# Coffee Chains Brewing Up the Taste Quotient of Indian Consumers : An Empirical Study in Delhi NCR


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## Abstract

**Indians largely have been accustomed to drinking tea, and coffee has been considered as a drink for the high - end population. However, this notion is changing, and the coffee culture in India is flourishing with the entrance of local and international brands of coffee chains. In addition to serving hot and cold varieties of coffee and snacks, coffee shops provide a leisurely experience and space to bring people closer to each other. With increasing number of players entering in the café market, the competition is mounting, and creating a space in the minds of the customers will be an uphill task for these outlets. This research highlighted the perceptual mapping of four coffee chains, that is, Café Coffee Day, Costa Coffee, Barista, and Starbucks. With a sample of 120 respondents, this paper attempted to explore various factors that may influence the selection of a particular coffee shop, and in addition, the paper also examined the respondents' purpose of visiting the coffee shops. Discriminant analysis was applied to construct the perception map of the customers. The results revealed that product quality and ambience were the most important attributes affecting customers' decision making in selection of coffee outlets.**



***Keywords :*** **coffee chains, perceptual mapping, discriminant analysis, perception map**

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Coffee shops are establishments which primarily serve prepared coffee and other hot beverages. Coffee shops focus on providing coffee and tea as well as light snacks. People can read newspapers and magazines, or can chat with their friends or relatives. Coffee shops have consuming characteristics of popular taste, fast service, simple preparation, and reasonable economical pricing, and coffee shops are listed under the restaurant category within commercial type dining (Hung, 2012).

In India, the coffee retailing sector is booming today, with several local and multinational chains active in the market. The sector consists of hotel café's, individual café's, and retail café chains. Till the late 90's, coffee drinking in India was restricted to the intellectuals, the South Indians, and the five star coffee shop visitors. With increasing disposable incomes, and high influence of western cultures, coffee has become a lifestyle. It has caught the imagination of today's generation, stimulating the demand for coffee shops in every part of the country. Coffee has turned out to be a trendy beverage for the young people throughout the country, and with the high ratio of young population in India, the entire coffee market has been benefited. The coffee shops are turning out to be the best places to hangout for youngsters, and thus, are preferred over other venues.

Café Coffee Day (CCD) pioneered the concept of the café in India in 1996 and has become a large organized retail café chain with over 1500+ cafes spread across 200 cities/towns across India. It is a branch of the largest coffee conglomerate in India, Amalgamated Bean Coffee Trading Company (ABCTC) (Café Coffee Day, n.d.). Following the success of CCD, Barista opened its first coffee lounge in India in year 2000. In 2007, Barista was


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acquired by Lavazza, and was renamed as 'Barista Lavazza'. At present, Barista Lavazza has more than 225 outlets in India, and has also become the fastest Indian brand to reach the top of the phenomenal companies that changed India (Siliconindia, 2013). Costa Coffee, the largest British chain, and the second largest coffeehouse in the world, made its way into India in September 2005. The company has already set up 100 coffee shops in various parts of the country through its master franchisee, Devyani International. Costa's largest global rival, Starbucks entered India in October 2012 in joint venture of 50 :50 with Tata Global Beverages, called Tata Starbucks Ltd. As of March 2014, Starbucks was operating 45 outlets in five cities of India ("Costa Coffee to open 200 more stores in India by 2015," 2013).

According to a report published in 2012, 'India Coffee Shops / Café Market Forecast & Opportunities, 2017' (as cited in Ganguly, 2012), the coffee shops / café market in India is expected to grow threefold in 5 years to become a whooping INR 5600 crores (US$ 1 billion) market by 2017 (Ganguly, 2012). A large number of coffee shops in India are being developed with the proposition of food & beverages. The popularity of these cafes is continuously increasing, with added food menus on cards along with beverages. Coffee chains are trying different things with offerings of beverages and refreshment and are acquiring customization in territorial taste palates- offering idli in the South, vada pao in West India, samosa in North, and so on. Given that there are numerous national and global brands attempting to extend their base in this attractive business, consumers are likely to have much more choices in the impending years.

In this perspective, knowing customers' preferences and brand perceptions had become crucial for various coffee chains. The present study attempts to find out the perceptions of consumers towards the selected coffee chains with the objectives mentioned in the next section.

## Research Objectives

- To construct a perceptual map of consumers' perception towards the following coffee chains - Café Coffee Day, Costa Coffee, Barista, and Starbucks.
- To analyze the factors affecting consumers' decision making while selecting a particular coffee shop.
- To find out the customers' reasons for visiting different coffee shops.

## Review of Literature

The service industry, including coffee outlets, has been forced to find new ways of creating a competitive advantage. There is a continuous increase in customers' expectations and subsequent demands for the improved quality of service (Parasuraman, Zeithaml, & Berry, 1988; Rao & Kelkar, 1997). A number of studies have concluded that the quality of food and drinks, service, and atmosphere are the principal choices in the restaurant industry (Auty, 1992 ; Gregoire, Shanklin, Greathouse, & Tripp, 1995). Few studies have indicated that food, physical environment, and employee services should be functional as vital components of restaurant experience in forming the perceptions of the restaurant service quality in the restaurant industry (Chow, Lau, Lo, Sha, & Yun, 2007 ; Ryu & Han, 2010).

Waxman (2006) concluded that the top five characteristics of the ideal coffee shop included cleanliness, appealing aroma, adequate lighting, comfortable furniture, and a view to the outside. Wang (2000) introduced 11 dimensions and 34 elements to analyze coffee chain store dimensions and elements: product, service, physical facility, service staff, convenience, promotion, organization factor, shop's atmosphere, customer characteristics, safety, and others (combination with book store). Chen and Hu (2010) identified five attributes to determine service quality of coffee outlets, namely, coffee quality, service, food and beverage, atmosphere, and extra benefits. Hung (2012) concluded that eight attributes : staff friendliness, quality of coffee beverages, restroom availability, staff service speed, cleanliness and brightness of the store interior, convenience of product purchase, personal preference, and parking convenience were the most emphasized by coffee shop patrons. On the other hand, Sutawidjaya, Tuti, and Suharyanti (2012) concluded that attitude and behaviour, accessibility and flexibility, reliability and trustworthiness, and recovery influenced the customers' satisfaction with coffee shops. While examining the consumption experience in coffee shops, Yu and Fang (2009) found that product quality, service quality, and contextual (memorable) experience are all important in determining customers' perceived value.

In their study, Nadiri and Gunay (2013) concluded that experiential marketing has positive effects on customer satisfaction, which in turn can affect the customers' behaviour to revisit coffee shops. According to Schmitt and Simonson (1997), the Starbucks style involves a variety of elements to create alluring visual stimuli (aesthetics), and also creates brand awareness (reputation), causing emotional associations with pleasure, thereby facilitating socialization.

There appears to be a certain range of atmospheric elements that can result in high levels of positive emotions and store image perceptions. Perceptions of interior elements, for example, lighting, music, colours, and cleanliness in a coffee shop significantly influence store image, purchase likelihood, pleasure, and word of mouth (Ly, 2011). Tseng and Min (2012) concluded in their research that customers did not happen to go to the same branches of stores every time they visited coffee shops, and their main motive to go to the coffee shops was to meet friends. Also, among various factors, the atmosphere of a coffee shop was the most liked by the respondents.

Customer loyalty towards a particular coffee shop is affected because of comfortable environment, coffee taste, good service, price, convenient location, that is, short distances to cover (Xu, Wang, and He, 2013). Abel (2009) studied the determinants of customer loyalty in the speciality coffee industry and concluded that convenience and ambience were important factors in a customers' decision of where to go to drink coffee. Coffee shops should have some loyalty programs to build a relationship with their customers in order to achieve their customer loyalty. Loyalty programs are not only building relationships with customers, but also increase consumption of other things with the same coffee shops (Uncles, Dowling, & Hammond, 2003).

Coffee consumption in a coffee outlet is not just a matter of getting functional value, but symbolic value too. Although the traditional customer value judgement on service quality attributes based on functional value are important, customers also perceived symbolic value reflecting social, emotional, aesthetic, and reputational aspects of service quality attributes during coffee consumption (Chen & Hu, 2010). Most people visit coffee shops with friends, and motivations to visit branded coffee shops are most influenced by three factors: past experience/ familiarity, convenience of location/ travel, and friends & family (Burge, 2013).

➭ **Brand Perception :** A brand is defined as "a name, term, sign, symbol or design, or combination of them, which is intended to identify the goods of one seller or group of sellers and to differentiate them from those of competitors" (Kotler, 1988, p. 463).

Rooney (1995) suggested that a brand name is a key asset in enhancing company success, creating consumer confidence, and active consumer behaviour as consumers distinguished the brand as more desirable than its competitors. Kotler (2005) observed that the brand becomes "the whole platform for planning, designing, and delivering superior value to the company's target customers" (p. 9). Kapferer (2004) said that "a brand is a shared desirable and exclusive idea embodied in products, services, places, and/or experiences" (p. 13) .

Branding is all about perception; it is a battle of perceptions and not products. Understanding how consumers' perceptions are formed relies on cognitive methods aimed to capture brand associations that are stored in consumers' memory (Keller, 1993). Consumers generally associate a brand name with a specific attribute, some benefits, particular usage conditions, a logo, features, and / or characteristics (John, Loken, Kim, & Monga, 2005).

Perceptual mapping is a generic method that applies to the positioning of perceptual points in a multidimensional space. In a perceptual map, products (or brands) are represented graphically in a space spanned by attributes and for this purpose, consumers are often asked to specify their preference. Marketing managers frequently make decisions about product design and brand re-positioning, for which they might rely on a framework in which consumers offer their evaluations and choices of a limited set of perceptual attributes (Kaul & Rao, 1995; van Kleef, van Trijp, & Luning , 2004).

## Research Methodology

➯ **Sample Design :** A total of 120 respondents filled the questionnaire rating all the four coffee chains on six dimensions. Data were collected over a period of 3 months, that is, from January - March 2014 from Delhi NCR keeping in view that all selected coffee chains have their presence in this region. The survey was done using both the online and offline format. We personally visited the coffee shops and approached customers for the survey and also uploaded the questionnaire online for gathering the responses.

➯ **Data Collection Method :** In this research, the focus is on the consumers who had visiting experiences in coffee shops selected for the study. In order to map the perceptions of consumers towards the selected coffee chains, that is, Café Coffee Day, Costa Coffee, Starbucks, and Barista, data were collected using a structured questionnaire. Based on the literature review (Abel, 2009; Chen & Hu, 2010 ; Ly, 2011; Xu et al., 2013), six dimensions were identified - namely : Product quality, ambience, service quality, value for money, convenience, and promotion - to analyze the perceptions of the customers.

➯ **Statistical Analysis :** Discriminant analysis was run on SPSS to classify brands in separate categories to which they belonged on the basis of a set of independent attributes. With the help of Microsoft Excel, a perceptual map was drawn out by obtaining output from SPSS.

## Analysis and Results

➯ **Demographic Profile of the Respondents :** As shown in the Table 1, among 120 respondents, gender of the respondents was equally distributed, representing 50% of male and 50% of female respondents. The dominant age group of the respondents was 20-25 years (57.5%), followed by 26-30 years (25.8%), 31-35 years (11.7%), and 36 years and above (5%) respectively. Out of the total respondents, 45.8% were employed, 44.2% were college going students, and 10% were involved in business.

➯ **Usage Pattern of the Respondents :** Around 33% of the respondents visited the coffee shops more than once a week, 28.3% of the respondents visited the coffee shops at least once a month, 21.7% of the respondents visited the

**Table 1. Respondents' Demographic Profile**

| Category | Responses | % |
|---|---|---|
| **Age** | | |
| 20-25 Years | 69 | 57.5% |
| 26-30 Years | 31 | 25.8% |
| 31-35 Years | 14 | 11.7% |
| 36 Years and above | 6 | 5.0% |
| **Gender** | | |
| Male | 60 | 50% |
| Female | 60 | 50% |
| **Work Profile** | | |
| College Student | 53 | 44.2% |
| Service | 55 | 45.8% |
| Self Employed | 12 | 10% |
| Others | 0 | 0 |

**Table 2. Frequency of Visiting Coffee Shops**

| | Responses | % |
|---|---|---|
| Once a Week | 26 | 21.7% |
| More than once a week | 39 | 32.5% |
| Once a Month | 34 | 28.3% |
| More than once a Month | 21 | 17.5% |
| **Total** | **120** | **100%** |

**Table 3. Time Spent at the Coffee Shop**

| | Responses | % |
|---|---|---|
| Less than 1 Hour | 41 | 34.2% |
| 1-2 Hours | 58 | 48.3% |
| Over 2 Hours | 21 | 17.5% |
| **Total** | **120** | **100%** |

**Table 4. Purpose of Visiting a Coffee Shop**

| | Responses | % |
|---|---|---|
| Business meetings | 10 | 8.3% |
| Meeting friends | 88 | 73.4% |
| Relaxation | 15 | 12.5% |
| On some occasion (Birthdays, Anniversary, etc.) | 0 | 0 |
| Just for coffee | 7 | 5.8% |
| Any other | 0 | 0 |
| **Total** | **120** | **100%** |

**Table 5. Factors Influencing Selection of a Coffee Shop**

| Attributes | Ranking | | | | | |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| Product Quality | 48 | 55 | 17 | 0 | 0 | 0 |
| Ambience | 43 | 31 | 17 | 21 | 8 | 0 |
| Service Quality | 8 | 17 | 34 | 45 | 16 | 0 |
| Value for Money | 0 | 0 | 9 | 17 | 38 | 56 |
| Convenience | 21 | 17 | 36 | 24 | 22 | 0 |
| Promotion | 0 | 0 | 7 | 13 | 36 | 64 |
| **Total** | **120** | **120** | **120** | **120** | **120** | **120** |

**Table 6. Tests of Equality of Group Means**

| Attributes | Wilks' Lambda | *F* | *df1* | *df2* | Sig. |
|---|---|---|---|---|---|
| Product Quality | 0.652 | 14.241 | 3 | 476 | 0 |
| Ambience | 0.664 | 13.484 | 3 | 476 | 0 |
| Service Quality | 0.897 | 3.076 | 3 | 476 | 0.032 |
| Value for Money | 0.97 | 0.834 | 3 | 476 | 0.479 |
| Convenience | 0.313 | 58.642 | 3 | 476 | 0 |
| Promotion | 0.791 | 7.042 | 3 | 476 | 0 |

**Table 7. Eigenvalues**

| Function | Eigenvalue | % of Variance | Cumulative % | Canonical Correlation |
|---|---|---|---|---|
| 1 | 3.011[a] | 88.1 | 88.1 | 0.866 |
| 2 | .385[a] | 11.3 | 99.4 | 0.527 |
| 3 | .021[a] | 0.6 | 100 | 0.145 |

Note : "a" : first 3 canonical discriminant functions were used in the analysis

**Table 8. Standardized Canonical Discriminant Function Coefficients (Attributes)**

| Attributes | Function | | |
|---|---|---|---|
| | 1 | 2 | 3 |
| Product Quality | 0.287 | 0.649 | 0.355 |
| Ambience | -0.235 | 0.512 | 0.12 |
| Service Quality | -0.414 | -0.037 | 0.251 |
| Value for Money | 0.19 | -0.028 | 0.918 |
| Convenience | 0.932 | 0.03 | -0.251 |
| Promotion | 0.151 | 0.466 | -1.015 |

**Table 9. Standardized Canonical Discriminant Function Coefficients (Coffee Chains)**

| Brands | Function | | |
|---|---|---|---|
| | 1 | 2 | 3 |
| Café Coffee Day | 2.718 | 0.335 | -0.049 |
| Costa Coffee | -0.419 | -0.939 | -0.105 |
| Barista | -0.354 | -0.08 | 0.245 |
| Starbucks | -1.945 | 0.684 | -0.091 |

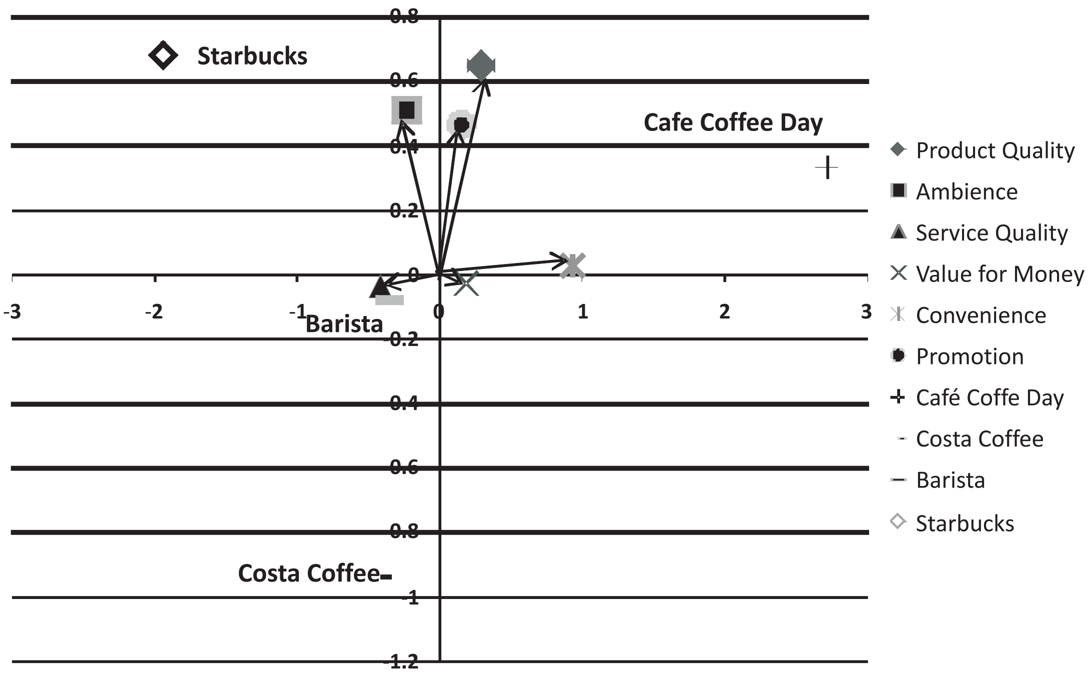
coffee shops once a week, and around 17% of the respondents visited the coffee shops once a month (Table 2). When it came to spending time at the coffee shops, 48.3% of the respondents spent, on an average, 1-2 hours during each visit (Table 3).

➢ **Behavioural Characteristics of the Respondents :** The respondents were asked to respond to the question regarding the main purpose of them visiting the coffee shops, and the results indicate that a majority of respondents (72.9%) visited the coffee shops to meet friends, followed by 12.8% of the respondents, who visited for relaxation, 8.6% held business meetings at the coffee shops, and 5.7% of the respondents just went to have a cup of coffee (Table 4).

The respondents also ranked the level of importance attached to the six attributes while choosing a particular coffee shop. The results in the Table 5 indicate that product quality and ambience were the most important criteria for the respondents while selecting a coffee shop. Convenience (location and availability of outlets) and service quality also had higher levels of consideration. However, value for money and promotion had the least amount of influence over customers' decision making.

Values of Wilks' Lambda in Table 6 indicate higher group differences. The Table reveals that all four selected coffee chains varied significantly across various attributes. However, the importance of the attribute 'value for money' in distinguishing between the brands is found to be low, that is, all attributes except VFM seem to be significantly discriminating among the brands. A larger Eigen value is associated with a strong function. The percentage of variance allows the evaluation of that canonical variable which accounts for most of the spread. The Eigen values in the Table 7 show that the first two functions explain 99.4% of the variance in the data. Therefore, for further interpretation, these two functions (Function 1 and Function 2) were utilized.

**Figure 1. Perceptual Map**




The standardized coefficients help to examine the relative standing of the measurements. The higher value of coefficients for a particular attribute on a function indicates the higher loading of the same on that function. The Table 9 shows the average discriminant score for the brands in the two groups. Six attributes were plotted on a perceptual map (Figure 1) using the standardized canonical discriminant coefficients on Function 1 and Function 2 as given in the Table 8. The four coffee chains have their unique positions on the map, which have been plotted on the basis of value of group centroid on Function 1 and 2 (Table 9).

Distance of the attribute vectors from the axis and their length shows that convenience, value for money, and service quality weight heavily on Dimension 1. However, service quality is in the opposite direction, and it can also be considered as a separate dimension. The importance of value for money in distinguishing brands is found to be low, as is evident from the length of the vector. On the other hand, the perceptual map shows that Dimension 2 is comprised of product quality, promotion, and ambience. Although, ambience is in the different direction, but its importance in distinguishing coffee chains is high, as is evident from the standardized coefficients on Function 2. The length of the vector and standardized coefficients on Function 2 indicate that product quality is the most important factor which discriminates the four selected coffee chains.

The positions of the coffee chains on the perceptual map reveals that customers' associated Starbucks with product quality, ambience, and promotion. The values of group centroid also indicate that Starbucks weighs heavily on Dimension 2. Café Coffee Day counts more on Dimension 1, specifically on the convenience attribute. Service quality is in the opposite direction, so its association with CCD is not much. CCD has also been perceived as positively associated with product quality and promotion benefits. Barista is identified with good service quality; whereas in case of Costa Coffee, association with all the attributes is found to be low.

## Conclusion

A brand in essence is the combination of all experiences related to the product, services, and delivery of those products and services. With the number of players entering into the café market in India, brand managers need to understand how customers' perceive their brand and what is important to the customers while making a decision. In this context, the present research paper attempted to map customers' perceptions towards four coffee chains and analyzed the usage and behavioural patterns of customers regarding coffee drinking.

The study indicates that coffee shops have become a place for meeting friends and for leisure (as per Table 4). Besides the office and home, the coffee shops happen to provide people a social location to bring people's relationships closer. Product quality and ambience are the most important attributes for selecting a coffee shop (Table 5). The quality of beverages and snacks will bring customers to a particular coffee shop, but it is the ambience that will make them stay and relax. Coffee chains should differentiate their brand from competitors based on product quality and the services they offer to the customers. Convenience has also emerged as one of the main factors in selection of the coffee shops. Consistent growth of the consuming class and the increasing time-pressured consumer is giving way to convenience based options, primarily driving the growth of cafes. This is the reason players like CCD and Barista are getting into new areas like highways and captive locations such as offices, colleges, and hospitals.

The café market in India is growing rapidly and is already home to coffee chains such as Costa Coffee, Barista, Café Coffee Day, Starbucks, Java Green, Gloria Jean's Coffee, Coffee Bean, Tea Leaf, and so forth, and more are to come. In order to win customers in this highly competitive market, coffee chains should focus on customers' wants, desires, and aspirations, and develop strategies to differentiate themselves from competitors by providing unique quality of services and brand experience.

## Managerial Implications

The findings of this study reveal that product quality is the biggest factor in attracting customers to a particular coffee outlet. The findings are consistent with the previous studies conducted by Gregoire et al. 1995; Auty, 1992; Chen & Hu, 2009; Yu & Fang, 2009, which concluded that product quality is one of the important dimensions to determine customers' perceived value. In order to meet the needs of the customers, coffee outlets should provide them with exceptional blend of high-quality taste and alluring menu. Focus should be on continuous innovation so as to attract new customers and retain the existing ones.

The other most important factor which differentiates the coffee outlets is ambience. The findings of this study reinforce that high priority should be given to maintain and improve physical appearance of the cafés so as to differentiate them from their competitors. The results of the study are consistent with the results obtained by Waxman (2006), Wang (2000), Schmitt and Simonson (1997), and Ly (2011), suggesting that in the present-day scenario, an exotic experience does not only depend upon the coffee quality and may not be enough to pull consumers in the café. Coffee shops need to offer relaxed physical surroundings where the customers can enjoy and get enough personal space to be comfortable in.

One of the factors studied during the research was convenience, which managers should not overlook, as most of the new entrants in the café market will have to work hard for the convenience factor. Convenience is something that gives Café Coffee Day an edge over its competitors as its outlets outnumber other players in the market. Coffee chains will have to situate themselves in easily accessible areas, as location can play a vital factor in determining the number of customers they receive. A coffee shop needs to have numerous features for success. This research will give coffee outlet owners and managers a better insight of the customers' perceptions and assist them in developing competitive strategies in order to differentiate themselves from their competitors.

## Limitations of the Study and Scope for Future Research

The study was conducted with a sample size of 120 customers in order to generate findings in the Delhi NCR region. However, such a sample may not be representative of customers in other parts of the country. Six dimensions were selected to rate the perceptions of the customers ; however, there may be more factors effecting consumers' decision making while selecting a coffee shop. Generalization of the results needs to be conducted carefully.

There are a number of players who are entering into the café market in India, and future research may include more coffee outlets like McCafé, Dunkin' Donuts, and so forth in order to have an improved comparison. The current research did not consider the effect of demographic variables on the perception towards coffee chains and ,therefore, further studies can be conducted to incorporate the effects of variables like age, gender, income levels, and profession on the perception of the consumers. In addition to this, future research may be conducted to examine the effect of location on coffee outlets (for example, colleges, hospitals, office complexes, malls, and so forth) as well as geographical areas classified on the basis of income penetration on the decision making of the people.

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