MARKETERS' AND CONSUMERS' CONCURRING PERCEPTIONS OF MARKET STRUCTURE

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ABSTRACT

The impact of increased retailer dominance is considered in terms of the positioning of weaker brands becoming similar to own labels. A review of the evolution and characteristics of brands, own labels and generics is presented. To assess consumers' perceptions of the competitive tiers 6 product fields were investigated. Consumers' perceptions of the structure of these markets rarely agreed with marketers. Brands were always perceived as dissimilar to retailer labels. Advertising changes did not influence perception since as an informational cue it was secondary to presence of brand name.

AUTOBIOGRAPHICAL NOTE

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INTRODUCTION

During the early 1980's when generic groceries were becoming more popular, marketing managers viewed the competitive stucture of markets in terms of brands versus own labels versus generics (Hawes, 1982) and developed marketing strategies accordingly. In view of the importance marketing places upon consumer orientation (Oliver, 1986) it is ironic that nothing has been published in the UK about how consumers (rather than marketers) perceive the competitive structure of grocery markets. A need for such knowledge has become more acute, particularly when considering the impact that the increasingly powerful multiple retailers have had on branded groceries, (eg Davies et al, 1985). Some manufacturers cut back on branding support to buy shelf space, while others were more hesitant and continued to support their brands through consumer directed programmes. King (1978) brought this "crisis in branding" to the attention of marketers which was heeded by some (Rapoport, 1985). The power of multiple retailers to influence the development of their retailer labels, as well as some manufacturers' brands, raises the question "how do consumers perceive the structure of markets?" Before being able to answer this question one first needs to understand the 3 tiers available in the UK during the early 1980's.

THE EMERGENCE AND CHARACTERISTICS OF SUCCESSFUL BRANDS

In the late 19th century manufacturers production was geared to the demands of the powerful wholesalers. With the rapid rise of urban growth and the widening of markets through improved transportation, opportunities for increased sales became apparent. However, the increased investment facing manufacturers for larger production facilities made some anxious about their reliance upon wholesalers. Consequently a few large manufacturers affixed a brand name to their product, advertised to consumers and appointed their own sales personnel to deal directly with larger retailers. No longer did consumers have to buy groceries which were blended by retailers and whose consistency could not be guaranteed. From around 1900 the era of manufacturer dominance was heralded (King, 1970) lasting through to the early 1960's (Watkins, 1986).

To ensure clarity of terminology a definition of what is meant by a brand is essential. Numerous definitions of brands exist (eg Copeland, 1923; Kotler, 1984; Jones, 1986) and a synthesis of the literature, in conjunction with Schutte's (1969) criteria for precision of terminology, leads to the following definition of a brand.

> A brand is an added value entity controlled by either a manufacturer or a packer, which portrays a unique and distinctive personality through the support of product development and promotional activity.

By not restricting this solely to manufacturers, this exposition also allows for the importer who packages and then markets brands (eg marketers in the fruit market)

Successful brands, are synonymous with consistent, high quality items (Livesey and Lennon, 1978) and offer consumers relevant added values reinforced through advertising. Branding does not solely differentiate competing items; one of its tasks is to provide the added value of personality. As Lamb (1979) so forcefully stated "It (branding) is providing a product with a personality which is so expressed as to encompass that product's uses, values, status, nature, function, stature, usefulness - everything" (p22). Thus when consumers purchase a product they acquire a functional entity; when they buy a brand they have both an emotional and functional entity. To communicate these added values and establish a positioning, advertising is necessary. Whitaker (1983) demonstrated that successful brands have a share of advertising expenditure in their product category which is in excess of their share of sales.

But advertising alone does not ensure a successful brand. Ramsay (1983) associated brand success with innovative product development, high quality, a clear positioning and continuity in marketing development. Clearly these activities involve costs and successful brands are priced at a premium.

It will be shown later in this paper that manufacturers have cut back on supporting many of these characteristics to cope with multiple retailers demands.

THE ARRIVAL OF OWN LABEL GROCERIES

The growth of multiple retailers paralleled the increasing presence of branded goods, however resale price maintenance restricted retailers ability to compete on price. To increase store traffic, retailers relied upon service and their own labels. In their early days, retailers usually produced and packaged own labels (Lennon, 1974), but with the need for a wider own label range, manufacturers were commissioned to produce own labels.

The definition of own labels which most aptly describes this category is that presented by 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". (p59)

By using the term "distributor" in this definition, Morris clearly includes multiple retailers' own labels (eg Tesco and Sainsbury) and alludes to both wholesalers' own labels (eg Nurdin and Peacock) and symbols' own labels (eg Spar).

Originally the quality of own labels was lower than that of equivalent brands. Unlike brands, they tend not to receive any advertising support but instead benefit from retailers' corporate advertising. Own labels are generally 10-20% cheaper than the equivalent brands, due in part to retailers' abilities to negotiate prices based upon little more than the manufacturers marginal costs (McGoldrick, 1984). During the past 10 years the

characteristics of own labels have changed, showing more similarity to brands, as will be considered later in this paper.

THE ADVENT OF A THIRD TIER - GENERICS

In response to consumer confusion about product prices and to alleviate some consumers' hostility towards paying a marketing surcharge for brands, Carrefour in France launched a line of 50 "produits libres" in 1976. This was the first of many examples of generics, ie groceries presented in basic packaging, from which any "frills" were removed. Generics were positioned to offer an adequate standard of quality. To refer to this tier as "generics" is incorrect, since as Allan (1981) observed, retailers in the UK stocking generics had a policy on pricing, quality, packaging and mechandising that enabled consumers to associate specific generic ranges with particular retailers.

International was the first retailer to launch a generic range in the UK (1977) followed by Carrefour (1978), Fine Fare (1980), Allied Suppliers (1981) and Tesco (1981). The quality of generics varied by retailer, but generally they were inferior to brands (Churchill, 1982). Generic prices were approximately 40% lower than brand leaders and 20% cheaper than own labels (Nielsen, 1982). Some advertising support was used on the launch of generics.

International had positioned their generics too close to their own labels and in 1984 were the first to withdraw from generics. Concern about the impact that generics might have upon their image along with other policy decisions meant that by January 1987 none of the multiples had generics. As will be shown later, these decisions to stop marketing generics were well founded since consumers perceived similarities between own labels and generics.

When this research was undertaken (1985) generics accounted for 2% of packaged grocery sales (Euromonitor, 1986) and with own labels they represented a threat to brands through demands on shelf space. To appreciate why consumers' perceptions of market structure might differ from marketers, the impact of an increasingly dominant multiple retailer sector needs to be addressed.

THE INCREASING POWER OF MULTIPLE RETAILERS

During the 1950's and 1960's the success of the supermarket concept, retailers' acquisition programmes, the abolition of resale price maintenance and more professional management, led to increasingly powerful multiple retailers. As evidence of this, multiple retailers' share of packaged grocery sales increased from 25% in 1959, to 41% by 1969 (O'Reilly, 1972). Further emphasis upon low prices and the greater efficiency of fewer but larger stores (Monopolies and Mergers Commission, 1981) resulted in multiple retailers (accounting for 8% of the number of grocery outlets in 1983) increasing their share of

packaged grocery sales to 67% by 1983 (Mintel, 1985/86). The impact of increased multiple retailer dominance has affected branded groceries in several ways:

(i) Increasing importance of own label.

Retailer support for own labels increased and as Hurst (1985) commented:

> "--- the pressure comes not so much from a low price, low quality own-brand product as from an own-brand product formulated to be the equal of the brand, packaged in a distinctive house style, given equal or superior in-store positioning, and still despite all this, at a price advantage." (p396)

Euromonitor (1986) reported that own labels' share of packaged grocery sales grew from 20% in 1971 to 28% in 1985.

(ii) Changing use of advertising.

To provide larger discounts to multiple retailers some branded goods manufacturers cut advertising support in an attempt to maintain brand contributions (O'Reilly, 1972; Wolfe, 1981). Retailers used some of this revenue to fund their advertising and Mintel (1984) showed that retailers advertising, as a proportion of total advertising expenditure, grew from 10% in 1970 to 17% in 1982, while manufacturers' consumer advertising fell from 45% to 42% in the same period.

Retailers' advertising changed from stressing low prices to promoting an identity for themselves (Davies et al, 1985). Thus while retailers were developing a personality for their own labels, the personality of some brands would have weakened.

(iii) The narrowing price gap between brands and own labels. Instances were reported (McGoldrick, 1984) where the price differential between brands and own labels narrowed.

(iv) Quality similarities between brands and own labels. Curtailing R&D investment and cost reduction exercises on product ingredients enabled some manufacturers to respond to the financial pressures of multiple retailers (O'Reilly, 1980). At the same time retailers became more quality conscious, reducing the quality difference between brands and own labels (Simmons and Meredith, 1983).

(v) Distribution aspects.
It can be argued that own labels have become as widely available as brands following the expansion programmes of the multiple retailers. Some studies (eg Thermistocli & Associates, 1984) found multiple retailers were giving better shelf positionings for their own labels rather than the competing brands.

Thus from the marketing mix analysis of brands and own labels it could be possible for consumers to perceive brands and own labels as being similar. Another possibility is that because retailers did not enact the generic concept, but instead differentiated their generic ranges, consumers might perceive own labels as similar to generics. A study was subsequently designed to test the hypothesis:

Ho: People do not perceive the competitive structure of grocery markets in the same manner as marketers (ie pure brands vs pure own labels vs pure generics).

PRODUCT FIELDS TO BE EVALUATED

To provide a good test for the hypothesis, 6 product fields were sought. When selecting these product fields a secondary research objective was to assess any impact from brand manufacturers reducing or maintaining brand support. One measure of brand support is advertising activity, published by MEAL. While recognising the limitations of MEAL data (eg use of rate card) and making the assumption that campaigns of the same level of media support achieve the same level of impact, communication and memorability, it was felt that this could provide a guide to classifying product fields as reduced or maintained branding activity.

Annual advertising spend for each packaged grocery market reported by MEAL was analysed from 1972 to 1984 inclusive. In the bleach, toilet paper and washing up liquid product fields there had been a general trend of increased advertising support. By contrast advertising activity was generally in long term decline in the aluminium foil, household disinfectant and kitchen towels sectors. The 3 product fields showing evidence of advertising support all had media spends in 1984 in excess of £1.2m (at 1970 prices), compared with less than £0.16m for the 3 reduced advertising product fields.

For each product field 3 brands, 3 own labels and a minimum of 2 generic examples were bought from retailers serving the population of Hertford (where fieldwork was undertaken). Care was taken to ensure that similar pack sizes were selected, but apart from the washing up liquid and kitchen towels market this proved impossible. Own labels were obtained from Fine Fare, International (at the time of fieldwork not associated with Gateway), Sainsbury and Tesco, while generic examples from Fine Fare, Presto and Tesco were used.

MEASURING RESPONDENTS' PERCEPTIONS

To evaluate respondents' perceptions, image-attribute batteries were developed specifically for each product field and respondents were asked how much they agreed or disagreed with each statement describing each of the items on display in their product field. To obtain consumer relevant attributes Kelly Grid tests (Fransella and Bannister, 1977) were used in conjunction with other statements derived from advertisement claims. For each product field, a series of 15 householders in the Hertfordshire area were interviewed. In excess of 80 statements resulted for each product field and a further exercise was undertaken to reduce these to more acceptable lengths.

Within each product field, approximately 25 statements were frequently observed. These statements were viewed as being important evaluative attributes, but it was thought that there might still be some repetition between

these statements. Inspection of the correlations between attributes, in conjunction with principal component analysis is an ideal way of reducing the number of attributes. Consequently 6 image-attribute batteries were produced and for each product field 15 householders were asked to state how much they agreed or disagreed (5 point scale) with each statement describing each of the items on display. Undertaking this analysis for each product field resulted in 8 to 10 statements adequately portraying the majority of the information. Thus image-attribute batteries of a size unlikely to cause respondent fatigue and yet incorporating those attributes important to respondents had been developed to measure perception of market structure. These were subsequently completed by a large number of respondents using a postal survey.

Postal survey

Questionnaires were designed and piloted for the 6 product fields. Using a systematic sampling procedure 2,196 householders in Hertford were selected using the February 1985 Electoral Register. To reflect buying behaviour, preference was given to selecting the female in the household. One of the 6 questionnaires was sent to each person along with a 6 inch x 4 inch colour 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%.

Evaluating perceptual structures using cluster analysis

Attention was focused on those 829 respondents who had correctly completed the appropriate image-attribute battery. Several ways exist to assess how people perceptually group items into categories which exhibit internal cohesion eg cluster analysis, Q-type principal component analysis, multidimensional scaling and discriminant analysis. Cluster analysis appeared most appropriate for this research and to observe the order in which clusters had evolved, a hierarchical agglomerative method was selected. Recognising that the clustering algorithm selected defines what is meant by a cluster (Cormack, 1971) it was decided to use the single link algorithm.

Respondents' agreement-disagreement scores from the image-attribute batteries within each product field were first standardised and each converted to a squared Euclidean distance matrix. For each market the mean standardised squared Euclidean distance matrix was calculated which was then subjected to single link cluster analysis using the CLUSTAN computer package (Wishart, 1978).

The results of the cluster analysis were displayed on a dendrogram. This is a hierarchical clustering tree which shows for example at the bottom of the tree there are 9 unclustered items, at the next level moving up the tree there are 7 unclustered items with 2 items forming a shared cluster, etc. By examining each level of the dendrogram the way that clusters evolved could be seen.

ANALYSIS OF RESPONDENTS' PERCEPTIONS

Inspection of Table I shows how respondents perceived the competitive structure of each product field at the 3 cluster level. The null hypothesis predicts that the 3 clusters in each product field should be a pure branded cluster, a pure own label cluster and a pure generic cluster, yet for only the washing up liquid examples did people perceive the competitive structure in the same way as marketers. Across all 6 markets brands were always seen as being different to own labels and generics. A clear branded cluster virtually always appeared except in the kitchen towels market, but even here 2 of the clusters are different branded versions and again none of the brands merged with the own labels.

TABLE I HERE

Confirmation of brands being perceived as a category distinct from own labels and generics is seen when examining perception of market structure at the 2 cluster

level. As can be seen from Table II, in each of the 6 product fields respondents always grouped the branded items together as one cluster which was distinct from the second cluster consisting of own labels and generics.

TABLE II HERE

The findings at the 2 tier level are similar to those in the USA of Hawes and McEnally (1983) and Wilkes and Valencia (1985). It is my view that the main reason for the consistent composition of the clusters at the 2 tier level is due to the way generics display strong associations with specific retailers (eg multi-coloured packs, carrying brand name (BASICS), promotional support). When assessing competing items people place considerable emphasis upon brand name cues (Jacoby et al, 1977; Kendall and Fenwick, 1979). Consumers' cognitive capabilities are limited and by using the brand name as an informational cue, they are able to aggregate several "bits" of information into a "chunk" (Miller, 1956). With respondents placing importance upon brand name cues, retailers branding of generics resulted in them being perceived as similar to own labels.

Long term maintained or reduced advertising activity did not influence perception of market structure nor did the absolute level of media spend in each product field. These results conform to those of other researchers (eg Kiel and Layton, 1981) who found that advertising is not a prime informational cue when respondents evaluate

items.

RELIABILITY OF RESULTS

The reliability of results was tested by randomly dividing the samples in each of the 6 markets into 2 halves and seeing whether similar results occur in each half (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 markets, 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

A review has been presented showing that in a climate of increased multiple retailer dominance, some branded goods manufacturers cut back on branding activity to buy shelf space. An analysis of the marketing mix of weaker brands suggested the increased similarity of brands with own labels. Across the 6 markets investigated consumers generally perceived the competitive structure of markets at the 3 tier level in a manner different to that of marketers. Rarely was there a situation where consumers

perceived a clear branded, clear own label and clear generic segment.

Branded products were 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 brands. However continual neglect of investment in their brands could over a longer period weaken the identity of brands.

Generics were perceived as more similar to own labels rather than as a distinct category. To some extent this can be explained by the fact that the generics launched in the UK do not conform to the expectation of a true "generic". Generics have been packed in a livery that consumers associate with a particular store. This cheaper, poorer quality image of generics may be detrimental to the image desired by retailers because of the similarity consumers perceive between generics and own labels.

Own labels have not yet reached the point where they have moved sufficiently "up-market" to be considered as similar to branded groceries. Continued support behind own labels is required if retailers wish to narrow the gap between themselves and brands.

Advertising changes do not appear to have affected perception of the competitive structure of these markets. This does not imply the redundancy of advertising, but instead can be seen as further support for respondents placing greater reliance on other informational cues in a multicue environment.

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 marketing activity or by consumers' personal characteristics, or by the nature of the product (high or low involvement).

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Market	Sample Size	3 Cluster Composition
Maintained advertising activity		
Bleach	148	(3B)(3OL+1G)(1G)
Toilet Paper	129	(3B)(2OL+3G)(1OL)
Washing Up Liquid	144	(3B)(3OL)(3G)
Reduced advertising activity		
Aluminium Foil	135	(3B)(2OL)(1OL+3G)
Kitchen Towels	130	(2B)(1B)(3OL+3G)
Disinfectant	143	(3B)(3OL+1G)(1G)

B = Brand; OL = Own Label; G = Generic

Table I: Perceived market structure at the 3 tier level

Market	Sample Size	2 Cluster Composition
Maintained advertising activity		
Bleach	148	(3B)(3OL+2G)
Toilet Paper	129	(3B)(3OL+3G)
Washing Up Liquid	144	(3B)(3OL+3G)
Reduced advertising activity		
Aluminium Foil	135	(3B)(3OL+3G)
Kitchen Towels	130	(3B)(3OL+3G)
Disinfectant	143	(3B)(3OL+2G)

B = Brand; OL = Own Label; G = Generic

Table II: Perceived market structure at the 2 tier level