“Consumer behavior and brand preferences in organic grocery products. Store brands vs manufacturer brands”

AUTHORS	Miguel Llorens María Puelles Roberto Manzano

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Miguel Llorens (Spain), María Puelles (Spain), Roberto Manzano (Spain)

Consumer behavior and brand preferences in organic grocery products. Store brands vs manufacturer brands

Abstract

Organic food has become more popular in developed countries over the past ten years mainly due to consumers' food safety awareness and environmental problems. In Spain the market is still small, but store brands are driving growth in this category.

Final objectives of this work are to uncover the reasons for buying organic brands and existing barriers for not buying them, and also to obtain some insight into the reasons that may trigger positive or negative consumer attitudes towards organic food branding. As a second objective, the authors study consumer behavior patterns towards organic food products by comparing two different brand types, manufacturer brands and store brands, in order to evaluate brand relevance on consumer choice. The authors study potential consumer preferences between them, revealing brand equity and consumer trust.

It is generally accepted in the literature that the drivers for consumption of organic products may be either a "health concern" ("it is good for my health or my children's"), or a "feel good" factor ("it makes me feel better"), the latter being an adaptation of consumer behavior to their ethical values towards the environment and production sustainability.

Results from this work allow to understand that the distribution model of organic food has an impact on its price level, and the resulting premium price being one of the main barriers for buying these products. The price gap between organic and "standard" products, together with the merchandizing used at point of sale are two key factors to address when developing the category. The paper concludes that a collaborative sales strategy between manufacturers and distributors would help a distribution model change and foster consumption of this product category in Spain.

Keywords: organic products, store brands, brand relevance, consumer behavior.

Introduction

Consumers' increased knowledge about the relationship between diet and health, and their awareness of food quality features, as well as their access to information about new production and processing technologies have resulted in a constantly increasing demand for improved quality foods, being organic food within this trend.

In spite of that, according to MARM (2010) report, the main expenditure on organic products in Spain is mainly made on few product categories, like vegetables, fruit, eggs, and olive oil. The average expenditure per capita on organic food in Spain is very low, with 5.6 euros per year, while in Europe it is 24.54 euros. This represents 1.9% of total food expenditure, with significant differences in consumption depending on certain variables such as population size, social class and household life cycle.

The aim of this work is to contribute to the management and growth of the organic products within the grocery chains. We exposed the respondents to a series of issues based on literature revision and previous work to better understand the purchasing drivers within this product category and establish some pattern of behavior.

Directly linked to the previous, second objective would be to establish the role of store brands in the development of organic food category in order to assess their potential. We study potential consumer preferences either for store brands or manufacturer brands, revealing brand equity and consumer trust.

As a result, we obtain some insights into the reasons that may trigger positive or negative consumer attitudes towards organic food branding.

1. Literature review and conceptual framework

Several academic studies analyze the behavior of organic food consumers, and some company reports focus on them due to their market potential. Many authors (Kaiser and Wilson, 2000; Laroche, Bergeron and Barbaro-Forleo, 2001; Brugarolas and Rivera, 2002; Fraj & Martínez, 2004) focus their research on studying which variables uncover a better understanding of the main drivers of consumption of these products for a segment of consumers.

Literature reveals different approaches to the issue of predicting consumer ecological shopping behavior based on consumer segmentation. Some authors focus their research on the study of demographic and socio-economical variables (Vining and Ebreo, 1990; Fraj and Martinez, 2003; Vega et al., 2007), being age, social class, housing type, gender, level of studies, profession and level of income the most widely used. The revision of literature gives contradictory results therefore the findings are inconclusive regarding the influence of socio-demographic and economic variables in consumer ecologic shopping behavior.

Psychographic variables (Granzin and Olsen, 1991; and Ramanaiah et al. 2000) and the level of consumer

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knowledge about environmental issues (Ramsey and Rickson, 1976; and Grunert and Kristensen, 1992) are also considered. Finally some authors focus their research on a combination of psychographic and knowledge criteria for segmenting (Fraj and Martinez, 2007). Our work follows the latter line of research.

Literature reveals a number of research papers that attempt to examine consumer perceptions towards organic food in order to identify the psychologically-based, personal values-related motives of high quality food purchasing. Research carried out seems to focus on two main reasons for buying organic food, either a "health concern" ("it is good for my health or my children's"), or a "feel good" factor ("it makes me feel better"), the latter being an adaptation of consumer behavior to their ethical values towards the environment and production sustainability. Krystallis and Ness (2004) found that "high quality," "healthiness/safety", "tastiness", "convenience" and "ethical consciousness" were the main motivational areas behind the selection of quality food. Makatouni (2002) indicates that factors regarding the health of a subject or its family are the most important motives in choosing organic food. According to his findings values regarding environment and animal welfare are of secondary importance. Baker et al. (2004) found that the values concerned with health, well-being and the enjoyment of life dominate consumers' motivation for purchasing organic products. In addition Zanoli and Naspetti (2002) support that all consumers associate organic products with health at different levels of abstraction and want good, tasty and nourishing products, because pleasure and well-being are their most important values.

Research carried out by Mintel (2009) shows consumers are ready to pay a premium price for products believed to be more "enviromentally friendly", but only "a bit more", indicating that the price is an strong barrier when buying organic food. Other authors such as Laroche, Bergeron y Barbaro-Forleo (2001) coincide with this view.

According to Vicente et al. (2007) and Puelles, Briz & Labajo (2008), store branded organic products are significantly more expensive than conventional store branded products, but in all cases their price is lower than that of organic products under manufacturer brands by about 15%-20%. In an economic downturn the relatively lower price of store brands may maintain demand for this product category.

There is still little scientific research about the role of store brands in the development of the organic food category. In order to assess the importance of the distribution model on the organic food category growth, some experts (Schmid, Fontguyon & Sans, 2007) believe that the large international food distribution retailers hold the key to the future of the organic food market. The current market structure for organic products in Spain, where 70% of the product is sold directly from producers to specialist shops, away from mainstream stores, is seen as a liability for the growth of these products (e.g., Picazos, 2002; Sánchez et al., 2001; Schmid et al., 2007). This is considered as one of the main reasons for having an underdeveloped internal market. Dupupet, Valor and Labajo (2010) identify the big retail groups as the most suited for increasing organic food sales in Spain, including the proper management of their store brands as a key tool for this purpose.

Bearing the above in mind our work aims to establish the role that can be played by store brands as a tool in the hands of retailers to develop the organic food category. We treat organic food products as a supra-category which encompasses different food categories.

Product listing and accessibility of products in store become the most important factors contributing to an increase in demand. We conclude that a collaborative sales strategy for manufacturers and distributors would foster consumption of this product category in Spain. Merchandising at point of sale and the price gap between organic and "standard" products are two key factors to address when developing the category.

2. Discussion and hypotheses

This work aims to contribute to the improvement of the management, knowledge and growth of the organic products as a category within grocery chains. A better understanding of the organic foods category within food retail companies, and the role of branding will foster the development of the category.

We found significant evidence in literature and industry reports indicating the importance of price on consumer behavior towards organic products, as discussed in the literature revision. However our research leads us to believe that brand availability is an even more relevant barrier for consumption than price. Store brands may have a stimulating effect on demand, both narrowing the price gap between organic products and conventional ones (non-organic), as well as making the products available to a wider range of potential consumers listing them in mainstream channels.

Some key drivers and barriers have been identified in previous studies in Spain. Fuentes and Lopez de Coca (2008) found that 64.1% of Spaniards had bought or buy organic food. The main reasons for buying these products are, in order of importance, health, taste, and environmental concerns.

There is mounting evidence in literature regarding the higher price as a barrier of consumption of or-

ganic products. In Spain the higher price is partly due to the distribution model, generally produced by small manufacturers and distributed through small speciality shops. The retail sales split by channel (Table 1) in Spain shows a very different trade scenario compared to other European countries. Most of sales in Spain (75%) are carried out at specialty shops, a much higher percentage than in the rest of the countries, where the Hyper and Supermarket Channel are far more important.

Table 1. Organic food retail sales split by channel

	Hyper/Super	Specialty shops	Others
Sweden	90	1	10
UK	75	12	12
Germany	49	28	23
France	39	37	24
Spain	20	75	5

Source: BioFach (2009).

There seems to be a vicious circle which keeps organic food category from further development in Spain. According to the MARM (2009) study, the distribution model is a constraint for the development of the organic food market. Small producers and alternative distribution makes the category less available for consumers and more expensive, resulting in a lower demand. Without economies of scale the products becomes more expensive to produce.

In order to contrast the importance of availability in the Spanish organic food market we try to establish the key barriers and the main drivers for consumption. We challenge the role of store brands in the development of the organic food category as a driver for opening up mainstream channels to the category and making the products more available at a more competitive price.

The hypotheses are the following:

H1: The main barriers for consumption of organic grocery products are the difficulty to access the products and their higher price.

H2: The main driver of organic food consumption is related to "health concerns".

H3: Buyers of organic products are less sensitive to price than non buyers.

H4: When buying organic products consumers trust manufacturer brands more than store brands.

3. Methodology

We have developed a quantitative research survey, using personal interviews to shoppers with the following characteristics.

The questionnaire was specifically designed to detect key factors for decision-making, using scientifically validated scales to collect this information. The interviews took place at the exit point of the supermarkets, after payment at the cash desk.

The universe consisted of shoppers, men and women, over 18 years old, residing in the Madrid area who shop regularly at stores belonging to the main retail groups in Spain.

The sample comprised 350 respondents, 10 interviews were considered not valid, so the final sample comprised 340 respondents. The sampling method was random, although a correcting system was applied to avoid bias to the structure of the final sample, applying predefined quotas for the variables – sex and age. The sampling error for global data is ± 5.4%, for a confidence interval 95.5% and $P = Q = 50$.

Data was collected in the field during February 2009 by personal interview at the exit of the supermarkets. A total of four interviewers were used, a supervisor and a field coordinator, all of whom had previous similar experience. All the open or mixed questions in the questionnaire were coded by applying a code guideline manual designed ad-hoc for this work. All the valid questionnaires (340) were recorded on specialized software for questionnaire management (Gandia Barbwin). The resulting data file underwent some controls to verify the correct recording.

4. Results, figures and tables

The results that identify the main drivers for buying and barriers for "not buying" organic products are shown in Table 2. These reinforce some results of previous studies mentioned above.

According to survey results, one in three (34%) of "non buyers" of organic products say that the main reason for not buying organic products is that they are not easy to find in the supermarket. In a similar percentage 33.9% of "non buyers" of organic products say that their reason for "not buying" is that these products have a higher price as compared to the standard (non-organic) products. This would support Hypothesis 1.

The main reason for buying these products is that "they are healthier", followed by "higher quality" and "environmental awareness". These results allow validation of Hypothesis 2, although there is a significant difference regarding the importance given to the environmental issues by consumers in our research compared to MARM (2008) data (Ministerio de Medio Ambiente y Medio Rural y Marino). A possible explanation may be that our work has focused on shoppers (buyers), while MARM report was based on consumers.

Table 2. Comparative results between this work and MARM research on reasons for buying or not buying organic products.

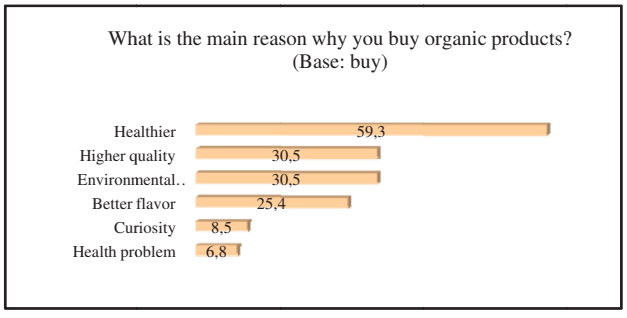
		MARM 2008 (consumption)	Llorens, Puelles and Manzano 2009 (buying)
Consumes/buys organic products		64.1 (57.1[1])	34,7
Reasons for consumption/buying	Healthier	68.1	59.3
	Higher quality	26.9	30.5
	Better flavor	23.9	25.4
	Environmental awareness	7.0	30.5
	Curiosity	8.8	8.5
	Self-grown	3.3	-
	Health problems	-	6.8
Barriers for consumption/buying	Lack of knowledge	28.8	11.9
	Higher price	25.1	33.9
	Cannot be found easily	21.3	34.0
	Cannot see advantages against non organic products	14.8	-
	Do not trust	10.9	14.7
	Lack of habit, not thought about it	7.2	28.4
	Not interested	1.2	22.9

Source: Authors with data from MARM (2008). "Observatorio del Consumo y distribución agroalimentaria" and authors' research.

The second main driver for buying is "quality", which is the main reason for buying organic products for 30.5% of shoppers of this type of products. Furthermore, the principal reason for buying them ("they are healthier"), has a strong correlation with the "quality" concept of the current buyers.

When comparing the results of this survey with the MARM research, we can observe a shift in the importance given to some items due to the different terminology used. The most outstanding difference is regarding "environmental awareness", with a clear gap between both studies. This may be due to the composition of the sample, as the MARM study is nationwide and our work was confined to Madrid region. Also the questions in the MARM work are related to consumption, while our work relates to shopping for home consumption, excluding online trade.

The main reasons for buying organic products are illustrated on Figure 1.



Source: Authors.

Fig. 1. Reasons for buying organic products

[1] Data only for Comunidad de Madrid.

The latter statement is complemented with the different price sensitivity between the segments of "buyers" and "non buyers" of organic products, as reflected in Table 3. Whilst 54.2% of organic product buyers would be prepared to pay a price premium of 20% for consuming this type of product, only 18.9% of "non buyers" would consider incurring the extra cost. Even a relevant 16.9% of "organic buyers" would consider paying a price premium of up to 30%, against 2.1% of "non-organic buyers" who would do so. This clear difference reinforces Hypothesis 3.

Table 3. Cross data of "has bought organic products" by "how much more would you pay for an organic product?" (% verticals)

		Yes	No
Base:	350	121	229
More than 30% over the price of a standard product	2.5	3.4	2.1
Up to 30% over the price of a standard product	7.6	16.9	2.1
Up to 20% over the price of a standard product	32.5	54.2	18.9
Up to 10% over the price of a standard product	49.0	55.9	44.2
No more/the same price as a standard product	58.0	50.8	62.1

Notes: χ^2: chi square; d.f.: degrees of freedom; sig.: significance; $\chi^2 = 25.76$; d.f. = 8; sig.: 0.000.
Source: Authors.

The lower price sensitivity of demand regarding price by the buyers of organic products is based on the fact that they consider organic products "healthier" (59.3%), as well as of "higher quality" (30.5%).

We also conclude how a different consumer brand perception leads consumers to have a stronger preference for manufacturer brands as opposed to store brands, as shown in Table 4.

The results regarding buyers' confidence in brands leads us to accept Hypothesis 4. Almost one in two shoppers (48.8%) state that manufacturer brands are more reliable for organic products than store brands; although a relevant 40.6% states that they are indifferent regarding either brand type, as we shown in Table 4.

Nevertheless, even with the observed preference for manufacturer brands, it is interesting to see in Table 4, that the actual "organic buyer" is more inclined to buy store brands (15.3%) than the "non-organic buyers" (1.9%).

Table 4: Cross data between "has bought organic products?" and "Preference for manufacturer brands or store brands" (% verticals)

		Yes	No
Base:	350	121	229
Manufacturer brand	48.8	45.8	49.1
Store brand	6.5	15.3	1.9
Indifferent	40.6	33.9	45.4
Do not know	4.1	5.1	3.7

Notes: χ^2: chi square; d.f.: degrees of freedom; sig.: significance; $\chi^2 = 16.69$; d.f. = 6; sig.: 0.010.
Source: Authors.

We validate all four hypotheses and offer some clear insights into consumer behavior towards organic food which we will detail in the following conclusions.

Conclusions

Some findings of this research uncover certain patterns that may help to implement a sales strategy to foster consumption of organic food in the Spanish market. We believe this strategy should be developed jointly by brand manufacturers and retailers adopting a "category management" collaborative approach.

A very relevant conclusion is that merchandising of these products at the point of sale must be improved in order to increase sales, as buyers do not identify organic products easily in the store nor are they "top of mind" when shopping. They are rarely on the shopping list. These two elements combined limit sales, therefore we conclude that improved in-store merchandising would make these products more accesible at the point of sale (easier to locate) and may lead to an increase in sales.

We have introduced the store brands as key players which may help to overcome another of the main barriers for buying organic products, namely the price differential beetween organic and standard products. Store brands make organic products more affordable for those buyers who are more price sensitive, enabling more choice. This may enable store brands to become key players in the development of this category.

A more important role of retail grocery chains using their store brands would help to overcome the constraints created by the current distribution structure of organic food in Spain, discussed in the "discussion and hypotheses" section of this work.

Another significant conclusion of this work is that we highlight that the main driver for consumption is "self-centered", relating to personal health, and that environmental awareness (an altruistic factor) is a lesser motivation. This fact has some business implications, indicating to manufacturers as well as distributors where their brand communication message should be focusing.

We have also demonstrated that manufacturer brands are more trusted by shoppers when buying organic products, although current organic buyers show less inclination to do so comparatively.

Regarding the use of store brands as a means of increasing sales of organic products, we believe our conclusions above indicate that retailers have an opportunity to develop the category improving the mentioned variables (communication, merchandising and price differential) under their management.

International and management implications

In this research we treat organic grocery products as a supra-category in order to have a comprehensive view of the issue, and explore the reasons why a collaborative effort should be developed between retailer and manufacturer under a "category management" approach, which would improve the value proposal for the customer and foster the joint development of the category. This is an innovative approach from an academic as well as a management stance.

This work tries to define customers' behavior towards organic food products and focus on the drivers for consumption as well as the barriers. We also study the role of store brands within a collaborative environment in the distribution channel focusing on the category management approach.

In terms of shopper motivation for store choice we find that organic products by themselves are not attractive enough to drive people into the store. This means that retailer's communication should not be based on this category as it is not relevant enough in the shopping trolley, but a marginal complement to the mainstream shopping list. This conclusion may have business implications limiting the efforts of retailers when developing the organic product category.

We have found that manufacturer brands are more trusted by shoppers when buying organic products. This may have implications for category definition by retailers, allowing more presence of manufac-

turer brands than their own offer, although another alternative for retailers would be to focus their consumer communication on the quality of their organic store brands. If they achieve this objective, together with maintaining a very relevant price differential with manufacturer organic brands, we believe they may achieve a significant sales increase for the category as a whole. We also found that current organic buyers are more inclined to buy store brands than non buyers of organic food.

Limitations and future research

We consider that a likely limitation of this work is that field work took place within the context of an economic crisis, both within Spain and worldwide. This has definitively had an effect on private consumption, since price is an important barrier towards buying these products and the crisis has diminished the disposable income. The economic downturn may have biased results increasing price concerns and the search for alternative cheaper options.

We would like to study the evolution in time of buyers' attitude towards these products, and to compare variations over time of the environmental awareness of the Spanish shopper, which we envisage will grow in line with the evolution pattern in other countries where this product category is more developed such as Germany, the UK or the USA. Finally we consider it will be of great value to be able to compare results in Spain with those of other countries.

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