



**SWP 37/87 THE IMPACT OF THE CHANGED BALANCE OF POWER
FROM MANUFACTURER TO RETAILER IN THE UK
PACKAGED GROCERIES MARKET: A CONSUMER
PERSPECTIVE**

**LESLIE DE CHERNATONY
Cranfield School of Management
Cranfield Institute of Technology
Cranfield
Bedford MK43 OAL
United Kingdom**

(Tel: 0234-751122)

(Fax: 0234 751806)



THE IMPACT OF THE CHANGED BALANCE OF POWER
FROM MANUFACTURER TO RETAILER IN THE UK
PACKAGED GROCERIES MARKET - A CONSUMER PERSPECTIVE

by

Leslie de Chernatony
Cranfield School of Management

Summary

A major review of the evolution of the 3 tiers (brands, own labels and generics) in the UK packaged grocery market is presented. The shift in the balance of power from wholesaler to manufacturer to retailer is documented and the impact of this shift on the marketing of these 3 tiers considered. Consumers perceptions of these 3 tiers as a consequence of retailer dominance is investigated with cluster analysis for 6 grocery markets using 829 people. A difference in perception of these 3 tiers between consumers and marketers is recorded and implications considered.

Introduction

In 1983 multiple grocery retailers owned 8.3% of the total number of British grocery retail outlets, yet accounted for 66.8% of packaged grocery sales (Mintel 1985/86). The power of multiple retailers to influence brands' marketing strategy, through their ability to deny manufacturers access to the retail market place (Davies, Gilligan and Sutton 1985), raises the question of the future for brands. Through understanding consumers perceptions of the competitive structure of packaged grocery markets, marketers should be better equipped to respond to the increasing dominance of multiple retailers. To appreciate how the marketing of grocery brands and retailers labels has changed a review of the evolution of the 3 tiers will be presented, showing how the balance of power has shifted and the impact of this shift.

The emergence of branded groceries - The first tier

Around 1830 it was common for groceries to be sold as commodity items. These were normally produced by small manufacturers supplying a locally confined market. Consequently the quality of similar products varied according to retail outlet, where blending was common. As Britain adjusted to the industrialisation of society so consumer goods manufacturers saw opportunities caused by the rapid rise of urban growth and the widening of markets through improved transportation. At the same time though, the widening gulf

between producer and consumer led to the increasing importance of wholesalers. Manufacturers produced according to wholesalers stipulation, who in turn were able to dictate terms and strongly influence the product range of retailers. An indication of the importance of wholesalers is provided by Jefferys (1954) who estimated that by 1900, wholesalers would have been the main suppliers of the independent retailers who accounted for 87-90% of retail sales.

The increasing investment in production facilities made some manufacturers anxious about their reliance on wholesalers. During the second half of the nineteenth century some of the larger manufacturers started to affix a brand name to their product, advertising to consumers and appointing their own sales staff to deal directly with larger retailers. The era of the balance of power resting with the wholesaler was relatively short and King (1970) estimated that from around 1900 the era of manufacturer dominance was heralded, lasting through to the early 1960's.

The characteristics of brands

A brand is regarded as being an added value entity produced and controlled by a manufacturer which portrays a unique and distinctive personality through the support of product development and promotional activity. By branding, items become synonymous with consistently high quality (eg Livesey and Lennon 1978; Hancock 1983).

Gardner and Levy (1955) emphasise the way that by using several elements of the promotion mix a brand image will be evoked which in some instances may be more important than the technical features of the product. Evidence of this is reported by several authors, (eg King 1970; Allison and Uhl 1964).

Thus while there are physical elements that constitute a brand there is also the important contribution of personality to the totality. When consumers purchase a product they acquire a functional entity, when they acquire a brand they have both an emotional and functional entity.

What makes a successful brand?

One ingredient for a successful brand (either a brand leader or a major competing brand) is the benefit to consumers of added values, (King 1984). To establish a positioning for specific brands in consumers' minds, to communicate the associated added values and to make these values salient, advertising is necessary (eg Ramsay 1983; King 1978). While packaging and merchandising aid in reinforcing a certain type of positioning, advertising overcomes the problem of the pack being inanimate and unable to fully explain its brand personality (Hancock 1983). Advertising helps establish the brand as a unique bundle of values, without a directly similar counterpart that consumers can easily substitute (King 1984). Empirical analysis by several researchers (Broadbent 1979;

Whitaker 1983; Ramsay 1983) showed that successful brands had a share of advertising expenditure in their product category in excess of their share of sales.

Advertising alone will not ensure a successful brand. Ramsay (1983) showed that other factors associated with brand success included innovative product development, high quality, clear positioning and a general continuity in marketing development.

The value of brands to manufacturers, retailers and consumers

Several reasons are put forward as to why manufacturers brand their products. The brand name provides legal protection for the investment in developing a unique formulation along with unique image and provides the marketer with the opportunity to attract a large group of repeat purchasers. Good brands aid in building a corporate image and reduce the cost of new line additions carrying the family brand name (Kotler 1984). Branding allows the development of product differentiation and hence the marketing of different brands in the same product field which appeal to different benefit-seeking segments (Hawes 1982). By developing a sufficiently differentiated brand that consumers desire, a higher price can be charged (particularly if price comparisons are reduced due to perceived brand distinctiveness) and a higher level of profit may result.

Evans and Berman (1982) believe that manufacturers with strong brands have greater control when dealing with multiple retailers. As evidence of this Jarrett (1981) showed the strength of the Kellogg brands and then stated: "The only discounts available to our customers are those shown on our price list, and all those discounts relate to quantity bought and prompt payment. There is no possibility of special deals, just to those customers who stock private label". (p12)

Retailers, as O'Dochartaigh (1974) and Cravens and Woodruff (1986) point out, see strong brands as important since through manufacturers promotions of their brands a faster turnover of the retailers stock results. This point was made by the once Assistant Managing Director of Sainsbury, Davies (1983), who confirmed that retailers need strong brands as part of their retailing strategy. Brands also offer retailers profit opportunities.

Strong brands have positive images and Arnold, Capella and Smith (1983) cite the identification of retailers with these images as further reason for strong brands. Research by Jacoby and Mazursky (1984) showed that retailers with a poor image were able to increase this by stocking brands of a more favourable image.

Brands offer many advantages to consumers. Branding enables fast recognition of items and hence makes shopping a less time consuming experience. Brands provide a consistent guide to

quality (Holstius and Paltschik 1983) along with reliability and consistency (Randall 1985) and enable consumers uncertain about the outcome of their buying decision to be more confident (Roselius 1971). Brands may also satisfy status needs (eg Market Behaviour Ltd 1985).

The introduction of own label groceries - The second tier

Jefferys (1954) estimated that around the 1870's multiple retailers emerged in the packaged grocery sector. With the development of multiple retailers came the own label groceries. The growth of multiple retailers paralleled the increasing presence of branded goods, however due to resale price maintenance, multiple retailers were unable to compete with each other on the price of branded goods and relied upon service as the main competitive edge to increase store traffic. One way of circumventing this problem was to develop their own label range. Initially the major retailers produced their own label, (The Henley Centre for Forecasting 1982) however the degree of retailer production was limited by the complexity of the items and the costs of production facilities. Increasingly retailers commissioned manufacturers to produce their own labels which were packaged to their specification. Fulop (1964) notes that before World War II, own labels accounted for 10-15% of multiples total sales, but with multiple retailers accounting for 16.5-18.0% of food sales (Jefferys 1954) the overall importance of own labels was far exceeded by branded items.

Characteristics of own labels

One of the better definitions of own labels is that of Morris (1979) "Own label products are defined as consumer products produced by, or on behalf of distributors and sold under the distributor's own name or trademark through the distributor's own outlet".

Own labels have been a major strategic tool for multiple retailers over the past 20 years, both in their expansion programme (Mintel 1973) and in an attempt to increase store allegiance (Martell 1986). As a consequence the development of own labels has generally resulted in today's own labels being better quality products (eg Bullmore 1984) than those of 20 years ago. A broad statement about the quality of own labels relative to brands cannot be made since this varies by retailer (Themistocli and Associates 1984).

A general characteristic of retailers own labels is that specific own label products tend not to receive any advertising support, instead a corporate approach to advertising is adopted where general benefits associated with the retailers name are promoted. Individual own label items do not compete with brands on a proposition specific to that product field, rather they rely on the retailers broad advertising claims.

Own labels are generally 10-20% cheaper than the equivalent brands (Bond 1984). The price difference varies by product as well as by retailer (Themistocli and Associates 1984). A variety of reasons for retailers own labels being cheaper are reported by McGoldrick (1984), the main reason being that the dominant position of the large retailer enabled them to achieve terms based upon little more than the manufacturer's marginal cost. Mintel (1973) believe that other reasons for lower prices are reduced costs for the manufacturer, lower advertising costs which are often subsidised by branded manufacturers and lower distribution costs.

The rationale for own labels

The rationale for own label goods as a second tier in grocery retailing can be considered from the distributor's, the manufacturer's and the consumer's perspective.

E.I.U. (1968) noted that with the abolition of resale price maintenance, margins on brands fell as a result of price cutting, however here own labels provided retailers with some cushioning. They believe it was this new found profitability that was the prime reason for renewed interest in own labels. Euromonitor (1986) reported that margins on own labels are at least 5% more than on the equivalent branded item.

Own labels aid in the store image building process which several major retailers saw as then shifting customer loyalty

to their chain (Simmons and Meredith 1983). Retailers aim to position their own labels as good value for money (Martell 1986) and through this association with the store name, some retailers aimed for greater store loyalty. The reduced number of brands within a product field (Simmons and Meredith 1983) is a further benefit to the own label retailer now carrying a more rationalised range.

Researchers (eg Cook and Schutte 1967; Morris 1979; Euromonitor 1986) have shown that some of the main reasons for manufacturers of successful brands undertaking own label production are

- Economies of scale in raw material purchasing, distribution and production can be achieved.
- Any excess capacity can be utilised.
- It may provide a base for expansion of the firm.

- Where the manufacturer has a major brand, the own label being produced enables the manufacturer to compete more effectively with smaller, less advertised brands.
- In some cases substantial sales can accrue with minimal promotional or selling costs.
- It may be the only way of dealing with some retailers (eg Marks and Spencer).

The presence of a second tier in grocery retailing is seen to be of benefit to consumers, eg lower prices. With the increased confidence consumers have in retailers own labels,

Morris (1979) believes that consumers may prefer a lower priced product bearing a familiar retailer's name than an unfamiliar minor brand because of a perceived sense of guarantee associated with the own label.

Generics - The advent of a third tier in grocery retailing

In April 1976 Carrefour in France launched a line of 50 "produits libres" promoted as brand free products which signalled the advent of a further tier in grocery retailing (Hawes 1982). This new tier is one of many examples of generics which have been launched throughout the Western World (eg Sheath and McGoldrick 1981). The Nielsen (1982) description of a generic in the UK provides a full exposition of the concept: "Generic labelled products are distinguishable by their basic and plain packaging. Primary emphasis is given to the contents rather than a distinguishing brand or retail chain name. Fine print, usually at the bottom or on the back of the pack, identifies the distributor, and gives any legally required information".

The term "generic" may be a misnomer since it implies a return to the days when retailers sold commodities rather than brands. UK retailers with a generic range have developed a policy regarding the product, pricing, packaging, and merchandising that clearly enables consumers to associate a particular generic range with a particular store, (eg Allan 1981).

The quality of generics varies by retailer, however as Churchill (1982) observed they are often of a quality level inferior to that of branded goods.

The term generic implies no promotional support to differentiate the range, yet generics tended to be given some promotional support on launch (Sheath and McGoldrick 1981).

A Nielsen (1982) survey showed that on average generics in the UK are priced 40% below the brand leader and approximately 20% lower than the equivalent own labels. When considering how these low prices had been achieved, Euromonitor (1986) concluded that the plainer packaging generally resulted in minimal savings. Other savings came from reduced product quality, accepting lower margins, more flexible approach to product sourcing, minimal promotional support, innovative approach to packaging, one pack size only and more aggressive negotiation (Shircore 1983; Burck 1979; McEnally 1980).

Some UK multiple retailers from 1984 onwards have withdrawn their generics for reasons such as concern about the down market image they might provoke or desire to reposition their own label range.

Thus by the mid 1980's competition from own labels and generics in the packaged groceries market meant that brands were under more pressure than in the early 1960's. By next considering how the balance of power shifted from the manufacturer to the retailer, greater insight into the

increasing pressure on branded groceries is available.

The era of retailer dominance

During the 1950's building controls were relaxed, rationing lifted, grocery sales increased and the early trial of self service proved successful (Fulop 1964). New management in the multiples during the 1960's began to realise the profit opportunities of economies of scale, (King 1970) and the balance of power began to swing to the multiple retailer who opened more new stores and took over competitors.

The abolition of resale price maintenance in 1964 further increased the power of the retailer (O'Reilly 1972). No longer were independent retailers able to compete with multiple retailers on the price of branded goods and the trend towards a smaller number of retailers controlling a larger proportion of packaged grocery sales increased. In 1959 multiple grocery retailers accounted for 25% of grocery turnover, while by 1969 this sector which accounted for 10% of the total number of grocery outlets had increased its share of grocery turnover to 41% (O'Reilly 1972). Further evidence of the increasing concentration of buying power during the 1960's comes from a Nielsen estimate that in 1960, 80% of the grocery market was controlled by 1621 buying points, yet by 1970, 647 buying points controlled 80% of the grocery market (E.I.U. 1971).

Thus by the end of the 1960's the balance of power had swung from the branded goods manufacturer to the multiple retailer. The power of the multiple retailer has continued to increase, aided by the price advantage they offer consumers and their greater efficiency achieved through closing smaller outlets and developing larger stores (Monopolies and Mergers Commission 1981). Table 2 shows that between 1971 and 1983 the total number of grocery outlets fell by 47.5%. During this period the number of multiple grocery outlets fell by 6,408 to 4,565 and yet this sector, which accounted for 8.3% of all grocery outlets, increased its share of the packaged grocery market from 44.3% to 66.8% (Mintel 1985/86).

INSERT TABLE 1 ABOUT HERE

The impact of retailer dominance

The impact of the balance of power resting with multiple retailers can now be evaluated.

(i) The increasing importance of own labels

From the 1970's onwards more resources were put behind own labels (as will be shown later). Consumer confidence increased to the extent that while in 1965 own labels' share of packaged groceries was approximately 10% (Martell 1986), by 1985 they accounted for 26% of packaged grocery sales and generics for a further 2% (Euromonitor 1986).

(ii) Changed approach to advertising

In the early 1970's, O'Reilly (1972) reported reduced media support for brands in an attempt to maintain brand contributions after giving bigger discounts to retailers. King (1970) pointed out the fallacy of regarding special discounts to retailers as marketing expenditure, however it became increasingly common during the 1970's for manufacturers to cut back on brand advertising, while funding retailers growing advertising (Mintel 1984; Risley 1979; Wolfe 1981).

Thompson-Noel (1981) reported that advertising support behind the top 50 grocery brand leaders had fallen in real terms to the extent that media spend in 1979 was 64% lower than that in 1970, while by 1979 advertising spend by the top 6 grocery retailers was virtually 40% higher than that of 1970.

In the 1970's grocery retailers used advertising primarily to inform people of low prices (Wolfe 1981). Towards the end of the 1970's retailers started to promote an identity for themselves as a retail environment with a package of features (Davies, Gilligan and Sutton 1985; Granger 1984). As a result of the changed balance of advertising the personality of some brands have weakened, while a personality for own labels has been developed (King 1985).

(iii) The changing quality of own labels and brands

Increasing concern with profitability and growing retailer concentration led some manufacturers to relax brand quality specifications during the 1970's. (Monopolies and Mergers Commission 1981). No quantification of the extent of this exists, however King (1980) alludes to this as being relatively common.

Retailers concern with the quality of own labels has led them to become more quality conscious, reducing the quality difference that once existed in certain product fields between brands and own labels, (Themistocli & Associates 1984; Livesey and Lennon 1978). Major grocery multiple retailers now also have quality control laboratories and test kitchens.

(iv) The price differential between brands and own labels

There are instances where brands have been priced at a level unusually close to own labels deliberately to match the competitive edge of own labels (Risley 1981). McGoldrick (1984) believes that the price differential between brands and own labels has narrowed in the 12 years since 1970 due to the frequent promotions, cost reductions and retail discounts on brands, while own labels have traded-up from their position.

(v) The pressure for distribution

With the expansion programme of the multiple grocery retailers effectively ensuring a wider presence of multiples throughout Britain (eg Asda moving South while Sainsbury are opening new outlets in the North) and with the multiples accounting for two-thirds of packaged grocery sales, it could be argued that own labels now have as wide a geographical distribution as do brands.

(vi) The increasing similarity of brands and own labels

In the 1960's branded and own label groceries would have been perceived by consumers as 2 distinct tiers. As a result of retailer dominance, the previous section has shown that the marketing mix of some brands and own labels is now more similar and consumers might now be less likely to perceive a clear branded and a clear own label sector. Furthermore because generics are of a lower quality and lower price than own labels the following hypothesis was advanced:

Ho: Householders do not perceive the structure of all packaged grocery markets in the 3 tiers manner constantly assumed by marketers (ie branded, own label, generic).

Consumer research was undertaken to test this hypothesis as will now be considered.

Markets investigated

Six product fields were selected where in each market there were at least 3 branded, at least 3 own label and at least 2 generics. These were bleach, toilet paper, washing up liquid, aluminium foil, disinfectant and kitchen towel. The research was undertaken in Hertford (population 21,500) and examples of products were used from retailers local to this area ie Sainsbury, Tesco, International, Presto and Fine Fare. For each market householders saw a photograph showing 3 branded, 3 own label and either 2 or 3 generics for that market. In each product field similar pack sizes were sought.

Developing Image-Attribute Batteries

To obtain consumer relevant image-attribute statements which respondents could use to assess the competitive offerings, statements from Kelly Grid tests were used in conjunction with other statements derived from advertisement claims. For each product field, 15 different householders in the Hertfordshire area were interviewed and through the use of triads, relevant statements were elicited. In excess of 100 statements resulted for each product field which, while illuminating, would present problems for later large sample quantification.

To reduce the number of statements the more frequently made comments were considered. On average 25 statements per product field resulted and 6 new image-attribute batteries

were produced. Approximately 15 further interviews per product field were then undertaken with different householders who were asked to state, using a 5 point scale, how much they agreed or disagreed with each statement describing each of the branded, own label and generic examples on display. From the aggregated agreement-disagreement score matrices in each product field, 6 correlation matrices based on the statements were obtained. By inspecting these correlation matrices and then using principal component analysis, reduced lists of statements were obtained. For the 6 products, batteries of between 8-10 statements were obtained that portrayed the majority of information.

Postal survey

Questionnaires were designed and piloted for the 6 markets. Using a systematic sampling procedure 2,196 householders in Hertford were selected using the February 1985 Electoral Register. Preference was given to selecting the female in the household. One of the 6 questionnaires was sent to each person along with a 15cmx10cm photograph showing the 8 or 9 competitive offerings relevant to the specific questionnaire. A covering letter explaining the purpose of the study was enclosed as was a Business Reply Paid envelope. Each envelope was handwritten and a handwritten salutation used on each covering letter which was personally signed. A second class stamp was stuck to each envelope.

Questionnaires were received during August and September 1985. With the use of a reminder letter 1065 questionnaires were returned, a response rate of 48%. Ninety percent of the replies were from women.

The use of cluster analysis

Attention was focused on those 829 respondents who had correctly completed the appropriate image-attribute battery. Each of the 6 product fields were analysed separately. Respondents agreement-disagreement scores were standardised and then each converted to a squared Euclidean distance matrix. For each product field an average squared distance matrix was calculated.

These matrices were then ready for cluster analysis. An agglomerative hierarchical technique was selected because of the ability to see the evolution of clusters and also because of the popularity of this general class of cluster analysis (Everitt 1979). The single linkage algorithm was implemented using the CLUSTAN suite of programs.

Discussion of results

For each of the 6 product fields dendrograms were obtained showing the way respondents formed a hierarchical perception of the competitive structure in each market. Table 2 provides a summary of the clustering schema showing respondents perceptions of the 3 tier and 2 tier market

structures.

INSERT TABLE 2 ABOUT HERE

In only the washing up liquid test do respondents form a perception in the manner that Ho predicts. Working up the clustering schema respondents perceive a pure branded cluster then a pure own label cluster followed by a pure generic cluster. In the other 5 product fields the evolutionary process does not follow a consistent pattern and as can be seen from table 2, the composition of the 3 clusters in these markets does not conform to the branded, own label, generic picture expected from Ho. Thus Ho is refuted.

When considering respondents' perceptions of a 3 tier market, the branded products never merge with any of the own labels or generics. Examination of the 2 tiers respondents perceive shows that across all 6 product fields perception is always that of branded products as one cluster and retailer labels (ie own labels plus generics) as the other cluster.

Validity of results

One method for testing the validity of results is to randomly split the samples in each of the 6 product fields into 2 halves and see whether similar results occur (Everitt 1979; Cormack 1971). Examination of the dendrograms at the 2 cluster level for each product field showed that in 5 of the 6 product fields, regardless of which split half was examined, the same perception was recorded. At the 3 cluster level in

4 of the 6 product fields, again regardless of which split half was examined the same perception occurred. The similarity of each pair of dendrograms resulting from the split half pairs was also assessed using the cophenetic correlation coefficient (Sokal and Sneath 1963). This never fell below 0.94 indicating similarity of perception. Thus there is evidence of stability of cluster types.

Conclusions

These findings indicate that across the 6 markets investigated consumers generally perceive the competitive structure of markets at the 3 tier level in a manner different to that of the marketer. Rarely was there a situation where consumers perceived a clear branded, clear own label and clear generic segment.

Branded products are recognised as an entity distinct from own labels and generics. Years of branding by major manufacturers have set brands on a pedestal away from own labels and generics. Branded manufacturers need not think that because of retailer pressure they no longer have an asset in their brand, however continual neglect of investment in their brands could over a longer time span weaken the identity of a brand.

Generics would appear to be perceived as more similar to own labels, than as a distinct category. To some extent this can

be explained by the fact that the generics investigated do not conform to the expectation of a true "generic", ie a commodity bearing no associations with a particular supplier or outlet. Generics in the UK have been packaged in a more basic form, but with a livery that the consumer associates with a particular store. This cheaper, poorer quality image of generics may be detrimental to the image desired by the retailer through the similarity consumers perceive between generics and own labels.

Retailers marketing of the own label ranges investigated has not yet reached the point where they have moved sufficiently "up-market" to be considered in a similar manner to branded groceries. Continued support behind own labels is required if retailers wish to narrow the gap between themselves and brands.

In an era of increased retailer dominance, this research would confirm the view of the Henley Centre for Forecasting (1982) that "it still seems somewhat premature to proclaim the funeral rites for the brand" (p306). Further research is being directed at understanding whether perception of market structure is influenced by either consumers' perceptions of marketing activity or by consumers personal characteristics.

| | Number of shops | | Share of packaged grocery sales | |
|--------------|-----------------|--------------|------------------------------------|------------------|
| | <u>1971</u> | <u>1983</u> | <u>1971</u> % | <u>1983</u> % |
| Independents | 86,565 | 47,069 | 42.5 | 20.6 |
| Co-ops | 7,745 | 3,599 | 13.2 | 12.6 |
| Multiples | <u>10,973</u> | <u>4,565</u> | <u>44.3</u> | <u>66.8</u> |
| | 105,283 | 55,233 | 100.0 | 100.0 |

Table 1: UK grocery trade (Mintel 1985/86)

| <u>Product</u> | <u>Number of Clusters</u> | <u>Cluster Composition</u> |
|-------------------|---------------------------|----------------------------|
| Washing Up Liquid | 3 | (3B) (3OL) (3G) |
| | 2 | (3B) (3OL+3G) |
| Toilet Paper | 3 | (3B) (2OL+3G) (1OL) |
| | 2 | (3B) (3OL+3G) |
| Bleach | 3 | (3B) (3OL+1G) (1G) |
| | 2 | (3B) (3OL+2G) |
| Disinfectant | 3 | (3B) (3OL+1G) (1G) |
| | 2 | (3B) (3OL+2G) |
| Kitchen Towel | 3 | (2B) (1B) (3OL+3G) |
| | 2 | (3B) (3OL+3G) |
| Aluminium Foil | 3 | (3B) (2OL) (3G+1OL) |
| | 2 | (3B) (3OL+3G) |

B = Branded product

OL = Own Label product

G = Generic product

Table 2: Clustering at the 3 and 2 tier level.

Allan, J. (1981), Why Fine Fare believes in private label? Paper presented at Oyez Seminar: Is the brand under pressure again. London, September 1981.

Allison, Ralph I. and Kenneth P. Uhl (1964), Influence of Beer Brand Identification on Taste Perception, Journal of Marketing Research, 1 (August), 36-39.

Arnold, D.R., L.M. Capella, and G.D. Smith (1983), Strategic Retail Management, Reading, Massachusetts: Addison-Wesley Publishing Co.

Bond, Catherine (1984), Own labels vs the brands, Marketing, 8 March, 24-26.

Broadbent, Simon (1979), What makes a top brand? The Nielsen Researcher, 3, 1-13.

Bullmore, Jeremy (1984), The Brand and Its Image re-visited. International Journal of Advertising, 3, 235-238.

Burck, Charles (1979), Plain labels challenge the supermarket establishment, Fortune 26, March, 70-75.

Churchill, D. (1982), Generic: the latest name of the game, Financial Times, 28 October, 12.

Cook, V.J. and T.F. Schutte (1967), Brand Policy Determination, Boston: Allyn and Bacon.

Cormack, R. (1971), A review of classification, Journal of the Royal Statistical Society Series A, 134 (3), 321-367.

Cravens, D.W. and R.B. Woodruff (1986), Marketing, Reading, Massachusetts: Addison-Wesley Publishing Co.

Davies, Kerri, Colin Gilligan and Clive Sutton (1985), Structural changes in grocery retailing: The implications for competition, International Journal of Physical Distribution & Materials Management, 15 (2), 1-48.

Davies, Peter (1983), Brands failure: Why the retailers aren't to blame, Campaign, 24 June, 38-39.

E.I.U. (1968), Own Brand Marketing, Retail Business, 128 (October), 12-19.

-----, (1971), The development of own brands in the grocery market, Retail Business, 166 (December), 27-35.

Euromonitor (1986), Own Brands, London: Euromonitor.

Evans, J.R. and B. Berman (1982), Marketing, New York: Macmillan Publishing Co.

Everitt, Brian (1979), Unresolved problems in cluster analysis, Biometrics, 35 (March), 169-181.

Fulop, C.(1964), Competition for Consumers, London: Andre Deutsch.

Gardner, Burleigh B. and Sidney J. Levy (1955), The product and the brand, Harvard Business Review, 33 (March-April), 33-39.

Granger, Ray (1984), The changes in store for stores, Marketing Week, 25 May, 58.

Hancock, Geoffrey (1983), Exploiting the brand, ADMAP, 19 (November), 552-556.

Hawes, J.M. (1982), Retailing Strategies for Generic Grocery Products, Ann Arbor: UMI Research Press.

Henley Centre for Forecasting (1982), Manufacturing and retailing in the 80's: A zero sum game? Henley: Henley Centre for Forecasting.

Holstius, Karin and Mikael Paltschik (1983), Brand names and perceived value, European Research 11 (October), 151-156.

Jacoby Jacob and David Mazursky (1984), Linking brand and retailer images - Do the potential risks outweigh the potential benefits, Journal of Retailing, 60 (Summer), 105-122

Jarrett, C. (1981), The Cereal Market and Private Label. Paper presented at Oyez Seminar: Is the brand under pressure again. London, September 1981.

Jefferys, J.B. (1954), Retail Trading in Britain 1850-1950, Cambridge: University Press.

King, S. (1970), What is a brand?, London: J. Walter Thompson Company Ltd.

-----, (1978), Crisis in Branding, London: J. Walter Thompson Ltd.

King, Stephen (1980), Growth with brands, Retail & Distribution, Management, 8 (Sept/Oct), 21-25.

-----, (1984), Developing New Brands, London: J. Walter Thompson Ltd.

-----, (1985), Another turning point for brands?, ADMAP, 21 (October), 480-484, 519.

Kotler, P. (1984), Marketing Management: Analysis, Planning and Control, Englewood Cliffs: Prentice Hall.

Livesey, F. and P. Lennon (1978), Factors affecting consumers' choice between manufacturer brands and retailer own labels, European Journal of Marketing, 12 (2), 158-170.

Market Behaviour Ltd. (1985), Own Brands, London: Market Behaviour Ltd.

Martell, Deborah (1986), Own labels: problem child or infant prodigy, The Quarterly Review of Marketing 11 (Summer), 7-12.

McEnally, M. (1980), "An analysis of generic purchase behavior" Unpublished PhD thesis, University of Texas at Austin.

McGoldrick, Peter J. (1984), Grocery generics - an extension of the private label concept, European Journal of Marketing, 18 (1), 5-24.

Mintel (1973), Own labels, Market Intelligence Report, 12 (March), 4-15.

-----, (1984), Retail Advertising, Retail Intelligence, Summer, 63-90.

-----, (1985/86), Own Brands, Retail Intelligence, Winter, 109-143.

Monopolies and Mergers Commission (1981), Discounts to Retailer HC311, London: HMSO.

Morris, D. (1979), The strategy of own brands, European Journal of Marketing, 13 (2), 59-78.

Nielsen Researcher (1982), Generics - a first look, (1), 3-7.

O'Dochartaigh, A. (1974), Grocery own labels - a review, London: Institute of Practitioners in Advertising.

O'Reilly, A. (1972), The conservative consumer, Management Decision, 10 (2), 168-186.

✓ Ramsay, Bill (1983), Brand efficiency: lessons from the USA, ADMAP, 19 (Nov), 556-563.

Randall, Geoffrey (1985), The battle for brands, Management Today, November, 74-79.

Risley, George (1979), The brand franchise under attack, ADMAP, 15 (January), 25-26, 28-29.

-----, (1981), Learning to live with private label. Paper presented at Oyez Seminar: Is the brand under pressure again. London, September 1981.

Roselius, Ted (1971), Consumer rankings of risk reduction methods, Journal of Marketing, 35 (1), 56-61.

Sheath, K.J. and P.J. McGoldrick (1981), Generics. Their development in grocery retailing and reactions of consumers. University of Manchester Institute of Science and Technology.

Shircore, Ian (1983), Trying not to shed a tier, Marketing, 14 (4), 39-40.

Simmons, M. and B. Meredith (1983), Own label profile and purpose. Paper presented at The Institute of Grocery Distribution Conference. Brighton, September 1983.

Sokal, R. and P. Sneath (1963), Principles of Numerical Taxonomy, San Francisco: W.H. Freeman.

Themistocli & Associates (1984), The secret of the own brand, London: Thermistocli & Associates.

Thompson-Noel, Michael (1981), Big time grocery brands - the begining of the end?, Financial Times, 9 April, 11.

Whitaker, John (1983), To spend or not to spend?, The Nielsen Researcher, (2), 1-15.

Wolfe, Alan (1981), Brand and retailer advertising over the last decade. Paper presented at Oyez Seminar: Is the brand under pressure again. London, September 1981.