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AN EXPLORATION OF STORE ATTRIBUTE SALIENCE ON STORE CHOICE BEHAVIOUR IN AN EMERGING MARKET
– THE CASE OF VIETNAM GROCERY MARKET

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ABSTRACT

Thesis title:	An exploration of store attribute salience on store choice behavior in an emerging market – the case of Vietnam grocery market
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Key words:	Grocery shopping, store attribute, store choice, wet market, modern retailer, Vietnam
Purpose of the thesis:	The main objective of this study is to evaluate the most salient store attributes that influence store choice of Vietnamese grocery consumers. The store choice phenomenon herein is analyzed under the fierce competition between traditional grocery channel and modern retailers. The research also aims to discover underlying reasons why Vietnamese grocery consumers choose traditional channel and modern retailers according product categories. The outcome can be a reference for other developing countries in Southeast Asia region.
Research Methodology:	Research methodologies are based on relativism and social constructionism orientation and mixed-method strategy. Cross-sectional research design was employed to collect quantitative data. Semi-structured interview tactic was used to deepen understanding research problems.
Theoretical perspective:	The thesis is developed under the viewpoints of store attribute and store choice theory in retail marketing field.
Empirical data:	The research was conducted in Ho Chi Minh City of Vietnam, the biggest business city in Vietnam with high consumption expense. We targeted at the middle class group of grocery shoppers. 344 answers were collected after the survey questionnaire distribution. Interviews were conducted afterwards with those who did join in the survey.
Conclusion:	The outcome shows that there exists a difference in store choice criteria among Vietnamese grocery consumers in opting for traditional or modern retailers. Each channel has its own strengths and weaknesses; consumers, therefore, rank distinctive attributes of each channel differently.

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Chapter 1:   Introduction

Chapter 1 brings an interest to the subject by introducing background information of Vietnam retail market and then we narrows it down to grocery market; it follows up with problem formulation and research questions, the next part focus on the purpose and scope of our study. Finally, we bring the outline of the thesis to give readers a clear picture of our work.

The understanding of why a customer choose to shop at one store but not another is a vital issue of any retailers in any places all over the world. As a certain result, store choice and patronage decision have been widely studied to serve for the need of understanding and developing the retail industry in any countries. Previous studies have investigated the relationship between store choice and shopping tasks (Kenhove et al, 1999), shopping values (Sands et al., 2009), store attributes (Hansen and Deutscher, 1978), store environment (Baker et al., 2002), product assortment (Briesch et al., 2009), etc. Among such influential factors, studying the importance of store attributes on store choice decision is an interesting aspect upon its definition as the ''summation of all attributes of a store as perceived by the shoppers through their experience of that store'' (Omar, 1999). A deep understanding toward this issue will help retailers to focus and improve the most important parts in the total in-store package that they offer to their customers.

Most of previous researches in this area have investigated the issue in developed markets of rich countries. While the majority of studies of Asian countries focus on China (Chai and Zhou, 2009) or (Ho and Tang, 2006) and India (Sinha and Banerjee, 2004). Therefore, exploring the influence of store attributes on store choice in other emerging market will provide further interesting insights for the retail industry. In this case, we choose to investigate this matter in the context of Vietnam grocery market – a market with the biggest number of consumers in South East Asia, nearly 86 million people (Vietnam Government's General Statistic Office, 2008). But why is Vietnam grocery market and why is it worth studying?

1.1   Vietnam retail market landscape

Vietnam, possibly called a new Asian Tiger, is considered one of the most attractive emerging retail markets for investors, and one of the fastest growing contries in Asia Pacific, according to the Global Retail Development Index by A.T.Kearney (2008). Matthias Duehn, General Manager of European Chamber of Commerce in Vietnam stated that "Vietnam is becoming one of the most attractive retail markets in Asia with stable growth rate and strong consumption needs" (Mong Binh, 2009). The national retail sales growth has accelerated

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remarkably in the past 5 years with 31% increase in 2008 compared with 2007 (Mong Binh, 2009). The country is a potential environment for the strong development of the retail industry.

The grocery market plays an important role in the retail industry of the whole country, as the spending on grocery is over 40% of consumer's average monthly spending (Quoc Anh, 2008). The current market has two main distribution channels, the traditional channel and modern trade channel.

The traditional channel is the dominant player in the local grocery market accounting approximately 83% of total market volume share of trade (ACNielsen report, 2008). This channel includes two main types of stores, which are wet markets (mostly open aired) and small family-owned grocery stores with a condense network across the country. The channel plays a key role in the everyday lives of the local consumers when being the dominant supplier of fresh food, vegetables and other products for daily consumption of local people (Quang Anh, 2009).

Simultaneously with Vietnam's rapid development is the fast emerging Modern Trade channel. The modern channel is still in its early stage of development with robust growth of 45% in 2008 (ACNielsen report, 2008). Contrast to the small sized and family atmosphere of the traditional grocery retailers, modern retailers has large supermarkets and hypermarkets with modern in-store environment and a wide range of product assortments together with regular promotion. These new factors have lured local consumers to these stores and initially affect their traditional shopping habits. The key international players in this channel include the Germany's Metro Cash & Carry and France's Big C (Casino group).

Vietnam retail grocery market is a mixture of emerging modern trade retailers with large sized supermarkets, modern shopping environment and the dominant traditional grocery retailers with small sized operating businesses but possessing a wide spread network across the country. This has led to a severe competition between these two channels and brought up different waves of shopping to the local consumers. The market seems to be more complicate with its typical consumers, whose traditional culture of grocery shopping behavior is much different from consumers in Western nations as well as some other nations in Asia. Understanding why the local consumers patronize one type of channel and not another type is an important objective for both traditional and modern retailers in this fertilizing market. In this paper, the area of interest is to study the store choice behavior of Vietnamese consumers in the context of strong competition between traditional and modern retailers. To have a deeper understanding of the research, the problem is formulated and presented in the next section.

1.1   Problem Formulation and Research Questions

Examination of drivers that pull shoppers to one particular store but not another has long been an important objective of both academic researchers and practitioners. Clearly, highly frequent consumers' visits bring about higher business performance of a retailer. McGoldrick, an influential professor in the field of retailing generalizes this area as store choice with deliberate consideration of various elements affecting store selection process. Store choice is recognized as a cognitive process, it is as much an information processing behaviour as any other purchase decision (Sinha amd Banerjee, 2004). Up to date, several studies have provided evidence for correlation between store choice and various salient factors such as shopper characteristics and merchandise (Baltas and Papastathopoulou, 2003), psychological elements (Dash et al, 1976), relationships and loyalty (Dixon et al, 2005), product assortments (Briesch et al, 2009), store location (Clarke et al, 1997). Nevertheless, store choice drivers, though, especially vary according to market segmentation variables such as country, cultured norm, shopping situation, shopping task, shopper type, etc (McGoldrick, 2002). Therefore, it can possibly be inferred that there is no optimal answer for all markets in terms of store choice criteria. The significant issue that calls for attention of retail managers is to precisely measure salient drives for store visits in a specific market context.

Grocery store selection criteria have been studied for decades; however, they mostly conducted in developed markets such as America, United Kingdom, European countries. Considering emerging markets, a few studies has been carried out for China (Ho and Tang, 2006), India (Singha and Banerjee, 2004); but none address the issue of store choice in Vietnam – a fertilizing market for international retailers. In the situation of fierce competition between modern retailers and traditional grocery retailers as mentioned above, the critical issue turns into understanding crucial factors that lure consumers to modern trade channel, but not traditional vendors. While Vietnamese consumers' habit of grocery shopping largely inclines to traditional retailers, well-defined store choice criteria help modern retailers stay profitable and sustainable on this emerging market. Capturing such significant business concern, this dissertation brings in an in-depth evaluation of consumers' choice toward grocery store and powerful components in store choice process. As such, the investigation into store choice criteria in Vietnam is supposed to fill in the gap of practical knowledge as well as valuable contribution to theoretical standpoint of store choice in emerging countries.

Under the framework of this paper, we would focus on store attributes in evaluating the most salient factors on store choice behaviour of Vietnamese consumers when doing the grocery shopping. In addition, local press and media also address common attributes such as convenience or store location, product assortment, quality, price, etc. when discussing of current retail industry (Quoc Anh, 2008). Nevertheless, the study is not solely limited within

store attributes realm; it leaves the results open for possible relating causes for store choice to some extent. It is due to the fact that culture is considered an important and noticeable factor in the shopping behaviour of the Vietnamese, who belongs to emerging market with lots cultural differences compared with other emerging markets or other Asian markets. This matter will be taken into account during the research process. Besides, product categories, fresh and non-fresh specifically, need to be noticed in this study due to grocery shopping and eating habit of Vietnamese consumers. Based on this problem discussion, the following research questions emerge.

What are the most influential attributes that drive consumers to a modern retailer compared with those of traditional retailers in Vietnam business environment?

Are there any differences in store choice criteria in terms of product categories?

1.2   Purpose

The purpose of this study is to provide assessment on possible attributes affecting store choice decision of Vietnamese consumers in grocery market – a developing market in Southeast Asia with vastly typical and complicated characteristics as mentioned above. The study presents important insight for both current and future international retailers who want to enter this potential market. Not to be missed, the research results are expected to contribute to the theoretical stream of store choice criteria.

Chapter 2: Literature review & Theoretical framework

Chapter2 presents current situation as well as potential of Vietnam grocery market including its consumer characteristics and its retail channels. The following part brings upon relevant literatures about store choice and store attributes. In the last part of this chapter, we provide an overview of the transitional markets to give readers a deeper understanding of our research field.

2.1 Vietnam grocery market

2.1.1 Market overview

Vietnam retail market is a young market with recent development from 1995. With nearly half of million stores under various types across the country, the country retail landscape looks promising with huge opportunities for retailers in the coming years. The young and vast population of 86 million people opens up plenty of space for retailers upon entering the market.

The country has totally 53 cities; among those are 6 key cities that bring the majority of sales across the retail market in Vietnam. These cities account for 14% of the country population, still the sales in their areas is roughly 40% of national retail sales in 2007 (ACNielsen report, 2008). The grocery market plays an important role in the retail industry of the whole country, as the spending on grocery is over 40% of consumer's average monthly spending (Quoc Anh, 2008). The two biggest cities are Hochiminh City and Hanoi, the former locates in the South while the latter in the North, from which most of the turnover comes. Due to the limitation of resources and time, our study will place focus on Hochiminh City. This is not only the most populous city with 9 million people but also the most developed one in terms of economics and finance (Thanh Binh, 2010). The retail market in general and the grocery market in specific here is developing robustly with the participants of both domestic and international retailers.

2.1.2 Major distribution channels of grocery market

As having introduced in the background of the paper, Vietnam grocery market consists of two main channels – the traditional channel and the modern trade channel. The following part will define the major characteristics of each channel.

2.1.2.1 Traditional channel

The traditional channel mainly consists of two types of stores, wet markets and small family owned grocery stores. This channel remains the dominant player in the grocery market and plays a significant role in the daily life of local customers (Quoc Anh, 2008). The channel accounts for nearly 80% share of national trade (ACNielsen, 2008).

Wet market is generally an open aired market near resident areas selling fresh food, vegetables, fruits and other consumer products for daily use. The collection of fresh food here usually includes poultry, pork, beef, fish, seafood and other unfamiliar meat such as goat, frog and reptiles. All of them are newly butchered. Sometimes, poultry and fish are kept in the cages or basins and will be killed when the shoppers want to buy. This is the concept of "fresh" food and considered important by most traditional shoppers. There are approximately 400 wet markets with different sizes in Hochiminh City serving for the daily consumption of the people here (Mong Binh, 2009).

Small family-owned grocery stores are a traditional grocery store in Vietnam. The store is usually small with an average selling area of around 15-18 meter square. The products sold here are package food (biscuits, confectionary, snacks, soft drinks, milk, etc.) and household or personal care products (laundry detergent, shampoo, toothbrush, tissues, beauty care product etc.). Because of the limited space of selling, products are condensely displayed or being kept in the stocking area behind the selling area. The store owner usually has a majority part of familiar customers who are living in the resident area surrounding. These small grocery stores are widely spread with hundred thousands of stores (Hong Nga, 2008).

The traditional channel has a major advantage of convenient location and the fresh food they offer. With the tradition of eating fresh food, wet markets are still considered the best place offering the fresh food and low price for their everyday needs (Quoc Anh, 2008). It is therefore not surprising that a major part of customers visit the wet markets almost daily (ACNielson report, 2008).

2.1.2.2 Modern channel

The fast emerging modern trade channel is growing tremendously in term of store numbers and contribution in total retail sales. At the moment, the country has around 400 supermarkets, 60 commercial department stores which are mostly located in the two biggest cities - Hochiminh City and Hanoi (Mong Binh, 2009). The key players in this market include both local and international retailers with various strengths to attract local customers.

The local retailer named Saigon Co-op is the number one modern trade chain in Vietnam with highest awareness in Hochiminh City. The store chain has an advantage of location in busy

areas in the city compared to other international retailers like Metro Cash & Carry and is a quite convenient place for shopping fresh products daily. Regarding the foreign retailers, Metro Cash & Carry and Big C (a supermarket chain belongs to the French Casino group) are the two strongest among the international players in the market with growth of over 40% per year. Specifically, Metro Cash & Carry earns 450 million dollars and grow 45% in the year 2007 (Tri Duong, 2007). This chain has an advantage of price and product assortment. However, most of the store locates quite far from the populous areas and the products offered are in larger quantity or larger sizes than usual ones. This practice does not always fit with any customers in Vietnam as they usually do shopping frequently but with small quantity (McDonald et al, 2000).

Vietnamese customers have visited and shopped at the supermarkets more frequently than before, although the rate of visit occasion is still quite low, averagely twice per fortnight compared with daily visit to wet markets (Quoc Anh, 2008). The visit frequency to supermarkets has increased in previous years, with 43% of customers in Hochiminh City visiting supermarket weekly. Nevertheless, supermarkets seem to be favoured mostly for the personal care and household products (Quoc Anh, 2008).

2.1.3 Consumers in the markets

According to the statistical report, consumers in Vietnam are largely in the age range of 22-55, accounting for 70.25% of the total population (Education & Era, 2009). These young consumers also have relatively high Consumer Confidence Index during previous years (Quoc Anh, 2008). Regarding the personal or household income, the majority of people in the lower to upper middle class account roughly 70% of the total population in two key cities (Nguyen Thanh Tuan, 2007). Their monthly income is from US$250-US$500 per month (Thanh, 2008). These consumers are the target group that our study will focus. They are not only the majority part in key cities but also the group who do grocery shopping in both traditional and modern channel. While the lower class group mainly do grocery shopping in the traditional channel due to their very limited budget.

Regarding their shopping behavior, as having mentioned above, the local consumers enjoy "fresh" food for their daily meals (Quoc Anh, 2008). Most of them have the habit of buying fresh food at the traditional markets. Moreover, they also want to shop at the convenient place in a walking distance from their home. This is one of the most important factors in their shopping behaviour (Quoc Anh, 2008). Besides, the limited storage space at home is also another reason that creates such shopping habits of the local consumers (Mcdonald et al, 2000).

However, these shopping habits meet alteration with the emerging middle class in key cities who are young, professional and willing to integrate into the big world (Quoc Anh, 2008). They are the influential group for retailers to gradually change the shopping culture of these local customers, bringing them to a modern grocery shopping instead of traditional grocery stores which are mostly served for basic needs.

At the moment, there are just articles publishing on local newspapers considered to be a major source of information regarding the grocery market situation. Most of them focus on the potentiality of the markets and the update news or information for the landscape. The other source of information coming from companies specializing in market research operating locally; however, it is usually served for business purpose. There is a lack of studies that focusing on understanding the customer behaviour toward store choice decision and how salient the store attributes play on their decision when choosing which kind of grocery store to do their shopping – a traditional store or a modern trade hypermarket.

In such scenario, there is a need of studying and understanding the influential factors that affect the customer decision in store choice in the two major grocery channels of the country. With the growing disposable income and integrating level to the world, local customers are now being offered various choices of grocery shopping destination. It is, therefore, necessary for the researchers and local businesses to understand what store attributes that can motivate customers to choose their preferred point of purchase.

2.2   Literature Review

This chapter reviews the previous studies related to the field of our thesis, we begin with the role store choice plays in retail, it followed by illustration of store choice and store attributes, a detail description of the components of store attribute are presented for a deep understanding of our study. Finally, we explain the situation of store choice in emerging markets as well as developed markets.

2.2.1 The relative role of choice in retail setting

Individual's choice is not referred to as the decision itself, what really matters are the process that results in the decision (Corstens and Gautschi, 1983). In particular, the decisions regarding retailing are among the most crucial issues; on the one hand, retailing has grown rapidly generating large amount of revenues. On the other hand, it is because contemporary customers face with abundant choices and decisions in their everyday retail purchasing. The compound idea of choice in retail is made up from product-category choice, product-choice, brand-choice, retail-format choice, retail-chain choice, retail-store choice, retail-service choice (Rigopoulou et al., 2008). All these elements drive the buying decision, to understand the

complex process. Hansen and Deutscher point out that retailer's customers are the ones who provide the measure of attribute importance (ibid), therefore, it is necessary to study customer who is the decision maker.

Academically speaking, choice has been a major research area for the past few decades; it has been categorized as internal and external customer parameters (Kim and Park, 1997). This is analyzed by different approaches, in Pan and Zinkhan's meta-analysis, by dividing store attributes into three groups: the product relevant, the market relevant and the personal attributes which are seen as choice criteria. From a more synthetic perspective, these attributes are often bundled up as reflection of store choice criteria. Nevertheless, another view points out attributes linked to product, advertising and pricing as situational variables, whereas customer related attributes such as psychographic and past behaviour are treated as individual variables. Yet other researchers tried to pinpoint the exact attributes that influence consumer's choice decision (Rigopoulou et al., 2008).

As the brief description above about the variables in store choice, we have a sketch picture of the choice-decision process. Here, we put store choice as the focus of our discussion, for managerial purpose the controllable variable are the tools of marketing, such as pricing and service. Moreover, these attributes have been recently proposed by Pan and Zinkhan, (2006) as being the ones exhibiting the highest correlation with store-choice is in line with our proposal. It is worth to mentioning that store patronage motives are various depending on the level of markets development (Arnold, oum and Tigert, 1983). ,So it appears that less developed markets should not be the same from mature market due to different consumer preference (ibid).

2.2.2 Store Choice

Store choice can be referred to a cognitive process (Sinha and Banerjee, 2004) which demonstrates why consumers patronize to one store but not another (McGoldrick, 2002). The reason for selecting a store is explained in the way that positive attributes fulfill consumers' underlying motives (ibid). A store is chosen based on the self-confidence that the customer has regarding the store, about the nature and quality of the product and service they will receive. Customers lay emphasis on familiarity with the store, which is dependent on the perceived risk in making an erroneous purchase and the importance of the product category to the shopper (Sinha and Banerjee, 2004).

In threshold model of store choice published by Malhotra, the paper propose customer show a degree of preference for a store which is resulted from the threshold value allotted by the shopper, hence, unless the preference for a store has exceeded a certain threshold level, it will not contribute to the selection of that store. The threshold value for a shopper is influenced

largely by the store image characteristic. The characteristics identified as salient were variety selection, personnel and service, acceptable price, convenience of location and physical facilities (Malhotra, 1983).

When choosing which shop to go to, consumers are said to trade-off the value offered by alternative choice. Shopping value is a multi-dimensional construct and is often described as comprising utilitarian and hedonic value (Babin et al., 1994). Hedonic shopping value is correlated with the consumer's need to gain fun and pleasure and relates to the perceived level of shopping enjoyment. Researchers suggest the hedonic attributes are typically related to atmospheric variables including the store interior and exterior, store design and layout, the point-of-purchase and decoration and personnel variables (ibid). For customers with utilitarian shopping value, they pay more attention to the function consequence when visiting a store, including effort, time, money saving and risk reduction (Sands et al., 2009).

As no single model can incorporate all the diversified factors influencing store choice, we are going to take McGoldrick's patronage decision processes which was based on analysis of Monroe and Guilyinan (1975) and Laaksonen(1993). This model summarized that store choice is affected by various variables including habitual behavior, expectations and experience, choice activation, attribute salience, situation determined, store-product choice and segmentation variables (McGoldrick, 2002).

For habitual behavior, the shopper might have an opinion setting unconsciously relating to the habitual store when they make the actual choice (ibid).

The second factor affect store choice is expectation and experience, the role of expectations is the key in determining whether the experience of a store and its products will lead to repeat purchase. Researchers have proposed the theory that failure to meet expectations can lead to negative effect on repeat patronage intentions whereas the positive effect would exceed expectations (ibid).

The choice activation factor mainly concerns with the involvement and evaluation of the purchase. For product bought at the first time, the assessment of information seeking process is increased as consumers also seek alternatives from competitors' (McGoldrick, 2002).

For attribute salience, attitudes to store are not described in terms of a rigid relationship between perceptions and importance of attributes; it's recognized that an attribute of critical importance at one point can cease to be as salient in another context (McGoldrick, 2002). We have more detailed discussion in the following about store attributes.

Store choice is also determined by situation, which for example, can be resulted from planned journey, the store became a subsidiary consideration. Store choice is sometimes attached with shopping task. Kenhove et al. (1999) found that store choice is differentiated by the nature of the task, such as urgent purchase, large quantities, difficult jobs, regular purchase and get ideas. In Mattson's study (1982), he suggests it was these situational influences may be classified as the competitive setting, the individual's situational set and the shopping occasion. The customer may also evaluate each of the situations in light of the cost incurred and the utilities derived out of the shopping. Bell et al. (1998) argue that these costs can be put into fixed and variable costs of shopping. In a study of the two price formats, EDLP and HILO, they found that the store can influence the choice of shoppers by enhancing the perceived utilities (Sinha and Banerjee, 2004).

The last factor is segmentation variables; this element is in the category of consumer behavior, including the characteristic of the household, reference group, cultural norms and the individual shopper (McGoldrick, 2002). Cultural norms are social rules that presides people's actions toward one another. Norms is made up by two main categories: folkways and mores. The former is the routine conventions of everyday life. Generally, folkways are actions of little moral significance. Rather, folkways are social conventions regarding things such as the appropriate dress code in a particular situation, good social manners, neighborly behavior and the like. While mores are norms that are seen as central to the functioning of a society and to its social life (Hill, 2005).

High involvement purchase

Information search

New product purchase

Choice activation

Competitive activity

Experience of store

Expectations of store

Curiosity variety seeking

Household characteristics

Reference Groups

Cultural norms

Shopper characteristics

Life-style values

Shopping orientation

Shopping motives

Product choice

habit

In-store information

Perception/salience of store attributes

Minimum thresholds

Situation determined

Store choice

Attitudes to stores

Choice set

* McGoldrick (2002) – Model of patronage process

2.2.3 Store Attributes

Store attributes is defined as the ''summation of all attributes of a store as perceived by the shoppers through their experience of that store'' (Omar, 1999, p. 103). Store choice and store-attribute salience constitute the foundation for the specific reasons that consumers have for buying a product or service. Store attributes are seen as part of the overall image of the store (Bloemer and deRuyter, 1998), characterizing the service the store provides. Previous literatures have presented various conceptualizations on store attributes. One of the researches conducted by Koo (2003) proposed seven components: store atmosphere, location, convenience facilities, value, employee services, after sales service, and merchandising.

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Lindquist (1974-1975) select seven store-attributes from 26 empirical and theoretical studies: assortment, merchandize quality, pricing, convenience, merchandize styling, general service and salesclerk service (Lindquist, 1974-1975).

Hansen and Deutscher investigated the relationship between store choice and store attributes and ranked the attributes according to the importance for customers, it was based on 485 consumers' survey in major metropolitan area in America, which comes to conclusion that grocery shoppers are concerned about the store's merchandize mix including dependable products, high-quality products and good value for money. Consumers are also care about the ease of shopping process, listed as ease to find items, fast check-out, fully stocked, helpful store personnel, ease to move through store. In addition, they are concerned about the cleanness of the store (Hansen and Deutscher, 1977-1978).

Baker et al. have studied the influence of store environment on store choice, the attributes of store environment, namely, interpersonal service quality, shopping experience costs and merchandize value, these perceptions, in turn, affect store patronage intentions. Their finding suggest design cues have a greater and more pervasive influence on customer perceptions of the various store choice than do store employee and music cues. (Baker et al., 2002)

According to the 2009 survey on store choice value conducted by Nielsen Company, globally, consumers voted good value for money as the most important factor determining their grocery store choice. While location still rules the market selection but this variable is vary from one country to another, generally, this construct in terms of convenience and easy parking ranked third and fourth on the importance list. The second most important attribute for consumers around the world is whether retailer offers better selection of high quality brands and products. As today's consumer demand not only the bargain for value but also a wide range of selection (Nielson Company, 2008).

On a scale of 1 (low) to 5 (high), how important are the following factors when you are deciding where to do your grocery shopping? - Global average (point score)

| Good value for money | Better selection of high quality brands and products | The one closest | The most convenient/easy parking | Uses recyclable bags and packaging |
| 4.32 | 3.78 | 3.53 | 3.2 | 2.71 |

Base: All respondents
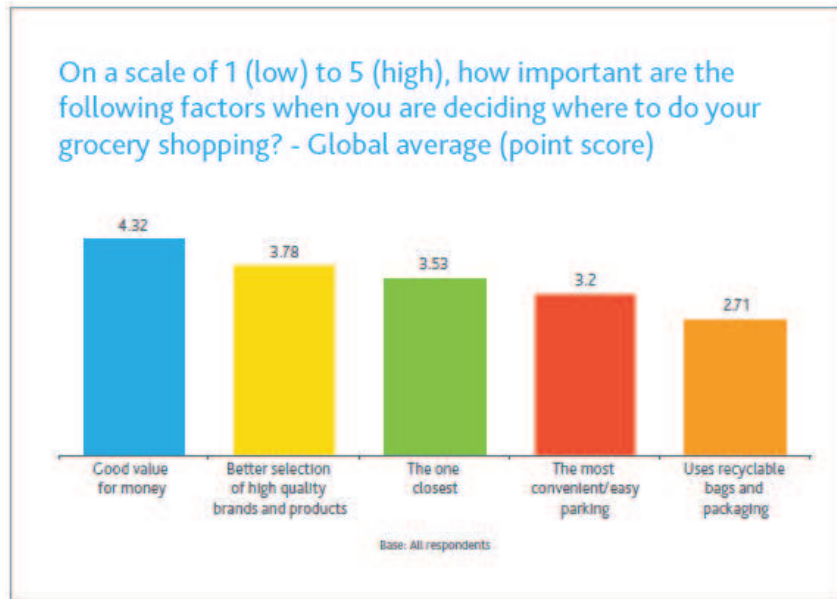
(Nielsen Store Choice Value Report 2009)

2.2.3.1 Assortment

In a finding of customers' shopping behaviour within retail format, researchers discover that stable store format features such as assortment and accessibility affect multiple-store patronage, the results suggest that customers' preference for alternative formats are interrelated (Fox et al., 2004). Studies of retail patronage have found that perceptions of variety are an important determinant of attitude and store choice (Hoch et al., 1999). First and foremost, shopper concerns variety of assortment to match their buying needs, a good variety of goods will ease shopping choice and offer a match to them unless taste is well pre-formed and purchase is routine. Furthermore, the crucial driving factor of store choice is when customer's choice is uncertain and inclination for alternatives, so that a wide range of products will lower their search cost. Finally, customer may change their preference according to different situation in order to find new stimuli; therefore, alternative options will satisfy such need (Hoch et al., 1999). On the contrary, the big variety of assortment may exert negative effect on customers who look for simple and easy solution, may perceive diversity as confusion and time consuming (ibid). On the account of above analysis, it was found that determinants of store and product assortment are quite different yet they are interlinked (Mcgoldrick, 2002). Store may be selected on the basis of their product choice which contributes to loyalty or 'defection'. Neither can it invariably be assumed that the store choice is primary and the product choice is secondary (ibid). The remedy suggest by a study states the product class where shoppers are highly choice sensitive can be used as a lever to improve patronage by offering a wide assortment including favourite brands. Inversely, retailers can reduce items number in the categories where consumers are less sensitive or have less

assortment range expectation (Amine and Cadenat, 2003). Another study suggest the same argument about the relationship between patronage and assortment and favourite brands, besides, it also shows that the number of SKUs per brand, the number of sizes per brand and number of unique SKU do not contribute to patronage (Briesch et al., 2009).

The study of Shinha and Banerjee showed that shoppers demanded good service as well as quality merchandise from the retailers (Sinha and Banerjee, 2004). In a study of supermarket patronage reason among Chinese consumers, the variable of merchandise quality, assortment and low price are critical for them to decide which store to shop. Investigation designates that the most important factors for consumers to choose goods are listed as: food safety, reliable label of green food, rich variety, enough stocking, and good value for money. At the same time, customer emphasize on goods quality as the price competition became fierce as well as the emergence copy-cat (Chai and Zhou, 2009).

2.2.3.2 Pricing
Previous study has found that a group of loyal shoppers that routinely select their grocery store based on price literally. However, there are also other types of shoppers who place store choice not only according to price but also other store attributes (Saporito 1995). Another study verified the importance consumer put on pricing in initially choosing and then continuing to shop at a given store (Freymann, 2002).

Price is a key attribute for consumers, as it is a common and salient store attribute for most consumers in any purchase decision (ibid). Therefore, researchers have studied how consumers form their perceptions in response to various types of retail pricing and price related promotional strategies (ibid). Lichtenstein et al (1993) found that consumer's perception of price can affect purchasing behaviour positively or negatively. People are willing to pay a high price for a product when they perceive price in a positive role, such as premium price represents prestige, status or high quality. On the other hand, consumers who perceive price negatively tend to respond to low price and sales promotion. They are not concerned with the quality they will get with the price they pay (Moore and Carpenter, 2008).

2.2.3.3 Store layout
Display effect also measures the longer-term effects on store image and patronage (Mcgoldrick, 2002). For shoppers visit a store the most pivotal experience is convenience e.g. spacious, have easy access to goods, so space is needed in order to create a pleasant shopping experience. Layout is one of the factors that might affect consumers' expectations, poorly designed layout may cause customers to suffer psychic costs and further reduce shopping

pleasure (Baker et al., 2002). From the point of hedonic view, choice driver includes in-store service and attractiveness of the physical layout (Sinha and Banerjee, 2004).

2.2.3.4 Promotion

A study on effect of store-level promotion on store choice found that the short-term effect of promotions on store choice is significant but weak; store choice is mainly derived from loyalty (Volle, 1999). In the category of grocery shopping, it is supposed that store level promotion are 'unexpected events' and most shoppers do not anticipate (ibid). This study argues that marketers should see the in-store promotion as a mutually accepted and necessary investment with almost no consequence in the short-term, but ought to view it as a managerial tool devised to build a competitive price image without immediate measurable outcome. Moreover, adapting store-level promotion to individual characteristic seems to be irrelevant which in turn wouldn't contribute to patronage (ibid). In addition, ECR study shows that "efficient promotion which add costs, inflate inventories do not in practice influence consumer's patronage decisions." (Mcgoldrick, 2002).

2.2.3.5 Parking

Waerden et al. (1998) investigated into the effects of changing the parking situation in the surrounding of shopping centres on consumers store choice behaviour. Retailers try to control the accessibility with a variety of infrastructural and regulatory measures, including parking measures, which are related to the number of available parking space, parking costs, maximum parking duration and the location of parking spaces, and the diversity of parking supply (Waerden et al, 1998). Vander Waerden and Borgers (1994) found empirical evidence that the location of the chosen parking lot has strong relation to the location of visited stores. The probability for customers to visit stores in the surrounding of the chosen parking is higher than visiting stores located at some distance (ibid).

2.2.3.6 Store atmosphere

The role of ambience may influence consumer's patronage choice (Kotler, 1973). Shopping atmosphere is much of a hedonic factor which determines the value of merchandise. The shopping experience has found to play an important role in building store patronage (Sinha and Banerjee, 2004). Darden, Ordem and Darden (1983) found that consumers' view on the physical attractiveness of a store had a higher correlation with patronage decision than did price level, selection and merchandise quality (Baker and A. Parasuraman, 1994). Visual, aural, olfactory and tactile are the factors in in-store ambience (Mcgoldrick, 2002), which are accounted for psychological cost of the shopping (Baker et al., 2002). There is one model explaining how service environment affect store choice, proposed by Baker and Bitner suggesting that store environmental dimensions influence consumers' perceptions of store choice criteria including interpersonal service quality, shopping experience costs and

merchandise value, these perceptions in turn affect store patronage intentions (ibid). Empirically loud music or gloomy light in a store would annoy customer and further hurt their merchandise value (it is a function of perceived merchandise price, merchandise quality, and shopping experience costs) (ibid). However, attention should be given to potential customers who may ignore evaluating the value of shop experience; leaving the impression that store environment may cause high-level shopping experience as well as high stress (ibid).

2.2.3.7 Location

Leszczyc and Sinha (2000) suggested that store choice was a dynamic decision and could be conceptualised as a problem of deciding when and where to shop. A widely accepted theory for store selection, i.e. the central place theory, claims that location has always been a critical factor in attracting customers to a shopping area (Craig et al., 1984).

A study done on patterns of store patronage in urban China found store location, more specifically, the distance to store is often critical to store patronage. In this case, considering lots of urban Chinese consumers walk or cycle to stores, some retailers offer free shuttle bus to transport consumers from other parts of the cities (Uncles and Kwok, 2007). Clarkson et al (1996) and Wood and Browne (2007) focused on the conceptualization of techniques for determining the optimal location and sales of the stoes. Many researchers found that store location plays a crucial part in determining the store choice. Location suggests customers' accessibility to the store and includes factors such as distance, and time travelled to the store. It was found that consumers prefer to shop at stores that they have easy access to and are convenient for them (Fox et al, 2004).

2.2.3.8 Customer service

Customers look for essential purchase (e.g. medicines) is in the utilitarian dimensions, which is the reason for them to choose the store. Whereas, store choice stems from hedonic dimension is more apt to care about the in-store service and the physical layout (Sinha and Banerjee, 2004). Also it is critical that retailer's service delivery is valuable to customers in order to strengthen patronage; retailer's in-store service includes core service, servicescape and employees which are the drivers of customer's perceived value and patronage intention (O'Cass and Grace, 2008). In the realm of personal service, there is large potential for retailers to improve shopping experience for customer in terms of efficiency, appearance, attitude, availability and product knowledge (Mcgoldrick, 2002). Even in today's market which is mostly run by self-service check outs, the service offered by store stuff play a significant role on retail images and patronage (ibid).

2.2.4 Store choice in emerging markets

A transitional market like Vietnam has its own features in terms of store choice. For market in developing country, a study on Greek grocery sector found, on the one hand, merchandise quality and product assortment determine store patronage. On the other hand, customer attach great importance to store location as the cost of transportation is relatively high (Baltas and Papastathopoulou, 2003). Another study examines Chinese consumer's store choice over wet market and modern retailer, users of the two markets show different patterns of food-shopping attitudes and behavior. Apart from that, food-shopping needs vary from area to area in mainland (Ho and Tang, 2006). Study tapped into finding reasons of patronage in supermarkets in China demonstrated that shopping environment, perceived convenience, merchandise awareness and service evaluation have impact on patronage of supermarkets. It found that consumers of different ages have little difference in choosing a supermarket, nevertheless, customer of different ages and different monthly income have major disparity in shopping environment, further more, consumer in different district have different choice standards for supermarkets(Chai and Zhou, 2009). However, in searching for relevant articles, we have encountered few studies on the subject of Vietnam market; one of the researches focuses on the Vietnamese grocery buying pattern in supermarkets, the other one concentrates on shopping motivation, supermarket attribute and customer loyalty in Vietnam. Nevertheless, the specific research area concerning store choice in relation to store attributes is hardly ever made their appearance. Moreover, the complex retail channels of traditional formats, wet market and modern retailer make the store patronage an area with many different characteristics. Thus, our study will contribute the knowledge gap in both the academic and managerial world.

2.2.5 Store choice in developed market

On the contrary, consumer in developed grocery market emphasize more on reducing shopping time, costs and effort (Kim and Jin, 2001). For Swedish consumer, they reckon assortment, store communication factor, merchandise quality as the top three variables influence their grocery store choice (Kaynak et al., 2005).

2.3 Conceptual framework

In the previous part of this chapter, relevant theories and studies have been reviewed to give out a picture of store choice decision in the retail market. In this conceptual framework, the approach of the study is presented and main hypotheses are drawn out. All relevant aspects that give clues to the research questions and the purpose of the study are demonstrated. This leads to a better understanding of the study approach and the main theories included in the

framework. The focus of the framework is the influence of store attributes on store choice decision in the two main channels of Vietnam grocery market.

2.3.1 Major variables influencing store choice

From previous theories and studies in the literature review, it could be summarized that store choice is affected by various variables such as habit behaviour, expectation and experiences, store attributes, customer attitude, shopping situation, segmentation of customers, store activation or competitor's move, etc. (McGoldrick, 2002). All have an influence on the store choice decision directly or indirectly. There is no single model that can incorporate all the diversified factors influencing store choice (McGoldrick, 2002). To simplify the reality, this paper just incorporates only the relationship between the salience of store attributes on store choice decision. This relationship is affected by segmentation variables, including major variables such as household or shopper characteristics, cultural norms and reference groups. Therefore, three major parts that we put into consideration are segmentation variables, store attributes and store choice.

2.3.1.1 Segmentation variables

The most common variables are household characteristics, reference group, cultural norms and shopper characteristics (McGoldrick, 2002). These also include social and economic situation of customers, their personalities, education level and occupation. For instance, a study of Lumpkin showed that young shoppers are less price conscious and do not care much about the proximity of residence to the store than the elderly people; shopping to them is a recreational activity and they tend to choose a store with high entertainment value (Sinha and Banerjee, 2004). These segmentation variables in turn affect the perception of store attribute salience.

Among these variables, in the context of Vietnam grocery market, it is worth to focus on the variables cultural norms and shopper characteristics in the study. The culture of shopping grocery here has been lasting for a long time and it has become a habit of customers. People enjoy having fresh food such as fresh meat and fish, live poultry, fresh seafood, fresh vegetables and fruits together with various kinds of spices in their daily meals. Frozen food is not of that much favoured as it is thought to make the dish less delicious. From the old day, wet markets have been considered the place providing fresh food and live poultry for everyday cooking. Such cultural norm makes people go to the market to buy the freshest food they can. Besides, households used to not having a refrigerator at home due to the poor income during the low economic development period twenty years ago. People could not purchase food in large quantity and stocked them at home for long usage. It has step by step created a habit of going to the near-by market every day to buy the food for the family. This habitual behaviour then became a part of the cultural norm in grocery shopping of the Vietnamese, even when

their income is getting higher and having more condition to stock the food at home. Therefore, we can see in this context, the cultural factor seems to mix up with the habitual behaviour and it affects much on the grocery shopping habit of the local people. As a reason, we will include habitual behaviour as a potential factor that can influence store choice decision besides the process of assessing the importance of store attributes on store choice.

Moreover, although grocery shopping habit of the local almost originates from its own typical culture and economic situation, it also seems to get vary through generation in recent time. The young generations tend to shop more at the supermarkets. They enjoy the modern store atmosphere, wider range of choice for products and find grocery shopping as a part of entertainment (gttd, 2009). The favoured store type may also vary across other characteristics of shoppers, specifically sex and occupation. As the major population of the country is young and the social economic factors of local shoppers are changing fast, it is worth to study the different store attribute salience perceived among customers at different age range, between men and women, between the housewives and the working people.

2.3.1.2 Store attributes and Store choice
As having been discussed in the literature review, store attributes consist of major components such as store atmosphere, location/convenience, product assortment and quality, employees, services, pricing and convenient facilities like parking site. Store attributes affect attitude and perception of customers toward the store, then influencing to the store choice decision. In this paper, we will assess the salience of these store attributes on store choice in the two main grocery channels of Vietnam market, which are modern channel (or supermarkets) and traditional channel (including wet markets and family-owned grocery stores).

2.3.2   Excluding influential factors
As the purpose of the study is to provide assessment on the salience of different store attributes affecting store choice decision in Vietnam grocery market, the factors that are potentially influence the store choice should be excluded to avoid the bias to the result of study. This helps to ensure that the actual relationship between the influence of store attributes and store choice is investigated.

Looking back at the model of patronage process of McGoldrick again, other factors that can influence the store choice decision are shopping situation, customer's expectation or past experience, competitor's move, etc. For instance, different shopping situation may result in different choice of stores. The store may be selected as a result of a planned journey, which could be a "work-related or recreational trip" (McGoldrick, 2002). Besides, the shopping situation may be attached with different shopping tasks. The study of Kenhove et al (1999) found that various shopping tasks, such as urgent purchase, regular purchase, large quantity

purchase or get ideas, influence the decision in choosing a specific store to shop. Other situation attributes such as time pressure also have certain influence of store choice decision. Customer may go to a near-by grocery store to do a "fill-in" shopping task, but willing to go to a more distant store for their regular shopping trip (Sinha and Banerjee, 2004).

Therefore, when carrying out the research, we will put the respondents in a normal shopping context, which means their most regular shopping place with regular shopping task. In other words, all data and information in the research is generated from consumers' daily grocery shopping. Taking into account previous factors relating to store choice decision with store attributes as the focus point among the influential factors, we draw out the following conceptual framework for approaching the study, including three major parts we have discussed.

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│  │ Segmentation variables                                  │    │
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│  │     Cultural norms       Shopper characteristics         │    │
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│                              │                                   │
│                              ▼                                   │
│           ┌───────────────────────────────────────┐             │
│           │ Store attributes salience             │             │
│           │   • Convenient location               │             │
│           │   • Product nature (fresh\non-fresh)   │             │
│           │   • Product assortment                 │             │
│           │   • Product quality                    │             │
│           │   • Pleasant store environment         │             │
│           │   • Price                              │             │
│           │   • Good service\relationship          │             │
│           │   • Promotion                          │             │
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│  │ │ Traditional stores:    │  │ Modern trade stores:   │   │  │
│  │ │ Wet markets            │  │ Supermarkets           │   │  │
│  │ │ Traditional grocery    │  │                        │   │  │
│  │ │ stores                 │  │                        │   │  │
│  │ └────────────────────────┘  └────────────────────────┘   │  │
│  │              GROCERY STORE CHOICE                         │  │
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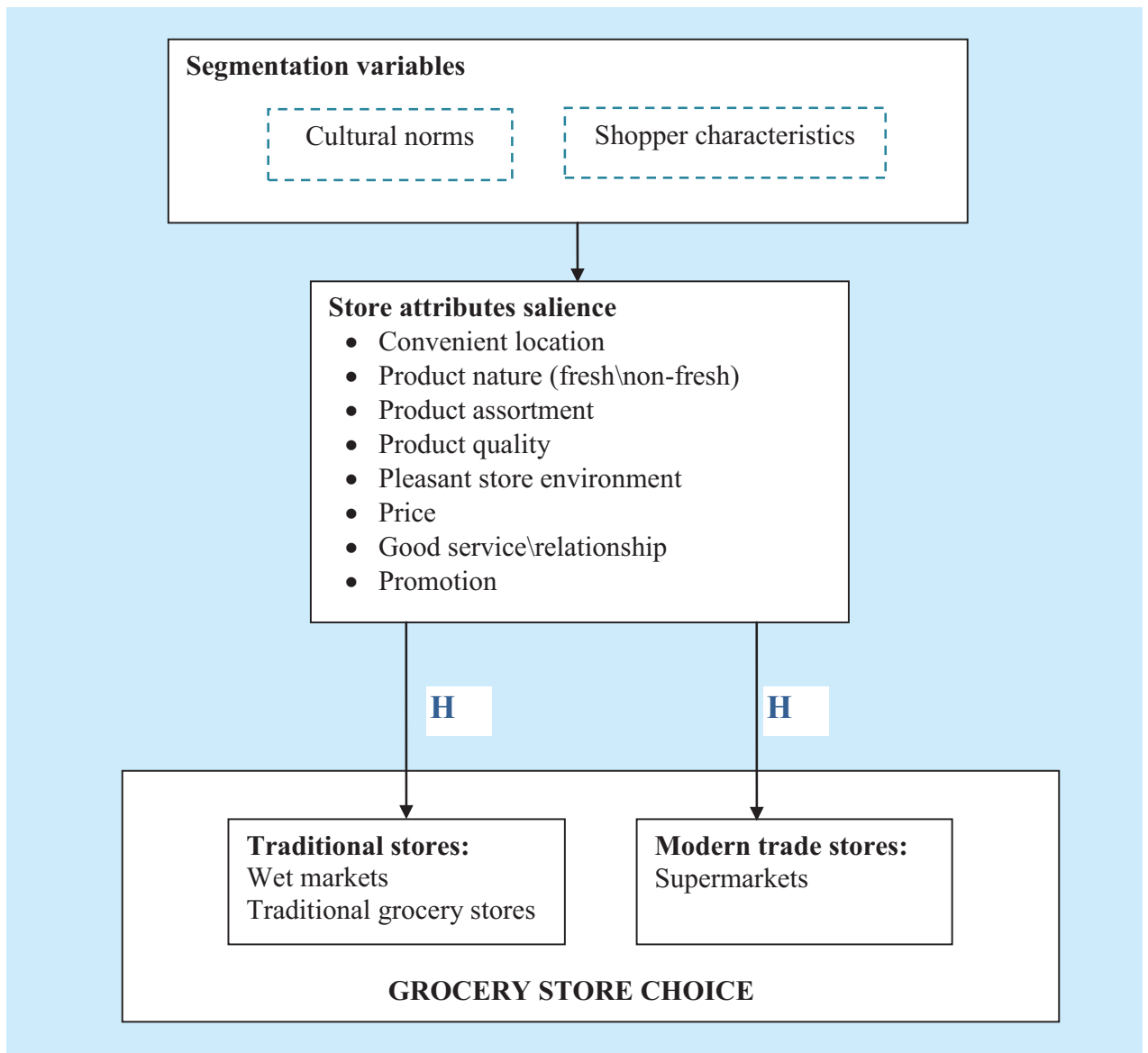
2.3.3   Hypothesis of conceptual framework

According to the framework, store attributes play a significant effect on store choice decision. The main hypothesis of this study is that the store attribute salience differs between traditional grocery channel and modern trade channel. The empirical data will support to prove these differences, finding the most influential attributes which affect store choice decision in these two major channels of the market.

Chapter 3: Research methodology

Chapter3 mentions research philosophical approach with appropriate philosophical assumptions and then research strategy. After that, research design is introduced with fit research methodologies. Explanation for specific methods and its components are clearly presented.

3.1 Research Philosophy

In the first stage of the research, it is critical to look at possible philosophical approach underlying research strategy. Philosophical factors is said to play an important role in shaping the overall arrangement of the research activity as well as bringing about correct research results (Easterby-Smith et al, 2008). In a clearer explanation, Easterby-Smith affirms that philosophical issues help recognize appropriate research designs according to "constraints of different subject or knowledge structures" (ibid). Furthermore, to produce a correct research outcome, it is crucial to have a balanced view of the different philosophical positions that direct research methods later on.

Regarding philosophical standpoint in doing the research, scientists often ponder on two terms: ontology and epistemology. While ontology refers to "philosophical assumptions about the nature of reality" (Easterby-Smith et al, 2008), epistemology comprises "general set of assumptions about the best ways of inquiring into the nature of the world" (ibid). The concern of Bryman and Bell about social ontology is that social entities have reality external to social actors or they "should be considered social constructions built up from the perceptions and actions of social actors (Bryman and Bell, 2007). One of ontology positions is constructionism (ibid), which implies that social phenomena is not only established through social interaction but also in a "constant state of revision" (Bryman and Bell, 2007). "Shopping is a socio-cultural activity in which retailers and customers are socially interdependent" (Burt and El-Amir, 2010). Our research area tapped into shopping behaviour realm, as such, we employ this assumption as a ground for the research strategy. In academic research history, determinants of shopping motive were discussed by Tauber with the claim that "grocery shopping is a customary activity of the housewife" (Tauber, 1972); however, Buttle (1992) pointed out that Tauber failed to acknowledge the role of culture and social custom as going international. Moreover, the world is changing day by day, and "there have been many demographic, social and retailing changes" which possibly impact upon shopping behavior, "the role of shopping in community and personal life and the character of the shopping experience" (Buttle, 1992). As a result, we assume that grocery shopping phenomena follows constructionism viewpoint.

Epistemological considerations discuss if social world should be studied according to the same principles, procedure as natural sciences (Easterby-Smith et al, 2008). The notion of epistemology indicates that "knowledge is only of significance if it is based on observations of this external reality" (ibid). In response to ontological assumptions, we propose to apply relativism and social constructionism (ibid) in this research in order to produce a pragmatic result because "even self-confessed extremists do not hold consistently to one position or the other" (ibid). Relativist position presumes that there is obstacle in directly access to reality and researchers have to use "multiple perspectives" and surveying of views of individuals. It brings the outcome of correlation, accepts "value of multiple data sources "and "enables generalizations beyond present sample" (ibid).

Social constructionism is another epistemology of social science. Its perspective is that "reality is not objective and exterior, but is socially constructed and given meaning by people" (Easterby-Smith, 2008). According to philosophers in this field, social constructionism refers to interpretive methods (Habermas, 1970) and it focuses on the ways people understand the world through "sharing their experience with others via the medium of language" (ibid). Clearly explained, Easterby-Smith stresses that social constructionists do not gather the facts through measuring the patterns but grasp the meanings from people's experience. Social constructionism proves its strength in producing more natural data than artificial one (ibid). Looking upon our research problem, social constructionism guideline is expected to give us an insight into social phenomena of shoppers in Vietnam, which relativism approach could not provide. In the light of this philosophy, we are able to understand deeper about the underlying reasons for shoppers' behavior, which is shaped by social factors such as culture norms and shopping situations.

3.2   Research strategy

After framing appropriate research philosophical standpoint, research process comes to the next step to define relevant research strategy. According to Bryman and Bell (2007), research strategy concept is classified into two directions: quantitative and qualitative strategy and their construction base on "principal orientation to the role of theory in relation to research", ontology and epistemological orientation (ibid). Each type of research methods owns its strength and weakness; therefore, it is practically advised that researcher use mixed-methods approach to compromise weaknesses of each.

Quantitative strategy is established under deductive theory which starts with the theoretical background, deduces a hypothesis and then based on empirical findings to test hypothesis again (Bryman & Bell, 2007). It embodies the notion of social reality as an external (ibid). As the nature of the research area with ontology and epistemology assumptions that was

explained earlier, our research strategy consequently inclines to quantitative research scheme. Quantitative research gives the outcome based on measurement which is supposed to detect clear distinction between categories as well as "more precise estimates of the degree of relationship between concepts" (ibid). Also, it helps to reach large number of samples in the case of time and money constraint (ibid). Furthermore, quantitative strategy provides hard, reliable data to explore behaviour of social phenomena (ibid). Our research question aims to see the difference between shoppers' choice of modern and traditional grocery channels in Vietnam, so it is reasonable to use measurement to detect the pattern. Nevertheless, according to Bryman and Bell (2007), quantitative data is criticized to be artificial and "fail to distinguish social institutions from the world of nature". Qualitative research approach, however, can complement the weakness of quantitative in the way that it paves the way to interpret social world in its natural settings as well as underlying meanings (ibid). As a result, we are able to answer the research questions in a more comprehensive and multidimensional way.

In summary, our research strategy is a mix of quantitative and qualitative approaches. This helps to provide more confident findings (Bryman and Bell, 2007), meaning that the precise of quantitative data is enhanced by contextual understanding from qualitative analysis (ibid). Qualitative research tactics are subsequently able to facilitate quantitative tactics.

3.3   Research Design

Research design is the later step in conducting a research after shaping a clear philosophical direction. In this section, methods of data collection are presented and argued based on the perspectives of relativism and social constructionism. As indicated above, our research plan is built upon two positions of epistemology; however, the direction inclines to relativism and social constructionism. Easterby-Smith (2008). As such, type of collected data is the combination of qualitative and quantitative data, which implies different research methods (ibid).

Concerning the source for data, this research explores the phenomena of store choice in Vietnam market through two chancels: primary and secondary data. We exploit secondary data through previous academic literatures, professional analysis, official statistic report of Vietnam government, market research agencies as well as trusted publications mentioning retailing market in Vietnam. The reason underlying this decision is that these sources provide high quality data conducted by highly experienced researchers in a wide scale (Bryman & Bell, 2007). In addition, through studying previous literature, we are able to have an overview of what has been investigated, what are possible gaps that our research can fill in and areas need to be discovered. Clearly, secondary data source is supposed to provide reliable and valid

information, which is strongly supportive for the analysis of primary data. Furthermore, it helps us save cost and time when we have approximately three months to complete the research (ibid).

Primary data is different from secondary ones in the sense that it is collected for the first time by researchers through a blend of observation, experimentation and questionnaires (Chrisnall, 2001). Primary data generates a valuable resource for new insights, and "greater confidence int he outcomes of the research (Easterby-Smith, 2008). With a view to understand the store choice decision of Vietnamese shoppers, which has not yet academically studied before, it is critical for us to use primary data in drawing a constructive conclusion in the retailing industry. The methods used to collect primary data are framed by the purpose of the research, philosophical approach and research strategy. Following discussion aims at explaining why specific techniques are employed so as to produce comprehensive answers to proposed research questions.

3.3.1 Quantitative design - Survey research

Survey research is a typical technique of relativism philosophy because it facilitates the simultaneous measurement of multiple variables (Easterby-Smith, 2008). Consequently, underlying relationships between factors are potentially explored. According to Easterby-Smith (2008), inferential surveys are prevalent in the field of marketing research in the sense that it enables measuring relationship between variables and concepts. There are often prior assumptions and hypotheses about these relationships (ibid). Researchers have to create dependent and predictor which assume to have cause-effect relationship. Survey is said to be good in collecting data about opinion and behaviour of large numbers of people (ibid).

Basing on our research problem and advantages of survey method, it is rational to utilize survey method as the initial step to collect primary data; specifically, inferential surveys are employed. The need for food is assessed to be a basic need for human life (Maslow, 1970); therefore, it can be inferred that shopping for food and household goods is a common social activities for people. As such, large number of people needs to be asked for the opinion. Not to be missed, our aim is to explore the link between store attributes and store choice behaviour of shoppers. With these two reasons, inferential survey is considerably applicable and useful in collecting data.

Considering different possible options of survey method, we combine both web-based and face-to-face survey in our research. Rapid development of internet technology has paved the way for researchers to conduct survey more effectively, faster and cost-saving (Chrisnall, 2001). There are several other benefits of using internet survey such as responses are stored online and send directly to software for statistical process, user-friendly interface, personalized

questions (Easterby-Smith, 2008). In the situation that the rate of internet users in Vietnam is increasing fast, it is obviously favourable to apply web-based survey in our research. Moreover, it can save us time and cost while we have less than three months to complete the research and we could not approach consumers. In addition, the advent of social media allows us to reach larger scale of respondent in a shorter time. The degree of sampling error is decreased accordingly (Bryman & Bell, 2007). Web-based questionnaire is typically distributed to sampling group with age range from 22 to 40 years old. This group of people mostly interacts with internet applications every day, as such; our survey questionnaires can reach them conveniently. Therefore, the response rate is somehow increased to a certain extent.

Beside web-based survey design, we employ face-to-face interviewing questionnaire at selected households. This kind of survey questionnaire design is popular in marketing research since the late 1960s, taken place in household, shopping malls and public sectors (Chrisnall, 2001). Targeted respondents are women in the age range of 40-60, who are housewife and also the main food shoppers in a family. The reason is major it number of them do not use internet in daily activity. We need to have face-to-face approach in order to collect valid data from this older generation segment.

In short, survey questionnaire is our main tool in collecting primary data for this research. Two types of survey design are web-based and face-to-face. These two forms are expected to effectively reach numerous audiences in the short time with low cost as well as facilitate processing the data. It is also relevant in studying pattern of human behaviour (Easterby-Smith, 2008).

3.3.2   Qualitative design – Interview method

According to Easterby-Smith (2008), interview tool belongs to qualitative research design and is called natural language data. This method is useful in discovering views, perceptions of individuals or groups through language and the best method of gathering information (ibid). Discussing about interview as qualitative data, Bryman & Bell (2007) suggest that interview tool is also part of ethnography research; meanwhile, ethnography methodology is based on constructionist philosophy. In research practice, there are three levels of structure for each appropriate types of interviews: highly structured, semi-structured and unstructured (Easterby-Smith et al, 2008). In our research, semi-structured interview combined with casual interviews are supposed to be fitting with the purpose of our research.

The nature of semi-structured interview is that researchers have a list of questions related to the researched topic and they can either or not follow the order (Bryman & Bell, 2007). Interview process is flexible according to how interviewees response and mostly with

individuals (ibid). Semi-structured type is proved to have many advantages in the sense that it provides a clear picture of interviewee's perspective as interviewees feel more personal in nature (Easterby-Smith et al, 2008). In the same way, interviewers are able to get important explanation for specific forms of behaviours from interviewees (Bryman & Bell, 2007). Furthermore, through interviews, information is not just interpreted through verbal communication, but also non-verbal expressions such as "inflection of the voice", facial expressions (ibid), which may offer important reasons for misinformation (Sims, 1993). The mix of semi-structured and casual interview will help generate more reliable data because much of valuable ethnography data comes from the whole realm of informal talk between researcher and informants (Elliot and Jacker-Elliot, 2003).

Weighting the above strengths of semi-structure and casual interviews, it can be said that semi-structured interviews considerably support our analysis of the research. It complements the weakness of questionnaire as we are able to have insight into the reasons underlying answers of respondent. The timing of conduct will be after we do the survey questionnaire. The reason is we want to figure out what are overall pattern of store choice behaviour in different informant segments. This tactic helps us framing interview questions more precisely, and so our explanation for the trend is more accurate. Interviewees are selected from survey respondents, who are the most representative in one segment or have totally different view from others.

3.4 Method of data collection

As having discussed in the research design, social survey and semi-structured interview are applied in this study to collect appropriate data and gain further insight for answering the research questions.

3.4.1 Survey Questionnaire

The first part of the questionnaire introduces the background and purpose of the research as well as demographic data of respondents including age, gender, and occupation. Such information may give clues to figure out the differences in the result among different shopper characteristics.

The next part of the questionnaire contains five main questions with the purpose of revealing the store choice decision of consumers when doing the shopping for three main grocery product categories: fresh food, ready-made/canned food and household/personal care products. The purpose of these questions is to find out which are the most influential factors that customers consider when choosing a store to purchase such products.

As having discussed in the conceptual framework, the influential factors we are testing here are store attributes and cultural norm. Store attributes includes significant factors such as convenient location, store's product nature, product quality, store service offered by the staff or store owner, promotion, product assortment and in-store environment. These attributes have been considered carefully and chosen from the most common store attributes which are the key drivers for store choice decision of the local customers, according to the press releases of local newspapers, research result of reputable research corporation such as ACNielsen and previous studies of relating topics, which are all mentioned in the literature review part. The cultural norm in this questionnaire relates to the habitual behaviour of customers as we have elaborated in the conceptual framework. Other insights which relate to cultural norm would be discovered through the semi-structured interview in the next part.

The first question is to identify whether the respondent is a frequent grocery shopper, otherwise, he/she does not need to answer the questions coming after. Only the answers of the suitable respondents are considered to be valid for the data processing. The next three questions ask respondents about which store type they mostly do their shopping for three grocery product categories and the major reasons for choosing that store. Meanwhile, they are asked to rank the important level of these reasons from the most important to the least important level. There are five scales for ranking, vary from 1 – most important to 5 – least important. The increasing number represents the descending importance, due to the fact that the Vietnamese have a tendency to consider 1 is the best or the highest position in ranking. Thus, we need to use such scale above to avoid the misjudgement caused by the local language. As a result, the final score calculation will be vice versa to the normal score, which means that the attribute that has the lowest score will be considered the most important factor.

Besides the set of reasons already given in the statement for the respondents to choose, we also include an open space for them to state out if they have any other reason outsides the stetting question the same frame. This helps to ensure that we can investigate the actual relationship between store attributes and store choice from the data generated. The sample of the Vietnamese and English version of the questionnaire is attached for further reference in the appendix.

The last two questions are open questions. They introduce an assumption that "if wet market and supermarket are both at your convenient location for grocery shopping, at which place would you choose to shop?" These open questions allow respondents to clarify their store choice motivation in the case that wet markets no longer have its advantage of convenient location, which is claimed to be the most important attribute that customers choose to buy grocery at this traditional channel.

The questionnaire is designed to be simple, easy to understand and brief as "the shorter the questionnaire, and the simpler the questions, the more likely that people will reply" (Easterby-Smith et al., 2008). However, it is assured that every question contribute to the purpose of the study. The design of this questionnaire is also comply with the five principles of a good design according to Easterby-Smith et al (2008). Each question expresses only one idea for the respondents easily to give their answer choice. The wordings in Vietnamese are also written with simple expressions and avoid of ambiguity of using negative meaning for the main verb as well as "jargon and colloquialisms" (Easterby-Smith et al, 2008).

3.4.2 Sampling
3.4.2.1 Target sample group

To serve for the purpose of the survey, the respondents should understand the shopping motive for their store choice when doing their daily or weekly grocery shopping. Therefore, they should be people who usually do the grocery shopping for themselves and/or the families at wet markets, traditional grocery stores and supermarkets. There is no limitation regarding sex, age or occupation. However, we decide to consider in choosing the target sample group belonging to the middle socio-economic class to ensure that the sample has the same representation in term of respondent profile for both traditional and modern grocery channel. It is necessary to consider this factor as previous local press releases and local business analysis reports stated that low socio-economic class mostly do their grocery shopping at traditional channel only for the low price reason. Besides, all respondents that we try to approach are living in Hochiminh City, the biggest and economic leading city in Vietnam.

3.4.2.2 Sampling design

In order to make precise statement for the study, the sample taken should be a representative of the respective population. A probability based sampling design would be the best fit for the study as the relationship between the sample and the population can be assured (Easterby-Smith et al, 2008). This is the best form of the sampling as "all elements in the population have equal chance of being included in the sample" (Fleher, 2007). Nevertheless, the population units spread widely, which is 8,000,000 people across Hochiminh City, the random sampling method is not feasible in this case due to the cost of approaching such a big population.

In this context, we take the non-probability based sampling design to offset the above disadvantage. The purposive sampling approach is taken when considering the above characteristics of the sample group. In this method, there is a clear idea of what sample units are needed. The sample members will be approached and chosen if meeting eligibility criteria (Eaterby-Smith et al, 2008).

Besides, due to the geographical distance, we can only send the questionnaires to respondents by emails or hard-copies according to their ability to access the internet. The respondents approached are through our network with different background about sex, age and occupation, but all of them belong to the socio-economic class as required. Only answers from respondents complying with characteristics of the target sample group are considered to be valid.

3.4.2.3 Sampling size

The precision of the survey result also relies much on how credible a sample is (Easterby-Smith et al, 2008). The size of a sample needed depends on "the margin of error you are prepared to accept and the size of the population from which you take the sample" (Fleher, 2007). The margin of error usually varies from 1% to 5% according to the scope of the study. Basing on the calculation of Fleher (2007), if the sample population is around 10,000,000 and the accepted margin of error is 5%, the sample size needed is 384. In other words, we need at least 384 completed questionnaires returned from the survey. We therefore have sent out questionnaires to a sample of 600 respondents in the target group as having discussed above and hopefully the return rate is sufficient for the needed quantity of sample size. The expected questionnaire returned rate is 60% to 70%.

3.4.2.4 Representativeness and precision of sampling

Representativeness and precision are both important principles in designing a credible sampling for a quantitative research. The sample needs to have low bias in the relationship between the sample and the population, and high precision rate (Easterby-Smith et al, 2008). When bias is minimized, the conclusions from a sample can safely be applied to the population. And when the precision rate is high, meaning that the margin of error is low, the result can be considered to be precisely right. In our case, we have tried to get a sufficient sample size to achieve the acceptable precision rate. On the other hand, the representativeness of the sample may be weaker; however, we have minimized the bias by choosing the appropriate respondents that can represent for the population of the study – which are the people who can make right judgments of store choice decision basing on their own grocery shopping experience in the two main channels being studied. Therefore, the data generated from the sampling can be generalized into a bigger scope, which are the frequent grocery shoppers in Vietnam's key cities.

3.4.3   Semi-structured interview

The purpose of using qualitative interview in this study is to gain further insight into the reasons why consumers choose to buy grocery at specific store types and especially to understand how they actually value various store attributes when making the store choice decision.

The interview is purposefully carried out after the survey as we want to dig into deeper layers of the responses. Therefore, a semi-structure interview would be the best fit in this context. We begin the investigation with a fairly clear focus and approach the interviewees to generate more specific issues.

As we make the interview from a distance, we choose to interview via Skype or telephone depending on their ability to access the internet. Ten interviewees would be chosen randomly among the two groups who usually do the grocery shopping in the two channels. The interview process is flexible and expected to last approximately 20 minutes. A list of questions is used in the interview but the order may not be followed exactly as the way they are outlined on the schedule (Easterby-Smith et al, 2008), including:

a. The place where they usually do their daily grocery shopping, with detailed information according to product categories as divided in the questionnaire.

b. The underlying reasons for choosing the store and the barriers for not choosing the store

c. The perception of the store when shopping for different product categories.

d. Their viewpoints of major store attributes that influence their store choice decision and how they value these attributes

The findings from the interviews are expected to consolidate the result of the survey and provide further valuable insight for the study.

3.5   Reliability and Validity

3.5.1   Reliability
The reliability of the study is basically concerned with the issues of consistency of the measures used in the research. In our context, it should be mentioned to two major issues, which are stability and internal reliability.

The stability of the research considers whether a measure is stable over time , so that the results of the study do not fluctuate (Bryman and Bell, 2007). In our study, all questionnaires are carried out almost at the same time and the data was collected within one week. Therefore, we can be confident that the responses provided do not fluctuate across different period of time.

Regarding the internal reliability, according to Bryman and Bell (2007), the key issue of internal reliability is whether or not the indicators are consistent. When respondent's answers to question in a multiple-item measure, there is a possibility that the indicators lack of coherence. In other words, it is necessary to know whether "the respondents' scores on any

other indicator tend to be related to their scores on the other indicators" (Bryman and Bell, 2007). One of the methods for testing internal reliability is Cronbach's alpha. In our study, we also use this method to check the internal reliability of the survey. The concept Cronbach's alpha will be discussed in the finding and analysis chapter.

3.5.2   Validity

Validity is concerned with the integrity of the conclusions generated from the study (Easterby-Smith et al, 2008). The major concern about the validity of the quantitative research lies in the issue whether "the instruments and questionnaire items used to measure variables are sufficiently accurate and stable" (Easterby-Smith et al, 2008). In this context, the questionnaire items and measuring instruments are based on international and local researches, as well as press releases. We believe the error component is minimized and therefore increase the validity of the research.

For the internal validity, the conclusion should incorporate actual causal relationship between variables investigated (Bryman and Bell, 2007). In our research questionnaire, we ask respondents to put themselves in the normal context of daily grocery shopping when giving the answers to the questions. Besides the given answer choices in the questionnaire, we also offer another open space for respondents to choose if they find their response do not match with any of the available answers. This helps to raise the confident level that the independent variables - store attributes - are really responsible for the variation identified in the dependent variable – store choice.

On the other hand, the external validity is concerned with whether the result of the study can be generalized beyond the research context (Bryman and Bell, 2007). The probability of the generalization of the findings is referred back to the sample group in our sampling part above, specifically its precision and the representativeness. Basing on the standard of sampling that we used, the findings can be generalized into a greater scope, which is applied to the group of grocery shoppers (not grocery consumers) in key cities of Vietnam.

Chapter 4:   Findings & analysis

Chapter 4 provides in-depth empirical findings from quantitative and qualitative data collection. Statistical data and interview interpretation are thoroughly illustrated. After that, we present critical analysis built upon the findings. The analysis will also refer to relevant literature and previous research to point out the contribution of our research

4.1   Sample Distribution

The survey research to collect primary data was conducted during one week and aimed to reach 500 people. We expect to receive at least 384 valid responses in order to have satisfactory outcome (Colin, 2007). As clarified previously, we employed two distribution channels for the survey questionnaires: web-based and face-to-face. For targeted consumers who are able to access internet, we send them our online survey questionnaire. The majority of this group is below 40 years old and is working as an officer at state-owned organizations or multinational companies. These people have at least college education level, and at least basic salary level according to labor law of Vietnam; therefore, they have high possibility to be categorized in middle class group in the society. Online survey questionnaires are sent out via email groups of targeted networks, the most prevalent online forums of women discussing about family and cuisine. The networks include master and PhD students of Vietnam, those who are highly educated with average income compared to others in the society, officers in national and international companies, social media pages of companies and groups. Regarding face-to-face survey research, we target to get responses from housewife above 40 years old, who generally have limited access to the internet. Our friends in the network will be responsible for bringing printed questionnaire to consumers and ask them to choose the answers. Each district in the city must have a number of samples. Respondents are chosen on purpose, who are actually main shoppers in a family. We aimed at female respondent more than male ones because of the fact that grocery shopping is relatively the main task of female than male (Dholakia, Pedersen, Hikment, 1995), especially in Vietnam, where the society inclines more to masculinism. With a view to effectively collect the data, we explain clearly our purpose of the survey, encouraged people to seriously answer all the questions. During distribution period, we also continued following up with respondents to ensure data is gathered in time with high accuracy.

After one week, we received 344 responses from both channels for survey questionnaire, this is considered to be a valid outcome for analysis (Colin, 2007). In order to process the data, we use statistical tools of Microsoft Office Excel 2007 program, and SPSS applications.

Generated figures are mean values of grade for each question, standard deviation calculation, count and cronbach value for each question. According to the record, there are 246 respondents below 40 years old, which accounts for 71.51% in total population. The rest 28.49% are over 40 years old. Regarding gender allocation, it is in our estimation when female makes up for larger quantity than male respondents. In details, 81.98% of them are female, and 18.02% is male. Not but not least, the variable of occupation is pointed out as one of demographic factor that might affect shoppers' decision. The statistics shows that 68.60% among 344 people are officers, and another 31.40% are housewife. This is more or less due to the spreading scale of online questionnaire is wider than face-to-face survey.

4.2   Data analysis & findings

4.2.1   Fresh Food Category
4.2.1.1 Empirical data
In the category of fresh food, we received 344 respondents in total and all of them are frequent shoppers in a family. According to statistical calculation, the cronbach alpha indicator for the data in this category is 0.759, which is considered to be efficient and internal reliability (Bryman & Bell, 2007). As a result, collected answers for question 1 are coherence, aggregated and valid for accurate inference. Overall judgment shows that 65% of respondents choose to buy fresh food at wet traditional channel, specifically, wet market; while only 35% of them prefer to shop at modern retailers.

Looking into the respondents' demographic, 53% of people below 40 years old choose traditional channel to shop for fresh food compared to 96% of people above 40 years old opt for that channel. Clearly, there are two distinct patterns in grocery shopping behaviour according to the age. This pattern is also varied according to gender factor. As shown from the data, men have different views on choosing channels with women. Specifically, the proportion of men participated in the survey that choose wet market (47%) is nearly equal to ones go for modern store (53%). On the contrary, 70% among women answered the first question prefers wet market to modern retailers.

Regarding the store choice criteria for fresh food category, data analysis tools were employed to figure out how people prioritize each element among proposed ones. Under the scope of this research, we decided to choose four most important drivers of customers' decision to buy fresh food. In the category of fresh food, data is presented as below:

	Convenient Location	Habit	Freshness	Price	Product Quality	Service	Promotion	Product Assortment	In-store environment
Mean	1.2523	3.0946	1.9505	2.7432	4.2928	3.8649	4.2613	3.7523	4.2342
Standard Deviation	0.7607	1.1593	0.9476	1.0121	1.0970	1.1375	0.8637	1.2282	0.8451
Sample Variance	0.5786	1.3440	0.8980	1.0243	1.2035	1.2939	0.7459	1.5085	0.7141
Minimum	1	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5	5
Sum	278	687	433	609	953	858	946	833	940
Count	222	222	222	222	222	222	222	222	222

Table I: Statistical data of the option "Traditional channel" for fresh food category

	Convenient Location	Habit	Freshness	Price	Product Quality	Service	Promotion	Product Assortment	In-store environment
Mean	3.5126	3.7815	3.0084	3.4706	1.6807	3.8403	3.7563	2.3950	2.9580
Standard Deviation	1.2879	1.2566	1.3991	1.4719	1.0809	1.3899	1.1858	1.0753	1.1077
Sample Variance	1.6587	1.5790	1.9576	2.1665	1.1684	1.9319	1.4062	1.1562	1.2270
Minimum	1	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5	5
Sum	418	450	358	413	200	457	447	285	352
Count	119	119	119	119	119	119	119	119	119

Table II: Statistical data of the option "Modern retailers" for fresh food category

The importance of criteria is interpreted from the mean value. In the questionnaire, the lower the point means more important and vice versa, meaning that more important reason was marked low point. Consequently, the lower the mean is, the more important the reason is valued by respondents. To rank the four most significant reasons for each channel, four lowest mean values are accordingly picked up.

Discussing about the reasons why people choose wet market for fresh food, it can be deduced that *convenient location, freshness, reasonable price and habit* are four most major considerations of grocery shoppers in Vietnam. As go shopping for fresh food, people first think about the place that is nearest to their home and convenient for transportation. Secondly, they care about the freshness of groceries; herein it implies living seafood, fresh vegetables, fresh meat, etc. Thirdly, price is taken into account and fourthly, habit seems to largely direct shoppers to wet market. The habit can be understood as it is done from generation to generation and that activity happens every day as a routine.

The reasons for choosing modern retailers for fresh food are different. As indicated from table 2, the most important criterion is food safety, which mean the food at modern retailers are officially examined and quality proved. The second factor that pulls people to supermarkets is

product assortment, which can offer shoppers wide array of different brands and products to choose from. Thirdly, store environment is a motivating element for shoppers in Vietnam. The store atmosphere creates a pleasant ambience with cool air and exhilarating decorations that stimulate shopping intention. At last among four most ranked factors, freshness belongs to the last.

In short, numerical records prove that more people choose to buy fresh food at traditional channel (wet market) than modern retailers. The reasons are wet market can offer fresh food at cheaper price in a convenient location. Also, many of Vietnam grocery shoppers goes to wet markets as a habitual behavior. Nevertheless, modern retailers have their own strengths in offering quality-ensured food products, wide assortment, and inviting environment. Among surveyed citizens, large quantity of women favor wet markets for fresh food compared to men group.

4.2.1.2 Insights from interviews

As explained in the research methodology, we decided to conduct several personal interviews with respondents to obtain in-depth elaboration on underlying motives for shopping at specific channels. Also, they were conducted basing on the outcome of survey questionnaire, so interviewing allows validating the answers in the questionnaire.

Four women and two men among the respondents for question 1 were selected for interview session. The reason for this selection lies in the fact that more female than male answerers and women normally go grocery shopping in a family. Respondents answered most closely to the final statistical findings are selected and most representative demographic characteristics. These people are, therefore, able to provide representative explanations.

Wet market as the choice for fresh food

In the first place, we investigated why people choose to buy fresh food at wet markets. Convenient location is affirmed by all interviewees to be most crucial factor in deciding where to buy fresh food for everyday meals. *"…I go shopping for grocery for my family everyday at wet markets because it is near my home, I only need to walk in 5 mins and everything is there…"* said Ms. Mai Nguyen (housewife, 47 years old). Another judgment indicated at the beginning of the conversation by Ms. Van (officer, 35 years old) is: "*I find it convenient to buy fresh food at wet markets because I can stop my motor-bike on the way home from work, grasp some good items for dinners. I don't need to park my motor-bike and store my luggage as going to supermarkets, it really takes time*". This is a rational view because wet markets in Vietnam are mostly located in resident areas; therefore, it is easily reached in a few minutes.

In addition, motor-bikes and bicycles can run around the site so that shoppers do not need park their vehicles. For a woman as an officer, she is busy with her job and preparing meals for her family; as such, it is definitely better for her to save her time on grocery shopping. In the situation of Vietnam where women remain the main cook for the whole family and they are working, convenient factor obviously drive the decision. Not to be missed, transportation problems in big cities of Vietnam might affect the choice for wet market. This is implied by Ms. Anh Nguyen (housewife, 51 years old): "*I mostly go to wet market because I am tired of driving the motor-bike to the supermarket; traffic jams, vehicle emission and hot weather condition depress me to go to supermarkets…*" Residential areas in big cities of Vietnam are sparsely arranged; therefore, in some cases, consumers in less populated areas must drive to big supermarket in another zone if they want to go to the supermarket.

Most of the interviewees mentions about two most important location and freshness criteria when asked the reasons why choosing wet markets. Ms. Van (officer, 35 years old) added to her elaboration "*…my family likes to have fresh food in every meal; hence, I can find them all at wet markets. Moreover, I usually buy food at my familiar shops, so shop keepers know what I exactly want, I trust the quality of food products there and sometimes, I got a great deal because I am a frequent customers…that's save my time and my money also…*". Her answer suggests that Vietnamese cuisine is possibly the underlying cause for the need for fresh food. From generation to generation, people go to wet markets for daily meals and that habit seemingly becomes a normal way of life and root in people's perception. The response of Ms. Mai Nguyen (housewife, 47 years old) stresses more on this point to some extent: "*…I have been cooking with fresh meat, living fish, and fresh vegetable for my family for the half of my life. We perceive fresh food brings good taste, good for health…*" The culture norm has somehow shaped consumers' fresh food shopping behaviour in Vietnam. Additionally, Ms. Mai added: "*… I personally don't like frozen food because it reduces the good taste…*" Viewpoint upon deliciousness of fresh food compared to frozen food is somewhat subjective in a way; however, the fact is that food processing industry in Vietnam is not highly developed. The quality of ready-made, frozen food is, therefore, not at its satisfactory quality. As a result, negative impression about frozen food has been in consumers' mind for a long time.

According to statistical data, the third important reason to choose wet market for fresh food is price. We explored the underlying meaning of this point by asking interviewees how exactly price determines their choice. Almost all of the interviewees agreed that the price for fresh food at wet market is cheaper than in supermarkets. This truth can probably be explained by the fact that sellers at wet markets pay lower fee for stalls, tax, and no distribution cost. Nevertheless, when we mentioned about food safety matter as a drawback of low price, they

hesitate to say that food safety is good at wet market but they accept that. "…*Food safety might be not as good as in supermarkets and I cannot claim for any problems might happen; but for fresh food, I often buy at familiar shops, so I trust the quality…*" said Ms. Mai Nguyen (housewife, 47 years old). Added by Ms. Van when being asked about price factor, she said: "*...sometimes, at the same price, I got more amounts of food items because I am a frequent consumer. And, I must be economical in grocery shopping…*" For this idea, it brings upon the reason for ranking price as the third important reason. As income level in big cities of Vietnam is average; price is still a mindful issue as go shopping.

Basing on statistical record, in the fourth scale of importance, habitual reason is valued after price criteria and it is graded as important drive compared to other attributes. As clarified in literature review section, habit belongs to culture norms realm, which shape people's behaviour for a long time. Discussing about habit factor in choosing channels for fresh food, we realize most of the informants take for granted that fresh food is connected with wet market. Ms. Anh Nguyen (housewife, 51 years old) smiled and said "…*it is obviously my habit; I go there every day. I think it is quite normal, it has been the practice since I was born…*" Mr. Trung Nguyen (officer, 25 years old) shared with us: "*my mom is the main shopper in my family, she always goes to wet market near my house for meat, fish, and vegetable. She told me where to buy the best food, and I do the same…*"

To sum up, for people above 40 years old, especially women, they have a preference for wet market as shopping for fresh food. For people under 40 years old, they still choose wet market for certain reasons; however, the percentage is not as large as ones above 40 years old. In general, the most important reason for opting wet market is convenient location and freshness. This is not only the fact, but also the perception in consumers' mind for a long time. It is a habitual behavior, affected by culture norm of Vietnam. Among most important implications, price factor is figured out at the third place. Lower price of fresh food at wet markets drive people's decision.

Modern channel as the choice for fresh food

Although it is proved in the earlier analysis that wet market is largely selected for fresh food, there are 35% of them choose modern retailers as the main channel. The supermarket itself, owns some strengths that offset ones of wet market. As of the results of quantitative survey research, four outstanding consumers' drives to shop fresh food at super market are food safety, product assortment, store environment and freshness. In order to understand more in details, most representative respondents in this group were interviewed.

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Supermarket proves its dominant stand when almost asked people agreed to buy fresh food there because of food safety reason. They believe that quality of the food at modern retailers is guaranteed by authorized party and so, they are protected from any food related problems. Ms Duong (officer, 27 years old) expressed her worry: "*I seriously concern about food safety matter these days. Lots of food poisonous cases, negative report on how people grow vegetable, raise poultry as well as illegal food import from China. I hesitate to by at wet market somehow because of this. I find it secure to buy at supermarket…*" Ms. Linh Nguyen (officer, 34 years old) showed the same anxiety about food safety nowadays: "*I usually purchase grocery products at supermarket near my house, at least the food there is guaranteed by a company…*" Ms. Mai Nguyen (housewife, 47 years old) choose wet market for fresh food, though, she agreed that "*Food safety in supermarket is better than wet markets, if it is near my house, fresh, reasonable price, I may choose supermarket…*"In fact, there are lots of food problems in Vietnam as reported in official Medias. As interpreted from their answers, it can be understood that consumers are now anxious of unsafe food quality. In this case, it is the quality and hygiene insurance that attract consumers to supermarket.

The second most important criterion for consumers to opt for supermarket is product assortment. This is explained in the way that supermarkets offer wide array of imported and distinctive fresh food from other regions of Vietnam and even outside the country: French mussels, Norway salmon, lobsters from the southern sea of Vietnam, vegetable from the north of Vietnam, just to name some. These kinds of food are rarely available at wet markets, partly because they are slightly more expensive than ordinary fresh food and not all of them are populous for large number of shoppers. Ms. Nga (state officer, 38 years old) revealed that: "*there are some kinds of food that I only can find them in the supermarket. I often go to the supermarket for fresh food because I don't need to spend much time go around and find for every item, they are all there…*"

Noticeably in the ranking, store environment is at the third position, which implies a distinctive feature of modern retailers compared to wet market. Because of this difference, consumers have a stimulus to go to supermarkets. Realized from opinions of interviewees, majority of women enjoy strolling around the ambience of supermarkets, looking over new products or brands, or comparing prices. Some of them go to supermarket because they feel pleasant, comforting within clean and cool store atmosphere, merchandise display, music, as well as store decoration. Ms. Minh (accountant, 45 years old) is a frequent visitor at supermarket, she said: "*I like going to the supermarket. The overall store atmosphere makes me feel less stressful after work. It is bright, spacious, cool, well-arranged products and still, I can smell the scent of fresh vegetable, herbs around...*" In another contribution, Ms. Lan (housewife, 37 years old) is eager to add: "*I like visiting supermarket ever weekend with my*

husband and my little daughter, it is a kind of entertaining place for us". Other respondents chose supermarkets also stated that it is a place at leisure more or less. According to local economic newspapers, it is said that people see supermarket as a leisure place partly because there are not many good and safe entertaining areas in the big cities. For people who have children, they look for a place that can entertain their children and make them less stressful at the same time. Accordingly, modern retailers seem to be a common choice.

Discussing about the result of the first question, there is a difference in shoppers' characteristics. Men tend to choose supermarkets to buy fresh food than women. We find this is a critical fact that needs to be explored further. We selected three men participated in the survey research for the interview session. Generally speaking, they choose supermarket because it is easy to purchase, they do not need to bargain, and they don't worry how to choose a good quality ones. Mr. Hung (engineer, 30 years old) asserted that: "*I want something simple and quick, that's why I go to supermarket to buy fresh food…*" Added by Mr. Quang (officer, 35 years old), "*I don't know how to choose a good quality of fresh food, so I go to supermarket. Food sold at supermarkets is checked and ensured about quality, I don't need to bargain. So, I find it easier to go there for fresh food…*" Furthermore, men also indicated that they don't spend too much time in supermarkets, they go and pick what they need at that time and go out. This is different from shopping behaviour of women, who enjoy time at supermarket as a leisure activity.

To sum up, smaller number of consumers chooses supermarket as the main channel for fresh food compared to traditional channel. Three most important criteria that consumers consider as choosing modern retailers are food safety, food quality, product assortment and store environment. Among surveyed consumers, men tend to choose supermarket more than women. The percentage of women below 40 years old choose supermarket for fresh food is larger than that in the age range above 40 years old. This indicates that young people are likely to care more about food safety than elder generation while consumers above 40 years old still go to wet market more or less because of their long-time habit and perception.

4.2.2 Packaged food/Impulse category

4.2.2.1 General view and shopping behaviour by shopper characteristics

In this product category, traditional channel has lost its dominant stand. The rate of choosing modern channel and traditional channel is approximately equal, which is 51% and 49% respectively. Supermarkets have now started to have their voice in the category. However, only some specific segments of shoppers prefer shopping at this grocery channel.

Generally, young people less than 40 years old prefer to buy ready-made food, packaged food, various kinds of drinks and confectionary at the supermarkets, which account for 56%. Women have more tendencies to purchase these products at supermarkets than male. At the side of occupation, working people choose the modern channel more than people who are staying at home – which are housewives in this case.

On the other hand, people above 40 years old and housewives still prefer the traditional channel, including wet markets and especially family-owned grocery stores. This small-sized family owned store is the frequent shopping place of the above customers. 73% of them buy the product in this category at the traditional grocery stores, while only 37% of choose the supermarkets. Details of respondent data are attached at the index.

4.2.2.2 Empirical findings

Shoppers have different reasons for choosing to shop at modern trade grocery channel. Overall, *product quality* and *product assortment* are the two most influential reasons driving people to go to the supermarkets to buy ready-made food and confectionary. The survey result (Table III) shows that the *assurance of products*, including the quality, the origin and the food safety standard, is the number one attribute affecting this store choice decision. Another important attribute also standing out among figures in the table is the *in-store environment*. These three attributes are chosen most by respondents as most important reasons of choosing the modern channel to purchase products in this category.

Among these three store attributes, the attribute "product assurance" and "wide product assortment" has the lowest standard deviation, which means they are most agreed by respondents upon the importance level on their store choice decision.

	Convenient location	Habitual behaviour	Product assortment	Price	Product Assurance	Service	Frequent Promotion	In-store environment
Mean	3.8736	4.0690	1.9595	3.6379	1.4682	3.9425	3.6207	3.1264
Standard Deviation	1.3920	1.3238	0.9963	1.2996	0.8663	1.3244	1.2834	1.1154
Sample Variance	1.9377	1.7524	0.9925	1.6890	0.7504	1.7539	1.6472	1.2440
Minimum	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5
Sum	674	708	339	633	254	686	630	544
Count	174	174	173	174	173	174	174	174

Table III: Statistical data of reasons influencing store choice decision – Modern trade channel

For the group who usually shops for confectionary and drinks at the traditional grocery channel, specifically the family-owned grocery stores; their major reason is the proximity – the store location which is near their house. Table IV shows that the convenient location of the store is the most influential factor makes them to choose the store for fulfilling what they

want. The second motive is the price, from which small family-owned grocery store is considered to offer better price than the supermarkets. The third factor is the service offer by these store owners that make respondents to frequently visit. The fourth influential driver comes from habitual behavior. The influential ability of habitual behavior is now get over other store attributes in affecting to the store choice decision.

	Convenient location	Habitual behavior	Product assortment	Price	Product quality	Service	Frequent Promotion	In-store environment
Mean	1.5471	3.0059	3.2647	2.2235	3.4524	2.6353	3.9464	4.3609
Standard Deviation	0.9974	1.0117	0.9455	1.1551	0.9959	0.9893	0.7523	0.8625
Sample Variance	0.9948	1.0236	0.8940	1.3344	0.9917	0.9786	0.5660	0.7439
Minimum	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5
Sum	263	511	555	378	580	448	663	737
Count	170	170	170	170	168	170	168	169

Table IV: Statistical data of reasons influencing store choice decision – Traditional channel

The following result from the interview would provide deeper insight of what lie behind such responses of the respondents.

4.2.2.3 Insight from interviews

Choice of traditional channel

Respondents primarily choose traditional grocery stores for convenient location. They prefer not to spend much time to travel a long distance for buying just a bottle of milk or juice, some packaged cakes or chocolate. Besides, as the common vehicle that local people use is motorbikes or scooters, it takes some time for them to get in the queue in front of the supermarket to park the bikes and then leave their helmets at the belonging-keeping booth at the store before doing their shopping. A similar process is repeated once again upon they finish the shopping trip. Therefore, it is not convenient and a waste of time if they just come and buy a few quantities of items there. Van, an officer, said "*I just walk there (a traditional grocery store) or sometimes drop in by my motorbike when I am on the way back to home from work. I don't need to waste time for parking, leaving helmets and accessories, queuing at the cashier at the supermarket*" or the housewife, Mai Nguyen, told "*I usually go to the grocery store near home for buying milk, soft drinks like Coca-Cola, confectionary and snack. They have everything I need. Just ask the store owner and I can quickly buy what I want*". In daily life, the shopping practice of local people is that they usually do not stock a lot of food or

drinks at home. The refrigerator is of small or medium size; therefore, people usually buy what they need for a few days. When everything is running out, they will buy more.

Another reason why people choose to buy this product category at traditional grocery stores is the price and their budget for grocery shopping. The small grocery store is considered to offer lower price compared with that of the supermarket. The customers can also buy in any quantity they want, while some supermarkets only offer a lower price but with higher quantity of product units. Besides, when they go shopping at the supermarkets, there are lots of other things out of their shopping list that create a desire and lead to impulse purchase. The consumer price index which has increased much in recent years due to the high inflation rate also affects the shopping behaviour. Mrs. Thanh Nguyen – 40 year-old housewife explained "*Every time I go to the supermarket, I spend much more money than expected because there are many other products that I really want to buy when I see them displaying, although I don't plan for buying them before shopping… The supermarkets sometimes have sales promotion and make me buy more than what I need… Not only me but my neighbors also do the same. That's why it is better to buy what I and my family usually need at the grocery store near our house. We just go to the supermarket once every two weeks or three weeks*."

The next influential attribute on the store choice decision is the service offered by the retailers. All of the interviewees who usually shop at a familiar grocery store near their houses stated their relationship with the shop owner. They know him or her for a long time and the store owner understands their needs or their buying habits well. Therefore, these customers do not take much effort in finding the products they need. A response from Mr. Trung Dung is an example "I have bought milk, cakes, candies, soft drinks and many other things at the store near home for 8 years since my family settled down here. The store lady knows what I want and she can recommend the suitable product. I trust the quality of the goods here. There is no need to go around the supermarkets and spend time searching for these things".

Most of interviewees who choose to shop for packaged food or snacks, confectionary at the traditional grocery stores near their homes confirm such shopping habit has lasted for a long time. It is convenient, time saving and economical. They also have good experience with the stores from the beginning. All stated that they would shop at the supermarket if it locates near their home and the price is as low as or lower than that of traditional grocery stores. As a whole, with impulse category like packaged food or snacks, confectionary and soft drinks, people do not spend much time and effort for making the purchase. Thus, there are still a lot of customers shopping at the traditional grocery stores to take advantages of this store type.

Choice of modern channel

On the other hand, 51% of respondents choose to shop at the supermarkets for this product category. The primary reason for this group is that they feel assured of the quality and origin of the food at the supermarkets than at the wet markets or traditional grocery stores. Food safety is a major problem in Vietnam for recent years, when the product quality, hygiene and origin is not well-controlled in the market. Supermarket is considered a trustworthy place for selling products complying with the hygiene and safety standards. The 30 year-old accountant, Ms. Trang Nguyen, told that *"Buying goods at the supermarket is always more secured than those of the wet markets of small retailers. I feel better ensured when feeding my children with the milk and confectionary here"*. Another Human resource Officer, Minh Dang, reasoned that *"I usually buy ready-made food in the supermarket, at least twice a week. They have various kinds of ready-made one, look good and hygienic, taste fine. I trust the quality of the food. I can save time for the daily cooking as well"*. Besides, if there is any faulty with the food or products the customers buy, it is normally easier for them to make a claim the supermarket or ask for a refund or compensation than to a small family-owned grocery store. Ms.Viet, a bank clerk, said *"...I used to experience with such case. When there is anything wrong with the ... (products) that I bought, I complain the grocery owner, he/she then get back with the salesman of that product. Then, it takes time to receive their feedback or any positive action from the producer... I used to not receive any feedback and have to leave the case unsatisfactorily. But similar thing seems easier with the supermarket. They have more responsibility and power to solve the case"*.

The second most important attribute is the wide range of product assortment at the supermarket. There are various brands with different packed sizes displayed on the shelves and offer more choices to customers than the small traditional grocery stores. According to Mind Dang, *"... I like to have a variety of choice when buying the food for my family. It is easy to look through the shelves and take out the appropriate one. I can't do that when purchasing at the grocery store near my house... It is so small and I just can ask the store owner and depends on her recommendation... I prefer choosing by myself. There are always latest or better products day by day. It is also interesting to explore these things"*. Most of the family-owned grocery store in Vietnam is small with an average selling area of 15 – 20 meter square. The product display is therefore in density. It may be difficult to figure out the product that a customer wants among the others on display if they want to choose by themselves. Besides, not all products are displayed on the shelves, a major part of them are kept in the stocking area behind the selling area, which is beyond the eye sight of customers. It is a major problem for those customers who want to explore various products before making the purchase decision.

The next significant attribute is the in-store atmosphere; still its important level is quite much lower than the two above store attributes, referring to table II. Respondents in this group find the comfort, lighting, setting of the supermarket relevant in determining store choice. They enjoy the good display of the products, the possibility for going around, touching and sometimes smelling the products. Minh Dang said "I love the area selling ready-made food, they are really attracting and smell really good. I can even ask for tasting…". With other people, they go to the supermarket only to buy the products they want, but it is also like a relaxing trip "Going around the food and cake section is really interesting. I can discover the new launched products which could bring the new taste for me and my family. My family usually goes to Metro every weekend; it is also a way for entertaining…"

4.2.3 Household and personal care products

4.2.3.1 General view and shopping behaviour by shopper characteristics

In this product category, modern trade channel is getting its strength. The rate of frequent shopping at modern channel is 63% compared with 47% of traditional channel. Customers start to favor the supermarkets for this product category. Generally, all group of customers, by age, gender or occupation, shop more at supermarkets than at traditional grocery stores or wet-markets. The rate is especially high for those who are over 40 years old and housewives, which is over 80%.

4.2.3.2 Empirical findings

For household and personal care product category, as table V illustrates, three major store attributes stand out in the choice of modern channel, which are product assortment, product quality and frequent promotion. The in-store atmosphere comes as the next important attribute. Among them, the most influential factor is product assortment, which concerns about the variety of the product brands and various pack sizes. The second most salient attribute is product quality, and then followed by the frequency of promotion that the supermarkets offer. In this category, the most influential store attributes drive customers to the modern grocery channel are similar to the situation of packaged food category. It is just difference in the order of importance, the product quality is less important than the product assortment in this case.

	Convenient location	Habitual behavior	Wide product assortment	Good Price	Product quality	Good service	Frequent Promotion	In-store atmosphere
Mean	3.7465	3.6406	1.8618	3.6959	2.1014	3.7880	2.8848	3.1521
Standard Deviation	1.4451	1.3193	1.2320	1.3122	1.0882	1.2365	1.1429	1.2509
Sample Variance	2.0882	1.7406	1.5178	1.7219	1.1841	1.5289	1.3061	1.5647
Minimum	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5
Sum	813	790	404	802	456	822	626	684
Count	217	217	217	217	217	217	217	217

Table V Statistical data of reasons influencing store choice decision in household and personal care products－Modern trade channel.

For the choice of traditional channel, the household and personal care category coincidently shows a similar picture with the packaged-food category (See table V). Convenient location is still the most influential factor, followed by the pricing attribute. The former is almost twice importance than the latter from the figures suggesting. The other two salient attributes are habitual behavior and service, which are relatively weaker in important level than that of location and pricing. These two attributes are almost the same level of importance, but habitual behavior wins over service with a relatively small advantage.

	Convenient location	Habitual behavior	Product assortment	Good Price	Product quality	Good service	Frequent Promotion	In-store environment
Mean	1.2857	3.0397	4.0556	2.6032	4.1349	3.0238	4.2302	4.3254
Standard Deviation	0.8281	1.1621	1.3225	1.1319	1.2416	1.0842	1.0966	1.1087
Sample Variance	0.6857	1.3504	1.7489	1.2813	1.5417	1.1754	1.2026	1.2293
Minimum	1	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5	5
Sum	162	383	511	328	521	381	533	545
Count	126	126	126	126	126	126	126	126

Table V : Statistical data of reasons influencing store choice decision in household and personal care products－the traditional channel

4.2.3.3 Insight from interviews

For this product category, customers do not have to make frequent purchase. Therefore, they prefer to visit the supermarkets once a week or once per fortnight instead of going to shop at the near-by grocery store. The variety of products is placed as the most important factor in considering where to shop. Shoppers prefer to visit the stores which have deep and wide range of products with various brand names and pack sizes so that they can have more choice. Phuong Nguyen, 37 year-old clerk, said *"…I normally buy shampoo, detergent, tissues and*

other things at SaigonCoop (a local supermarket chain). There are lots of products displaying there. I can spend as much time as I want at the shelves, choosing the one suitable with me… The grocery store near my home doesn't have many brands and it is not easy to stand at the store such a long time to choose just a bottle of shampoo…" Another opinion from Nga Trinh *"For products like shampoo, body showers and other personal care ones, not only me but other women also prefer considering all brands in the category carefully before making the decision… I also want to see if there are any new products recently launched as well as there are any promotion for these products"*.

Product quality is also another concern for choosing to shop at the supermarket. The customers feel more ensured about the product origin, with similar reasons they explained when choosing supermarkets for the packaged-food category. There is another reason which has not been mentioned before, that is *"the shampoo, body cream, showers, etc. sold at the wet-markets sometimes are the fake ones. The products are sold at much lower price than that of the supermarkets. The packages look almost the same, however, the inner is worse when using… I sometimes see these fake products, therefore, I am afraid to buy them at the wet markets. I don't really trust its quality"*, Kieu Nguyen said.

Promotion or discount is also an attribute which is quite outstanding in the figures of the survey. Shoppers are attracted to the modern channel is partly thanks to this factor. The wet markets and traditional grocery stores normally do not offer any promotion activities; instead, they sometimes offer the product at a little lower price. But it seems this traditional offer has not been much attractive to the shoppers any more. Nga Trinh said *"I am attracted with many promotions offered at the supermarket. It seems every time I go to the supermarket, there is at least one product having promotion. Sometimes various brands have promotion at the same time. I feel I can gain better bargain then …"*.

For those who choose to buy household and personal care products at the traditional channel, the two most important reasons are still the location and price. Family-owned grocery stores are still the place people usually do their shopping for this product category. The insight reasons are almost the same as the ones that drive them to buy packaged food at the traditional channel. Therefore, we choose not to repeat them at this point.

4.3   Summary of data analysis

The below table is the ranking of the attributes according to their importance toward customer's store choice decision.

Fresh food

Reasons for choosing traditional channel

	Mean	Rank
Convenient location	1.2523	1
Freshness	1.9505	2
Price	2.7432	3
Habit	3.0946	4
Assortment	3.7523	5
Service	3.8649	6
In-store environment	4.2342	7
Promotion	4.2613	8
Quality	4.2928	9

Reasons for choosing modern channel

	Mean	Rank
Quality	1.6807	1
Assortment	2.3950	2
In-store environment	2.9580	3
Freshness	3.0084	4
Price	3.4706	5
Location	3.5126	6
Promotion	3.7563	7
Habit	3.7815	8
Service	3.8403	9

Packaged food

Reasons for choosing traditional channel

	Mean	Rank
Convenient location	1.5471	1
Price	2.2235	2
Service	2.6353	3
Habit	3.0059	4
Assortment	3.2647	5
Quality	3.4524	6
Promotion	3.9464	7
In-store environment	4.3609	8

Reasons for choosing modern channel

	Mean	Rank
Quality	1.4682	1
Assortment	1.9595	2
In-store environment	3.1264	3
Promotion	3.6207	4
Price	3.6379	5
Location	3.8736	6
Service	3.9425	7
Habit	4.0690	8

Household and personal care products

Reasons for choosing traditional channel

	Mean	Rank
Convenient location	1.2857	1
Price	2.6032	2
Service	3.0238	3
Habit	3.0397	4
Product assortment	4.0556	5
Product quality	4.1349	6
Promotion	4.2302	7
In-store environment	4.3254	8

Reasons for choosing modern channel

	Mean	Rank
Product assortment	1.8618	1
Product quality	2.1014	2
Promotion	2.8848	3
In-store environment	3.1521	4
Habit	3.6406	5
Price	3.6959	6
Convenient location	3.7465	7
Service	3.7880	8

4.4   Analysis

4.4.1   Traditional channel

This section presents the judgment on the degree to which research results answer our hypothesis. This is based on the statistical findings and qualitative data mentioned in the previous section. According to 344 representative responses and interviewees, it can be seen that there exists a difference in store choice criteria between the two channels: traditional and modern ones. With the same measurement scales and attributes, consumers chose and rank those criteria differently as indicated by mean value, proportion rate. This outcome is not falsified with the hypothesis (H) stated at the start of the research. The following discussions are elaborating on the underlying reasons for this difference as well as its connection with significant retailing theories.

As a whole, the picture of retailing sector in developing country is dissimilar with that in developed country. With the existence of wet markets and family-owned stores, modern retailers meet distinctive challenges in order to succeed in the market. Detailed reasoning about why consumers choose traditional channels can be a good source to understand further on retailing in developing country like Vietnam.

In accordance with the data, the outstanding attributes that drive customers to choose these stores across all grocery product categories are convenient location, fresh food, price, service or relationship with store owners and shopping habit. Convenient location herein implies the ease of access from consumers' home. Vietnamese consumers choose traditional channels for fresh food mainly because its location is near resident areas within a walking distance. This preference is initially explained by the cooking habit and transportation difficulty in the big city. This factor was actually tapped into by McDonald et al (2000). He observed that poor roads and limited transport in big city of Vietnam led to reluctance to shop for daily food in a far distance. In a similar research on retail location, Samuel et al (1996) found quantified that there was a "strong relationship between distance travelled and shopping frequency". In reference to store salience for store choice, location of traditional channel resembles store location. They found that location has always been a critical factor in attracting customers to a shopping area (Craig et al., 1984). Many previous researches that we studied ealier also figured out the crucial role of location in store choice decision such as Fox et al (2004), Leszczyc and Sinha (2000), and Wood and Browne (2007). Although there are several ongoing projects to improve road quality in Ho Chi Minh City, problems of public transportation in this city could not be solved in some years to come. As a result, the priority for location in grocery shopping among Vietnamese consumers is predicted to exist for a

couple of years more. Compared to neighborhood markets in Asia such as India and China, we see that convenience factor in store choice is also dominate.

The next influential factors that influence Vietnamese shoppers' inclination to traditional channels are freshness (for fresh food category) and price (for packaged food category). Because of the difference in market characteristics and culture as explained previously, the need for fresh food in everyday meals drives Vietnamese consumers to traditional wet markets. In the research of Maruyama and Trung (2010), respondents also expressed that "freshness is highly valued and is regarded as the single most important element influencing the taste and quality of the meal". The outcome of our research is comparable to the finding of Maruyama and Trung (2010) when they said that freshness is among the most important criteria for choosing stores for fresh food. And, this is also the pattern for Asian consumers in general. On the other hand, this characteristic is different from shopping pattern in developed retailing market where consumers value more on product assortment, merchandise quality as well as costs and effort in shopping (Kim and Jin, 2001).

Regarding the price reason, Vietnamese consumers rank it as very important because the price at wet market is cheaper than in modern retailers. In reference to price attribute in retail marketing literature, this finding is rational. Several researchers have proved that price is a significant factor in any purchase decision (Maruyama and Trung, 2010). The price at wet market is lower than in modern retailers partly because retailers must pay less tax, fee such as electricity, water hygiene and maintenance while sellers at wet market , venue and low cost of investment (Maruyama and Trung, 2010). Gathering opinions of interviewees, we realize that although quality of food at wet markets is not as good as in modern retailers, most of them continue choosing this place for fresh food because it is nearer and cheaper. This behaviour might be referred to the concept of price perception (Lichtenstein et al, 1993). Consumers are not concerned with the quality they will get with the price they pay if they perceive price negatively (Moore and Carpenter, 2008). In order to counteract the issue of food quality, most of our interviewees expressed that they are loyal to familiar shops to ensure about the quality. In a similar research about grocery shopping behavior in big city of Vietnam, it said that shoppers make foods safe to eat using their knowledge (i.e., selection of food by color, smell, taste and feel) and preparing food such as soaking vegetables in salt water, or prolonged cooking of meat (Maruyama and Trung, 2010). Briefly, it can be deduced that price is a strong determinant in grocery shopping decision for Vietnamese consumers.

Last but not least, it is crucial to mention shopping habit as talking about the choice of traditional channel. Although habit belongs to culture norms factor as enlightened earlier, it acts as a fourth important drive for Vietnamese consumers in opting for where to shop. Talking about fresh food category separately, freshness of the food – a store attribute, is highly

wanted. In consistence with interview outcome, we recognized that local customers still have not changed their habits or likes of eating fresh meat, fresh vegetables, live fish, etc. This eating habit is a part of the culture and seems that it will take much time for the local consumers to change to their habit or preference on this matter. In comparison with store choice research in China and India, habit is not considered as influencing aspect in grocery purchasing decision. As such, this indicator calls for additional consideration for grocery shopping behaviour in an emerging market.

Concerning the packaged food, household products and personal care products, the service or the relationship with the store owner is also an important factor for them to choose these traditional grocery stores. The close and family-liked relationship has helped these retailers to retain their customers.

4.4.2 Modern channel

For modern grocery channel, after summarizing data from different product categories, it is found that the most outstanding attributes that drive customers to choose these stores across all grocery product categories are product quality, wide range of product assortment, in-store environment and promotion. The first three attributes in this result have something in common with the result of previous studies. Referring to the literature review, most of the previous studies all confirmed the important influence of high product quality and the product assortment on store choice decision of consumers in the grocery markets. For instance, the survey of ACNielsen Store choice value report 2009 ranked the attribute "better selection of high quality brands and products" the second most important reason for consumers to determine their grocery store. The study of Swedish consumers by Kaynak et al (2005) also reckoned product assortment, and merchandise quality as among the top three variables influence consumers' grocery store choice. Regarding the in-store environment, Baker et al (2002) suggested that store environmental dimensions influence consumers' perceptions of store choice criteria including interpersonal service quality, shopping experience costs and merchandise values, these perceptions in turn affect store patronage intentions.

The perception of importance of these attributes in the context of Vietnam and other countries as mentioned above may be relatively similar, however, it perhaps does not come from the same reasons. As having elaborated in the interview, the Vietnamese consumers in the studies highly ranked such attributes like wide range of product assortment and in-store environment because they find grocery shopping in the supermarket as a way of exploring new and various products in a spacious store with cool atmosphere and temperature, which is called "novelty seeking" (McDonald et al, 2000) . In other words, grocery shopping in this context is considered as relaxing or entertaining, which cannot be obtained when shopping in the

traditional channel. Regarding the product quality, these consumers insist on the food safety standard and the origin of the products. They feel more secured and assured when buy the grocery in supermarkets due to the fact that the products sold in the traditional channel is not governed strictly in terms of food safety standard and the product origin. However, it is noted that customers who choose to shop at modern channel are concern much about the quality of grocery products they purchase, while the group of customers who choose the traditional channel seems not to care much about this attribute.

The attribute "in-store promotion" has significant influence and ranked at third position among other attributes in the household and personal care product category. This finding is somehow conflict with previous finding of Volle (1999), which stated that the short term effect of promotion on store choice is significant but weak, as well as Mcgoldrick (2002) "efficient promotion which add costs, inflate inventories do not in practice influence consumer's patronage decisions". This needs further investigation to confirm the influential effect of this attribute in long term on Vietnamese consumers who often do the grocery shopping with the shopping motive coming from this attribute.

Besides, it can be noticed that the attribute "service" and the perceived in-store convenience such as reducing shopping time, costs and efforts, that developed grocery markets (Kim and Jin, 2001) and other developing market like China (Ho and Tang, 2006) emphasize, does not have significant influence on the consumers in the study who choose to shop at the supermarkets. The grocery shoppers in our context concern about the location of the store for their convenience in daily grocery shopping, however, they do not emphasize much on the time and the effort they spend for shopping in the store.

4.4.3 Further insight from open questions in the questionnaire

As having mentioned in the research design, we also include two open questions at the end of the questionnaire. They introduce an assumption that "if wet market and supermarket are both at your convenient location for grocery shopping, at which place would you choose to shop (for each product category)?" The answers are quite interesting. The below table describes the difference between the answers of this question and the answers that they have given before about the frequent grocery shopping place

Fresh food

Answers	Before assumption	After assumption
Modern channel	35%	42%
Traditional channel	65%	15%
Depend on other factors		38%
No opinion		5%

The number of customers who choose to buy fresh food at wet markets in this case drops dramatically to 15%. The main reasons that these people who keep choosing this channel is that they believe the food at wet markets is always fresher and at a lower price than supermarket. While 38% of other respondents decide to choose the place where they can get fresher, better food at a reasonable price and it also depends on their shopping time. These figures somehow predict the future of the traditional markets. It is much influenced if the modern channel can have solution to offset their disadvantage of location or if they can offer other attributes bringing more benefits for the shoppers.

Regarding the packaged food and household or personal care products, the number of choosing to shop at supermarkets if they have a convenient location jumps to 93%, while the former figure is just around 51% - 63%. This means modern channel is likely to dominant in these product categories soon once they have alternatives to compromise with the traditional shopping customs.

Chapter 5:   Conclusion

Chapter 5 provides the conclusion for this research including the summary of the major findings, managerial implication as well as theoretical contribution. Nevertheless, we also realized the limitation of the research and we propose further study subjects in this research field.

5.1   Conclusion

The first parts of the thesis have stated out the purpose of the study is to explore the most influential attributes influencing store choice decision and then ranking them according to their level of importance. A deductive research approach has been applied basing on the aim of the study. The research strategy combining quantitative and qualitative methods through survey questionnaire and semi-structured interview turn out to be an appropriate method for collecting sufficient data and consumer insights. Empirical findings and insights from the interview have proved the hypothesis and answered the research questions.

As a whole, the store attributes that drive Vietnamese customers to choose either traditional channel or modern channel are completely different. Different product categories have different store attributes influencing store choice decision. The traditional retailers have their own strengths and still take advantage of these strengths to retain their customers. The modern retailers with new influential store attributes are blowing fresh wind into the local grocery market, offering more alternatives for the local consumers. Using their advantages of large operation scale and modern store attributes, modern retailers are step by step acquiring more market share from traditional retailers, especially the share of the packaged food as well as household and personal care category. In order to grow more, modern retailers need to improve constantly the major store attributes that help to lure customers to their stores together with acquiring the attributes that the traditional retailers have made local customers to be loyal with them for ages.

5.2   Limitation

Practically speaking, a research project could not be ideal in choice of methods to produce optimal outcome. It more or less encounters certain limitations in methodologies and as such, research findings. In doing this research about grocery shopping in Vietnam, an emerging market, we foresaw several drawbacks in research tactics which are mentioning in following words.

In this research, there is somewhat a limitation in representativeness of the data. As mentioned in the method of data collection, we specifically focus on the group of shoppers in the middle class in the big business city of Vietnam (Ho Chi Minh City). The data collected, therefore, typically represents for middle class in cities that have relatively similar characteristics such as Hanoi, Da Nang, Can Tho. Consumers in smaller cities in Vietnam with less developed level or belongs to lower class in the society might not have the same opinion and behaviour.

Regarding qualitative data collection, we met a constraint in conducting the interviews. One of the elements that facilitate the outcome of interviews is to create trust and personal engagement with the interviewees (Easterby-Smith, 2008). This factor would be more favourable if we were able to talk to them face-to-face, observing their facial expressions, or body gestures, etc. Because we conducted via skype application (www.skype.com) and telephone in a far distance, we more or less could not get the ultimate outcome from the conversations. In addition, for both quantitative and qualitative data, the accuracy of the outcome also depends on the honest of respondents (Easterby-Smith, 2008), therefore, there might be a certain extent that some untrue answers.

In short, representativeness of data for every part of Vietnam and qualitative data collection process are the two notable limitations in our research. However, the outcome do provide an overview of grocery shopping pattern in major city of Vietnam and it brings consumers insights for retailing marketers.

5.3   Managerial implication

The findings and insights from the study give a number of clues to both traditional and modern retailers to improve the package of grocery service they are offering to retain and attract more customers to their stores.

The modern retailers should consider the store attributes that make a majority of local customers to shop at the traditional channel instead of choosing their store as a frequent destination. These are, as summarized from our empirical data above, convenient location, freshness of the food, price, habit and service. Actions toward these attributes would be critical in developing a strategy to attract more customers.

For instance, store location should be close to the residential area with convenient traffic surrounding, time-saving parking and belongings keeping service. Offering home delivery service for orders meeting delivery service can help to offset the inconvenient location. Taking advantage of the high density areas, supermarkets can deliver orders to the customers who live in the same area without having to bare much cost.

Another special point that is worth taking into account is fresh food category. Fresh food is part of Vietnamese cuisine and need for daily meals. To gain a competitive advantage, modern retailers need to supply this kind of product category with emphasis on the freshness of the product, various kinds of food and vegetables that the wet markets are offering. In addition, at present, there are not many good food processing companies in Vietnam that are able to reach satisfactory level in ready-made food and frozen food. So, the business opportunity is yet to be realized, modern retailers should pay attention to this special needs of their target consumers. Besides, habitual behaviour seems to affect much on the store choice decision. Local customers have a perception that the food in supermarkets is not usually fresh and new. Therefore, modern retailers should try to change this perception in the customer's eye. Having eye-catching display of living seafood, fish, shrimp, red meat etc. would attract more shoppers. Then step by step, time by time, with the economy growth, more customers will change their thinking toward the fresh food category that modern retailers offer.

For the traditional retailers, share of trade is gradually lost to the giant modern trade retailers, as more and more customers are caring more about the quality, assortment of products being offered as well as other attributes such as promotion and in-store environment. Traditional retailers need to overcome and improve their weakness in these areas and strengthen their advantages if they want to survive in this severe competition.

5.4   Theoretical contribution

Our paper has given readers an insight into the store choice between the traditional channel and modern channel in the context of Vietnam market. Comparing to similar research areas in developed countries or other developing countries previously, the study do bring new findings relating to the store choice decision in an emerging market with typical characteristics of distribution channels, grocery shopping habits and culture.

Vietnam is a typical country in South East Asia and it may share some common features regarding the socio-economic situation, grocery distribution channels, cooking or eating habits, etc. Therefore, the study can give a further look into other countries in South East Asia, such as Laos, Indonesia, Cambodia, Myanmar, Thailand, etc. Thus, the findings may be applied on a broader sense to some extend and are valuable for future reference on retail store choice.

5.5   Future research

This study sheds new light on store choice behaviour in relation to store attributes in the context of a transitional market. It provides a general picture of different grocery shopping

channels, which are chosen for different sets of store attributes. For the future research in this area, it might be beneficial to study a particular group of shoppers together with digging into their socio-economic characteristics in order to gain a deeper understanding of store choice and store attributes.

Besides, further study can be designed to explore the correlation between the store attributes when they all together have certain important effects on store choice decision of the consumers. Such insights are helpful for retailers to have a good mixture when combining the major store attributes in their marketing strategies.

Finally, we also put culture factor into consideration but only analyzed it as a mediating reason, as this variable is manifested by the eating habit of the local people, so perhaps the future study can concentrate on this issue and measure out how much influence this factor exert in the grocery shopping behaviour.

Appendix

A1 Survey Questionnaire

We are Master students at Lund University. This survey is for our graduate thesis's research on consumer behavior when doing grocery shopping in Vietnam. Please spend a few minutes and help us to give your answers to these questions below. Thank you very much for your support!

Respondent profile

Gender: ☐ Male   ☐ Female   Age:………   Job: …………………………………………………...

Do you usually do grocery shopping at the wet markets or supermarkets?

If it is "no", you do not have to answer the next questions. Thank you for your time

☐ yes   ☐ no

1. **Where do you <u>usually</u> buy fresh food (meat, fish, poultry, vegetables, fruits...)?**
   ☐ Wet markets   ☐ supermarkets   ☐ others

   What are the main reasons for you to choose <u>fresh food</u> at that place?
   More than one answer is possible. Please associate them with their level of importance from 1-5
   1: most important   5: least important

	1	2	3	4	5
Near my house, convenient	☐	☐	☐	☐	☐
My habit	☐	☐	☐	☐	☐
Freshness of food	☐	☐	☐	☐	☐
Cheap price	☐	☐	☐	☐	☐
Quality insurance, hygiene	☐	☐	☐	☐	☐
Kind store owner/staff, good service	☐	☐	☐	☐	☐
Frequent promotion/discount	☐	☐	☐	☐	☐
Wide product assortment	☐	☐	☐	☐	☐
Pleasant environment	☐	☐	☐	☐	☐
Other reasons ……………………………………………………	☐	☐	☐	☐	☐

………

…….……

2. Where do you <u>usually</u> buy packaged-food (biscuits, confectionary, snacks, soft drinks, milk ...)?

☐ Wet markets   ☐ family-owned grocery stores   ☐ supermarkets ☐ others

What are the main reasons for you to choose packaged-food at that place?

More than one answer is possible. Please associate them with their level of importance from 1-5
1: most important   5: least important

	1	2	3	4	5
Near my house, convenience,	☐	☐	☐	☐	☐
My habit	☐	☐	☐	☐	☐
Wide product assortment	☐	☐	☐	☐	☐
Cheap price	☐	☐	☐	☐	☐
Quality insurance, hygiene	☐	☐	☐	☐	☐
Kind store owner/staff, good service	☐	☐	☐	☐	☐
Frequent promotion/discount	☐	☐	☐	☐	☐
Wide product assortment	☐	☐	☐	☐	☐
Pleasant environment	☐	☐	☐	☐	☐
Other reasons ....…………………………………………	☐	☐	☐	☐	☐

……
……

3. Where do you <u>usually</u> buy household and personal care products (laundry detergent, shampoo, toothbrush, tissues ...)?

☐ Wet markets   ☐ family-owned grocery stores   ☐ supermarkets ☐ others

What are the main reasons for you to choose household and personal care products at that place?

More than one answer is possible. Please associate them with their level of importance from 1-5
1: most important   5: least important

	1	2	3	4	5
Near my house, convenience,	☐	☐	☐	☐	☐
My habit	☐	☐	☐	☐	☐
Wide product assortment	☐	☐	☐	☐	☐
Cheap price	☐	☐	☐	☐	☐
Quality insurance, hygiene	☐	☐	☐	☐	☐
Kind store owner/staff, good service	☐	☐	☐	☐	☐
Frequent promotion/discount	☐	☐	☐	☐	☐
Wide product assortment	☐	☐	☐	☐	☐
Pleasant environment	☐	☐	☐	☐	☐
Other reasons ....…………………………………………	☐	☐	☐	☐	☐

……
……

4. **If the supermarket and the wet market is at the same convenient location to your house, which place would you choose to buy fresh food? Please specify your reason.**

☐ wet markets   ☐ supermarkets   ☐ others

Reason:

....

....

....

5. **If the supermarket and the wet market is at the same convenient location to your house, which place would you choose to buy grocery products (exclude fresh food)? Please specify your reason.**

☐ wet markets   ☐ supermarkets   ☐ others

Reason:

....

....

....

Thank you very much for your support!

A2 VietNam Overview
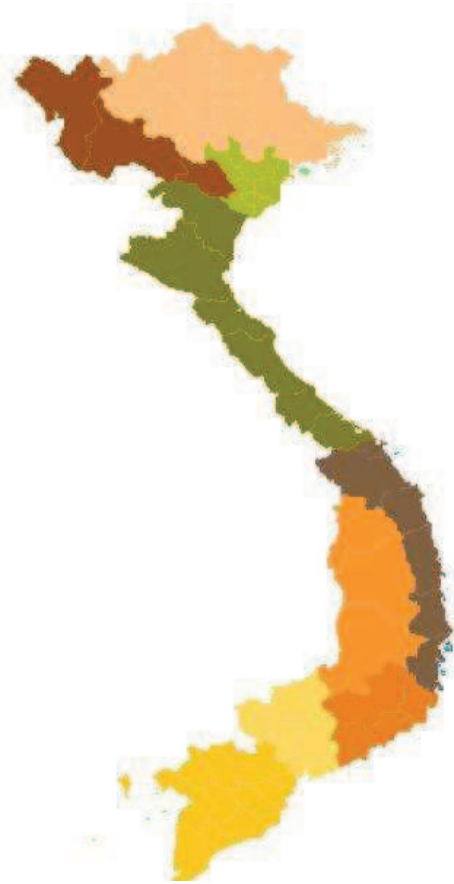
Population (preliminary data)	84,155,800
Male (preliminary data)	49.1%
Female (preliminary data)	50.9%
Rural (preliminary data)	72.9%
Population growth rate (preliminary data)	1.26%
GDP per capita 2007 (est.)	835 USD
GDP growth rate 2007 (est.)	8.48%
Inflation rate 2007 (compared with Dec 2006)	12.63%

Sources: Vietnam Government General's Statistics Office

Wet market	Family-owned grocery stores	Supermarket

A3 Global development retail index_2009

2009 rank	Country	Region	Country risk (25%)	Market attractiveness (25%)	Market saturation (25%)	Time pressure (25%)	GRDI score	Change in rank compared to 2008
1	India	Asia	54	34	86	97	68	+1
2	Russia	Eastern Europe	31	58	51	100	60	+1
3	China	Asia	62	42	47	74	56	+1
4	United Arab Emirates	MENA	89	66	50	21	56	+16
5	Saudi Arabia	MENA	70	46	68	39	56	+2
6	Vietnam	Asia	34	16	74	97	55	−5
7	Chile	Latin America	77	58	51	33	55	+1
8	Brazil	Latin America	52	60	68	31	53	+1
9	Slovenia	Eastern Europe	100	64	12	33	52	+14
10	Malaysia	Asia	65	47	48	45	51	−3
11	Algeria	MENA	17	24	93	70	51	+1
12	Mexico	Latin America	61	56	49	38	51	−1
13	Latvia	Eastern Europe	58	67	42	33	50	+8
14	Tunisia	MENA	55	37	82	24	49	+4
15	Egypt	MENA	43	25	91	38	49	−10
16	Lithuania	Eastern Europe	68	64	29	37	49	+14
17	Ukraine	Eastern Europe	30	33	46	87	49	0
18	Peru	Latin America	40	33	81	40	48	−4
19	Morocco	MENA	47	27	77	41	48	−13
20	Turkey	MENA	33	58	67	34	48	−10

Key
- On the radar screen
- To consider
- Lower priority

Legend
- 0 = high risk / 100 = low risk
- 0 = low attractiveness / 100 = high attractiveness
- 0 = saturated / 100 = not saturated
- 0 = no time pressure / 100 = urgency to enter

Notes: MENA = Middle East and North Africa; Scores are rounded

Sources: Euromoney; Population Reference Bureau; International Monetary Fund; World Bank; World Economic Forum; Economist Intelligence Unit; Planet Retail; A.T. Kearney analysis

A4 General data from survey

n=344
Sample distribution

	Age		Gender		Occupation	
	< = 40	>40	Male	Female	Officers	Housewives
Count	246	98	62	282	236	108
%	72%	28%	18%	82%	69%	31%

Store choice by shopper characteristics – Fresh food category

Choice of channel	Age				Gender				Occupation			
	<40		40>		Male		Female		Officers		Housewives	
	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern
Count	131	115	94	4	29	33	196	86	118	118	107	1
%	38%	33%	27%	1%	8%	10%	57%	25%	34%	34%	31%	0%

Store choice by shopper characteristics – Packaged food category

Choice of channel	Age				Gender				Occupation			
	<40		40>		Male		Female		Officers		Housewives	
	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern
Count	108	138	62	36	33	29	137	145	103	133	67	41
%	31.40%	40.12%	18.02%	10.47%	9.59%	8.43%	39.83%	42.15%	29.94%	38.66%	19.48%	11.92%

Store choice by shopper characteristics – Household and personal care product category

choice of channel	Age				Gender				Occupation			
	<40		40>		Male		Female		Officers		Housewives	
	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern	Traditional	Modern
Count	110	136	17	81	25	37	102	180	109	127	18	90
%	31.98%	39.53%	4.94%	23.55%	7.27%	10.76%	29.65%	52.33%	31.69%	36.92%	5.23%	26.16%

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