independent.

H$_1$: The two factors are not independent (associated).

Table-25: Chi-Square Test

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	27.959[a]	4	.000
Likelihood Ratio	36.344	4	.000
Linear-by-Linear Association	25.704	1	.000
N of Valid Cases	150		
a. 1 cells (10.0%) have expected count less than 5. The minimum expected count is 3.52.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-9** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-26: Crosstab: Indian food market has to improve ambience / interiors.

Crosstab								
			Indian food market has to improve ambience / interiors.					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	20	15	9	0	0	44
		% Within types of retail outlet	45.5%	34.1%	20.5%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	15	31	25	23	12	106
		% Within types of retail outlet	14.2%	29.2%	23.6%	21.7%	11.3%	100.0%
Total		Count	35	46	34	23	12	150
		% Within types of retail outlet	23.3%	30.7%	22.7%	15.3%	8.0%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 45.5% respondents strongly agreed, 34.1% respondents agreed, 20.5% respondents had neutral response, 0.0% respondents disagreed and 0.0% respondents strongly disagreed that Indian food market has to improve ambience / interiors due to the competition faced by the traditional market from the international outlets.

And out of 106 Indian fast food retailers (respondents), 14.2% respondents strongly agreed, 29.2% respondents agreed,

23.6% respondents had neutral response, 21.7% respondents disagreed and 11.3% respondents strongly disagreed that Indian food market has to improve ambience / interiors due to the competition faced by the traditional market from the international outlets.
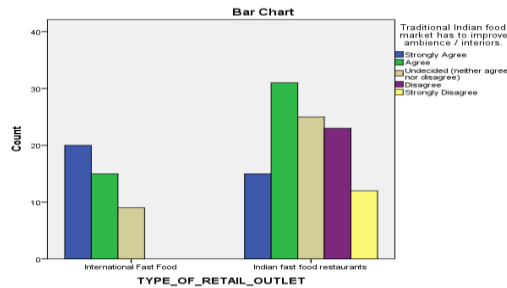
4.3.10. Analysis: Analysis of the association between Maintain Quality **and type of retail outlets.**

H₀: The two factors are independent.

H₁: The two factors are not independent (associated).

Table-27: Chi-Square Test

| Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	50.086ᵃ	4	.000
Likelihood Ratio	65.865	4	.000
Linear-by-Linear Association	.953	1	.329
N of Valid Cases	150		
a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is 2.93.			

Interpretation: From the table we find out that asymptotic significance for Pearson Chi Square comes out to be 0.000 (less than 0.05) so we **reject null hypothesis-10** at 5% level of significance. Hence it can be concluded that **two variables are associated**.

Table-28: Crosstab: Has to maintain quality

Crosstab								
			Has to maintain quality					Total
			Strongly Agree	Agree	Undecided (neither agree nor disagree)	Disagree	Strongly Disagree	
TYPES OF RETAIL OUTLET	International Food Service Retailers	Count	0	20	24	0	0	44
		% Within types of retail outlet	0.0%	45.5%	54.5%	0.0%	0.0%	100.0%
	Indian Food Service Retailers	Count	40	25	16	15	10	106
		% Within types of retail outlet	37.7%	23.6%	15.1%	14.2%	9.4%	100.0%
Total		Count	40	45	40	15	10	150
		% Within types of retail outlet	26.7%	30.0%	26.7%	10.0%	6.7%	100.0%

FINDINGS: From the above table it can be seen that out of 44 International Food Service Retailers, 0.0% respondents strongly agreed, 45.5% respondents agreed, 54.5% respondents had neutral response, 0.0% respondents disagreed and 0.0% respondents strongly disagreed that entry of international retailers impacted Indian retail market with 'has to maintain quality'.

And out of 106 Indian fast food retailers (respondents), 37.7% respondents strongly agreed, 23.6% respondents agreed, 15.1% respondents had neutral response, 14.2% respondents disagreed and 9.4% respondents strongly disagreed that entry of international retailers impacted Indian retail market with 'has to maintain quality'.
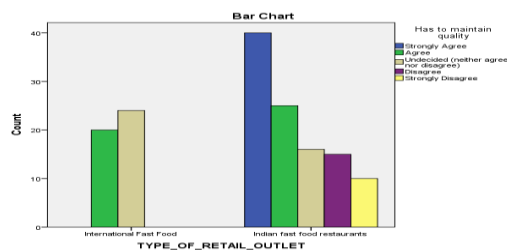
From the results of above analysis, it can be said that there is impact of the entry of International Food Service Retailers on the Indian fast food retailers. Hence, it can be said that our Research Objective-2 is fulfilled.

V. DISCUSSION, CONCLUSION & MANAGERIAL IMPLICATIONS

This research study has identified the factors of quality attributes of Indian food service retail outlets that were impacted by the competition from international food service retail outlets. One of the major findings to emerge from this research study is that retailers' perception about the impact of competition in KAVAL region of U.P., regarding the quality attributes were related to core product and services, delivery process, physical evidence and competence of the employees.

Findings of the present research confirm the results of the previous research work conducted by Malik, N., Rizvi. I, Sharma, S.D., (2017), and is an extension of the same, where they found that evidence from this research study suggests that 'mostly the young Indian consumer has zeal for visiting fast food outlets for experience, fun and change. They consider eating food at international food outlet as a status symbol. Consumers prefer eating at International food service retail outlets for its good ambiance/interiors, systematic buying process, better sales promotion schemes and the staff is responsive, reliable and polite. Consumers feel that they had better experience at international food outlets and they get better physical environment along with hygienic, tasty and healthy food. Accuracy of serving order, attractive packaging, Speed of Serving, additional Services are also the motivation for the consumers to prefer international food service retail outlets and the same is known for better customer service and better complain management. It was interesting to compare

experiences and preferences of consumers on the basis of international food service outlets and Indian food service outlets. It is recommended that further research be undertaken in the areas of service delivery process and hygiene in the international food service outlets and Indian food service outlets.

It can be concluded that there is impact of the competition from international food service retail outlets on the quality attributes of Indian food service retail outlets. Indian food service retail outlets are compelled to improve quality as per the increasing customer expectations and they are focusing on the following attributes of quality in order to remain competitive-

- Indian food market has to keep competent employees.
- Improve Process.
- Indian food market has to improve ambience / interiors.
- Indian food market has to improve customer service.
- Maintain quality

Competition from international food service retail outlets is leading to complex marketing environment, which is witnessing-

- Increased customer expectations
- Increased customer awareness
- Increased level of customer satisfaction

Extensive competition is causing the negative impact on sales and profits of the Indian food service retail outlets, which are also facing a problem of chefs' switch over.

As far as the results of the chi square and cross tabulation are concerned, it can be seen that all the 10 null hypotheses were rejected, which confirmed that there is an association between the quality attributes and the type of retail outlets (Indian / international food service retail outlets). The perception of

international food service retailers is that competition is leading to increased customer expectations, increased customer awareness and increased level of customer satisfaction. On the contrary, the perception of Indian food service retailers is differing; and there is a good percentage of retailers who are denying that competition from international food service retail outlets has any kind of negative effect on them. Though they agree that Indian food service retail outlets have to keep competent employees, maintain and improve quality but are not fully convinced that consumer expectation and satisfaction levels are increasing.

If this attitude of Indian food service retailers is unrealistic, then certainly they are going to pay heavy price for their unrealistic approach towards marketing research. Such a condition may keep Indian food service retailers at ease, and meanwhile international food service retailers will snatch their market share; which is also predicted by many research reports. Mc Donald's, KFC, Domino's Pizza, and Pizza Hut etc. are continuously striving to increase their market share. These international players are competent enough to invest millions of dollars to do market research and penetrate into Indian food service retail sector. As this is also evident from the other sectors, that in any industry where FDI is allowed, international players and MNCs are dominating the local market within a very short span of time.

So, it would be better for Indian food service retailers to be proactive and conduct proper market research and research on changing consumer preferences, need and wants; and also improve their quality as per the need of the present hour.
In the conclusion and discussion part, it would be logical and relevant to discuss the findings of previous research study of Pawar, P., & Veer, N. (2014), in which they described two types of FDI.

- Outbound FDI
- Inbound FDI

These are two types of investment made by Indian and international food service retailers. Here, Outbound FDI means the external investments being made by Indian food service retailers, while inbound FDI explicates the interest of international food service retailers in the Indian food retail market. Indian and international food service retailers represent a share in these inbound as well as outbound FDI. The impact of internationalisation must be studied on the competitive advantage. Initially, India's trade in the outbound FDI was not significant; but, now Indian organized food service retailers are also investing huge amount of money in food retail market. Pawar, P., & Veer, N. (2013), observed significant factor of competitiveness of retail industry with respect to investment decision. They concluded that determinants of competitiveness, showed favourable indicators for retail industry in India. They supported that Indian retail industry can get advantage of following factors-

- Economy of scale,
- High market demand,
- Largest market size,
- Global sourcing for retail sector and,
- Low penetration of retail.

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DECLARATION

I/We hereby declare that the research paper submitted by us is based on actual and original work carried out by us. Any reference to work done by any other person or institution or any material obtained from other sources have been duly cited and referenced. We further certify that the research paper has not been published or submitted for publication anywhere else nor it will be sent for publication in the future.

CONFLICT OF INTEREST

We have no conflict of interest with one another working in this area regarding the manuscript.