Positioning of Spanish Retailers.

Perception of high frequency versus low frequency consumers.

El posicionamiento de los distribuidores españoles.

Percepciones de los consumidores de alta frecuencia versus consumidores de baja frecuencia.

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ABSTRACT

In today's highly competitive marketing environment, the positioning decision of retailers is one of the most important element of marketing management. Retailing positioning is an integrated management activity that takes in elements of the retail mix and is of critical importance for retailers and for manufacturers. Whereas consumer theory has traditionally place brand choice as the focus of the analysis, there is evidence that consumers are turning to shopping strategies rather than brand decisions. The objective of this research is to better understand the positioning of Spanish retailers analyzing the different perceptions between high frequency and low frequency consumers. Our results show the difficulties hypermarkets are facing to deliver a distinctive consumer proposition and the different perceptions on discounters accordingly to different types of consumers reflecting the need to deliver further benefits to consumers beyond pricing. On the other hand the overwhelming superiority of Mercadona is shown through their relevant price and store brands proposition leading consumer to perceive high level of service and consumer satisfaction.

JEL Classification:
M31
Key words:
store brands,
positioning,
retailer strategy,
consumer satisfaction,
price.

RESUMEN

Dada la alta competitividad existente en la actualidad en los mercados de gran consumo, la decisión de posicionamiento es una de las más importantes a las que los detallistas se enfrentan a la hora de determinar su estrategia competitiva en el mercado. Esta decisión es importante no sólo para los detallistas sino también para los fabricantes, porque aunque la literatura del comportamiento del consumidor suele enfocar su análisis en la elección de marca, existe en la actualidad una clara evidencia de que los consumidores deciden antes "dónde comprar" que "qué marca" comprar.

El objetivo de esta investigación es profundizar en el posicionamiento de los detallistas en España, analizando las distintas percepciones existentes en el consumidor, distinguiendo entre consumidores de "alta frecuencia" o "habituales" y consumidores de "repertorio" o de "baja frecuencia".

Nuestros resultados muestran las dificultades que los hipermercados tienen para transmitir un posicionamiento diferenciado y relevante al consumidor, y las diferentes percepciones de los discounters según los distintos tipos de consumidores, sugiriendo la necesidad de un reposicionamiento mas allá del puro precio. Por otra parte, se observa el abrumador dominio de Mercadona que ha sido capaz de posicionarse no sólo en precio sino en una oferta relevante de marca de distribuidor que la sitúa en altos niveles de satisfacción y percepción de servicio por parte de los consumidores.

Clasificación JEL:
M31
Palabras clave:
marcas de distribuidor,
posicionamiento,
detallistas,
satisfacción,
precio.

Introduction

In today's highly competitive marketing environment, the positioning decision is one of the most important element of marketing management (Blankson *et al*., 2008) because of its impact on the long-term success of companies in the marketplace. Scholars have investigated positioning methods to guide the company's choice of positioning strategies (Gursoy et al., 2005).

Thus, a key strategic decision of modern retail management is to define the positioning strategy of the retailer –ie. to define their consumer value proposition. Positioning is the act of designing an organization's image to occupy a distinctive place in the target market's mind and it is based on consumers' perceptions (Brooksbank, 1994). Its importance is given by the fact that without a well-defined positioning paradigm, it is hard for a product or a company to serve its intended purpose and survive in the competitive marketplace of today (Gursoy et al., 2005).

Retailing positioning is an integrated management activity that takes in elements of the retail mix such as merchandising, store format, assortment, price strategy, promotional efforts (Walters and Laffy, 1996) and others like service, advertising or the innovation factor developed by the retailer. These factors create a point of differentiation from the competition, and help to enhance the retail store brand. Intensifying retail competition and growing market saturation are continuously forcing retailers to develop a better understanding of positioning to generate differentiation tools (Amirani and Gates, 1993; Choi and Coughlan, 2006).

A retailer's positioning is frequently influenced by consumer trends, market performance and competitor's seeking opportunity for profit and growth (Corstjens and Doyle, 1989).

Whereas consumer theory has traditionally place brand choice as the focus of the analysis, there is evidence that consumers are turning to shopping strategies rather than brand decisions. Some studies indicate that decision about where to shop precede brand choice (Millan and Howard, 2007). There are several key factors that can influence consumer choice and retailer perception. Purchase experience, assortment, price, promotion, advertising, store brand quality, service and innovation are key variables that determine the image of retailers on consumers.

Concerning store brands, over the last few years, private labels have steadily eroded the market share traditionally held by national brands (Nielsen, 2007; Juhl, 2006). In fact, in 2008, private labels increased their market share to 25% and 50% in most European markets and to 20% in the US (PLMA, 2009). One factor that explains this situation is the improvement on the consumer perception of store brands (Ipsos Mori, 2006) leading to a change on consumer behavior towards traditional manufacturer brands (Burt, 2000).

Spain with 34% store brand share has one of the highest shares worldwide (PLMA, 2009). Growth of store brands in Spain is estimated at 115% between 2000 and 2007 (Euromonitor 2008) which makes the subject even more relevant.

As it is true for any brand, positioning a store brand can exert an important influence on its performance and affect retailers' image and positioning (Sayman et al., 2002; Tarnowsky, 2007). Then, we consider that improving our understanding on factors influencing retailers choice, especially in the context of store brands, will be of great relevance for the academic community and for the industry.

We intend to examine through several statistical procedures whether consumers perceive differences in the positioning of different retailers in Spain and whether this perception stems from different consumer purchase behavior on the stores. We are interested in answering the following research questions:

1. Which is the consumer perception of retailer's positioning in Spain?
2. What are the critical factors that define retailers competitive advantage in the perceptual map?
3. Are there significant differences on perception depending on the frequency of purchase in the stores?
4. What are the implications for retailers strategies?

Theoretical background

Positioning is based on consumer perceptions (Brooksbank, 1994) and its importance is due to the fact that is a driver of consumer choice (Knuston, 2000) based in a value proposition different from competitors (Herman and Huber, 2000).

As perception is based on image it is important to identify which are the variables consumers focus their interest on. Different authors have defined different perceptual typologies concerning product and service attributes relevant for consumers (Abril et al., 2009). Blankson and Kalafatis (2001) propose eight generic dimensions suitable for both. Lovelock and Wright (2001) specify some attributes for services. Under retailer context Jim Yoo and Chang, (2005) identify two set of attributes: functionals –assortment, place, value for pricing, promotion- and psychologicals– represented by sensorial cues and experience.

In order to perform our study we will analyze some key factors consumers consider when choosing a retailer.

Turley and Chebat (2002) established theoretical links between retail management strategy and the image evoked by a wide range of tangible and intangible factors. Therefore measuring retailer image components serves to evaluate the success of the retail strategy and the retailer's bid to satisfy the target market.

Marketers only have partial control of their companies and products positioning in the marketplace (Dibb et al., 1997). Retailers have even less control in the positioning of their companies because of the nature of the service and the dependence on the assortment of brand and products positioning. What retailers sell are not only physical objects, but performances and experiences. Experiences differ substantially from service provider to service provider and from customer to customer (Brakus et al., 2009). Thus, related to the retailer decision on their positioning strategy it is also the management decision to adapt retailer business to a changing retail environment, thus repositioning their retailer brand accordingly.

Retail store image is considered one of the most important determinants of success and there have been numerous studies attempting to define store image (Newman and Patel, 2004). There is a multifaceted explanation(s) of image made up of components or attributes, both physical and psychological, all of which depict the store in the mind of customer. It is therefore important to understand how store image shapes customer choice criteria.

Store image attributes can vary across the retail sector (Birtwistle and Shearer, 2001). In the context of this research, it is possible to assign attributes that relate to stores in general, like prices, advertising and promotion, service, assortment, or innovation (Yoo et al., 2000), all of them highly indicative of retail management strategy. For example, Newman and Pattel (1983) stresses that the range of merchandise – assortment-, promotions and the atmosphere of the stores are the most important factors influencing consumer choice. In fact, retailers deliver their offerings through customer experience, thus including several different aspects that could influence it. As said, the most common factors studied in the literature are the quality of service, product assortment, pricing policy, promotional and advertising activity as well as store brand quality. We will consider all of them through validated items and scales that will reflect consumer perceptions on key Spanish retailers.

Understanding how a retailer should be positioned in terms of brand assortment is of critical importance as it is related to its image (Ailawadi and Keller, 2004). Consumer's perception of the depth of a retailer's assortment is an important dimension of store image as well as key driver of store choice. As the perceived assortment of brands, flavors and sizes increases, variety-seeking consumers will perceive greater utility.

Related to the assortment is the retailer store brand strategy. Store brands have been considered of special importance in recent years for retailer´s strategy (Baltas, 1999). Reason for this is that store brands are more profitable for retailers, enhance their negotiation power towards manufacturers, and they contribute to differentiate their offerings and build consumer store loyalty. (Ailawadi et al., 2008; Alan et al., 1995). The presence of store brands improve channel efficiency (Chen et al., 2009) and the fact that retailers control store brands positioning is one of the key reasons that makes store brands so valuable to them (Morton and Zettelmeyer, 2004).

Since store brands influence the retailer's positioning and image, understanding how a retailer should position itself in terms of brand assortment is of critical importance (Ailawadi and Keller, 2004).

Price levels and depth and frequency of promotions are also of capital importance to retailer perceived positioning as retailers image can be influenced by attributes like average level of prices and how much variation there is in prices over time (Lattin and Bucklin, 1989). Also other authors find significant impact of promotions in retailer's choice (Kumar and Steenkamp, 2007).

Finally, purchase experience is becoming a critical attribute which is also an important marketing trend. We understand marketing experience as company sponsored activities and programs designed to create a special brand related interactions (Brakus et al., 2009). Schmitt (1999), developed the concept of Customer Experience Management, which he defines as the process of strategically managing a customer 's entire experience with a product or company.

Customer experience is thus critical for retailers who are in an ideal position to create experiences for their customers, as they are responsible for the total purchase experience: from location, store image, assortment, offerings, advertising, delivery, customer service and post purchase experience.

Method

In order to accomplish our research objectives we performed an empirical study based on a survey of 422 interviews. Household purchase responsibles were contacted face-to-face at the exit of different supermarkets and hypermarkets. We included enough sample size in order to be able to measure perception and retailers image by lead retailers, including international ones like Carrefour, Dia, Auchan (Alcampo), Lidl, as well as local ones like Mercadona and Eroski.

Personal interviews were selected as method of survey in order to better handle the information on brands to show consumers and explain the rating method used with the likert scales.

Respondents were approached randomly at the selected retailers. We divided consumers accordingly to their purchase behavior by retailer. We named one group high frequency consumers of eac h specific retailer and the other group low frequency consumers . In the high frequency consumers we basically included consumers that consider that store as their first choice and their most frequently retailer visited. In the second group we included consumers that consider that retailer as one in their repertoire and those that declare to shop from time to time on it.

The six retailers we analyzed account for more than 50% of Consumer Packaged Goods market in Spain. Carrefour captured 13.9% of all food retailers sales in 2007 and Mercadona was a whisker behind on 13.8%. The top five players together accounted for around 50% of the sector, making Spain still one of the more fragmented markets in Western Europe.

Local retailer – Grupo Eroski– along with French operator, Auchan, represent the second tier, well ahead in sales terms of German hard discounter Lidl. But while Auchan has lost market share, Lidl and Eroski (thanks largely to the Caprabo acquisition) are making good inroads (Euromonitor, 2008).

We gathered consumer information by retailer related to perceptions of key factors as previously defined- price, store brand quality, service, assortment, promotion, advertising and innovation ratings; we also asked for consumers overall satisfaction level.

Perceptions were measured through a 7-point likert scale. Items are shown in Table 1.

Table 1- Items rated by household purchase responsible

Items	Scale
Satisfaction-Level of satisfaction	1-7
Price- Prices in this retailer are cheap	1-7
Assortment-In this retailer I always find the brands I look for	1-7
Store brands- This retailer has store brands with good quality	1-7
Service-Overall this retailer has a good service	1-7
Promotion- This retailer has good promotions	1-7
Advertising-I like the advertising of this retailer	1-7
Innovation- It is an innovative retailer	1-7

We performed a Principal Component analysis with varimax rotation for the total sample in order to get the perceptual map (Hair et al., 2006). After, in order to compare differences in perception due to the frequency of purchases in the stores, we built the perceptual map for high frequency and low frequency consumers.

Results

First, we map retailers positioning according to consumers ratings on key attributes as defined in Table 1. As consumers typically shop in more than one retailer we have included all retailers where consumers declare to shop. Results for components are shown in table 2. We find two factors that explain 83% of the variance in the sample.

We map the retailers perception accordingly to these two factors as shown in table 3. First factor is related to assortment, service innovation and store brand quality. Second factor is loaded by high prices, promotion and advertising. We interpret the factor 2 as high price, promo and advertising perception and the second as representing store brands and service proposition to consumers.

The second factor however clearly differentiates Mercadona from Dia and Lidl showing strong consumer perception related to satisfaction and store brands. We can interpret that the retailers, specifically, hypermarkets retailers like Carrefour, Alcampo and Eroski appear not to have a clear differential perception among them. Carrefour stands out through promotion and advertising, closer to assortement and services. We can observe a non-clear profile of Eroski and Alcampo which show an undifferentiated position. Thus, we can observe four types of retailer offerings according to consumer perceptions: Price (Lidl, Dia), Price and quality store brands, satisfaction (Mercadona), Promotion (Carrefour), non clear perception (Alcampo, Eroski).

(Graph 1)

Table 2- Total Variance Explained by Components

Com.	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Total	% of Variance	Total	% of Variance
1	5,645	70,573	70,573	3,856	48,207	48,207
2	1,059	13,236	83,809	2,848	35,602	83,809

Table 3- Rotated Component Matrix

	Components	
	1	2
Satisfaction	**0,964**	0,104
Price	-0,042	**-0,961**
Assortment	**0,786**	0,296
Store Brand	**0,973**	0,098
Service	**0,828**	0,213
Promotion	0,208	**0,904**
Advertising	0,215	**0,926**
Innovation	**0,765**	0,31

Extraction method: Principal Components.
Rotation: Varimax with Kaiser.

We plot retailers brand and attributes in the perceptual map with the results shown in Graph1. Basically we can identify the price as one of the key differentiator in perception dividing retailers in two groups: Lidl, Dia and Mercadona (considered the cheapest) and the rest of retailers Carrefour, Alcampo, Eroski and Dia.

We now analyze consumer perception splitting consumers according to their frequency of purchasing on the stores (Lf: low frequency, Hf: High frequency). We analyze through ANOVA the existence of significant differences by items shown in Table 4 .

We find that the differences of perception between these types of consumers are larger among discounters than among hypermarkets. These results suggest that the experience in discounters significantly contribute to positively influence retailer image and perception, whereas on hypermarkets consumer perceptions of the retailer are closer to the one achieved through a more frequent experience.

Graph 1- Positioning map according to purchase responsible ratings

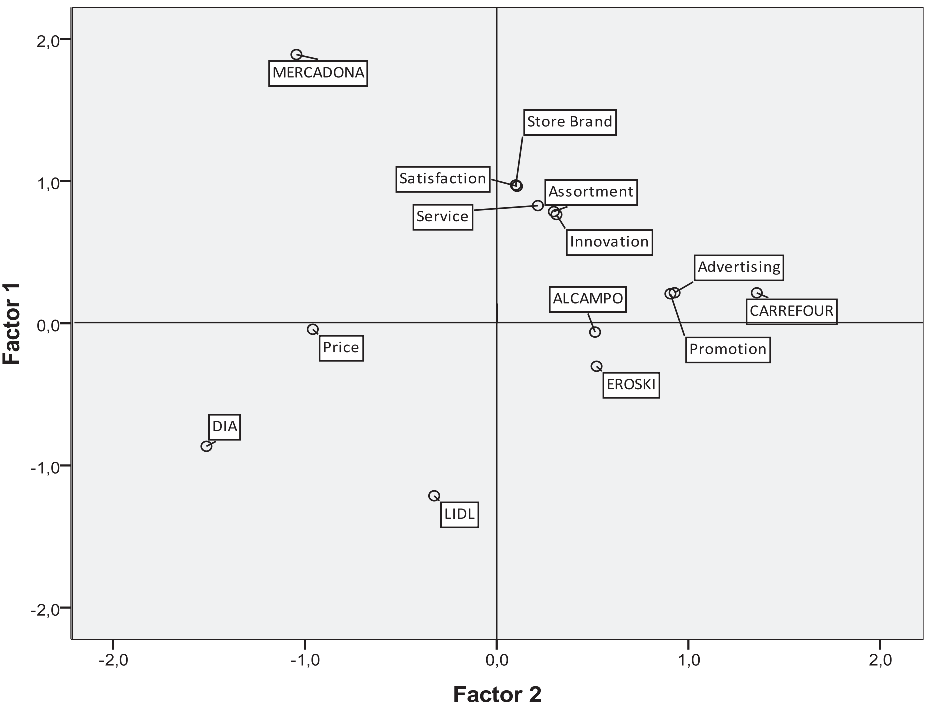


Table 4- ANOVA of the differences between low and high frequency consumers

	ALCAMPO			CARREFOUR			DIA			EROSKI			LIDL			MERCADONA		
	Lf	Hf		Lf	Hf		Lf	Hf		Lf	Hf		Lf	Hf		Lf	Hf	
Satisfaction	4,54	5,20	**	4,68	5,16	*	3,75	4,99	**	4,19	5,43	**	3,67	5,53	**	5,24	6,15	**
Price	4,36	4,95	**	n.s.			5,50	6,05	**	n.s.			5,46	6,12	**	5,25	5,77	**
Assortment	4,90	5,48	**	5,28	5,73	*	3,11	4,13	**	4,29	4,80	*	2,83	4,15	**	4,73	5,25	**
Store Brand	4,46	5,07	**	n.s.			3,75	4,83	**	4,46	5,47	**	3,68	4,88	**	5,36	6,07	**
Service	4,22	4,90	**	n.s.			2,84	3,43	**	4,28	4,86	*	2,96	4,33	**	4,53	5,32	**
Promotion	4,51	4,91	*	4,83	5,27	*	3,69	4,45	**	4,22	5,00	**	4,02	5,44	**	n.s.		
Advertising	n.s.			n.s.			2,54	3,40	**	n.s.			3,14	4,55	**	n.s.		
Innovation	n.s.			n.s.			2,36	3,09	**	n.s.			2,96	3,95	**	n.s.		

** p<0.05* *** p<0.01* Lf: low frequency. HF: high frequency

It is important to mention that in discounters, eventhough almost all the scores of the items are quite low (except for price), the fact of being a frequent buyer helps strengthen the image of the retailer brand, increasing the scores of all the items at a significant level.

On the other hand we can see that, as expected, advertising does not change as a consequence of the experience of buying, but in the case of discounters, it does as the perception of frequent vs. not frequent buyers is significant.

It stands out the perception of Mercadona as taking the “best out of both worlds” discounters and hypermarkets and also showing significant differences on the items (while both high) between frequent and non frequent consumers.

When going deeply on analyzing the perceptions of frequent consumers we find a better explanatory perceptual map with a third factor emerging as shown in Table 5.

With the same method and criteria we have mapped the attributes rated and plot the retailers under these factors. The results are showed below in Table 6 and Graph 3. Due to the difficulty to visualize the three dimensions we have plot and extended the map on graphs 4, 5 and 6 mapping factors 1 and 2, factors 2 and 3 and factors 1 and 3 in three different maps.

The experience with the shop reflects a split up of factor 2 within high frequency shoppers. In this case, the customer seems to realize the need to choose among price and assortment. Discounters who offer best prices do not offer wide assortments and it emerge the role of store brands and satisfaction as a key factor for consumer perception and retail image. (Graph 4)

Table 6- Rotated Component Matrix

	Components		
	1	2	3
Satisfaction_Hf	**,984**	-,141	-,108
Price_Hf	,042	**-,944**	-,161
Assortment_Hf	,308	**,877**	,008
Store Brand_Hf	**,856**	,308	-,379
Service_Hf	**,761**	,620	,119
Promotion_Hf	-,074	,155	**,983**
Advertising_Hf	-,049	,048	**,990**
Innovation_Hf	**,740**	,508	,428

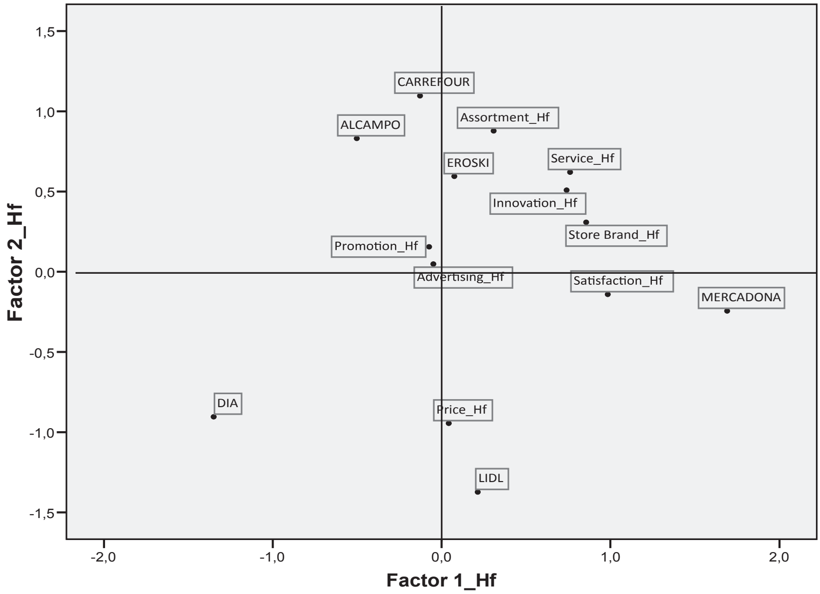
Extraction method: Principal components
Rotation method: Varimax with Kaiser

Table 5 - Total Variance Explained by Components

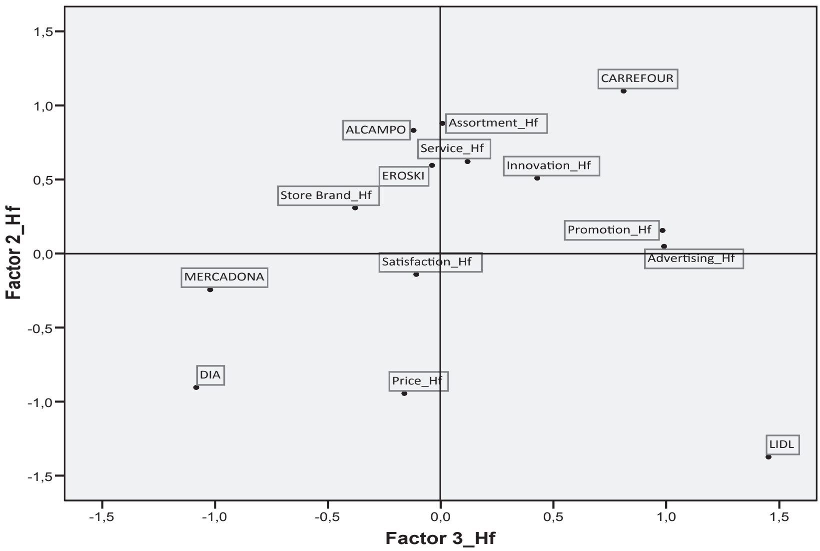
Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Total	% of Variance	Total	% acumulado
1	3,937	49,216	49,216	2,931	36,640	36,640
2	2,538	31,731	80,947	2,444	30,547	67,187
3	1,224	15,304	96,252	2,325	29,065	96,252

Extraction method: Principal components

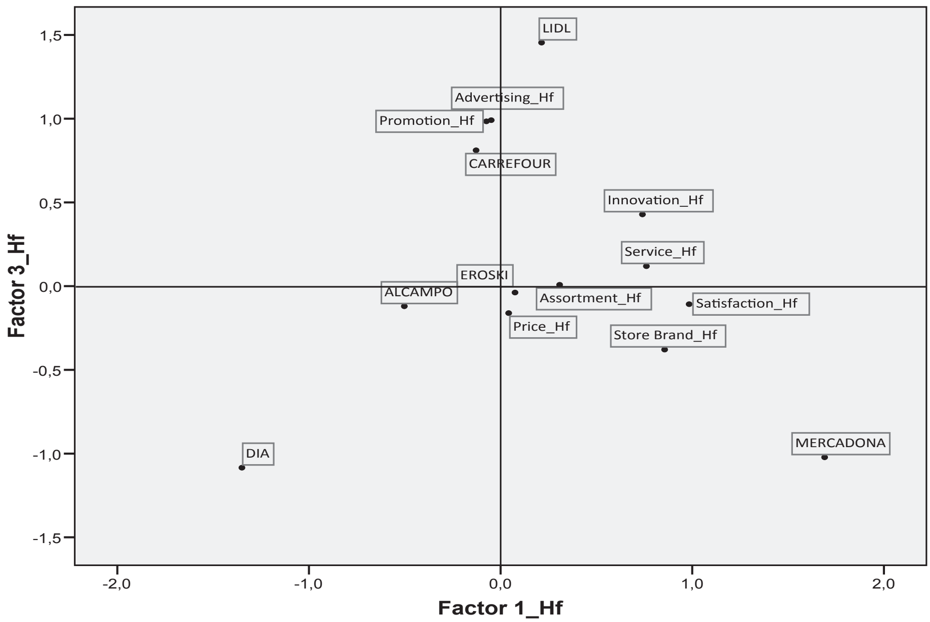
Graph 4- Positioning map according to high frequency customers. Factors 1 and 2



Graph 5- Positioning map according to high frequency customers. Factors 2 and 3



Graph 6- Positioning map according to high frequency customers. Factors 1 and 3



Conclusions and Discussion

The objective of this research was to better understand the positioning of Spanish retailers from a consumer point of view. In particular, we wanted to understand which are the critical factors that define retailer's competitive advantage and whether those factors vary accordingly to the frequency of consumer purchases.

We find pricing as one of the key attributes for retailer's perception along with assortment and promotion as a second factor. According to the perceptual map we find discounters like Dia and Lidl perceived as cheap prices, Carrefour as related to assortment and promotion, and Eroski and Alcampo as being undifferentiated from the rest of retailers. It is interesting to highlight Mercadona's perception on good prices along with the good service and good store brand dimensions. Mercadona scores are among the highest on consumer ratings being able to enrich the tradional "price value" positioning with added benefits, especially regarding store brands and service. It seems that this dual positioning is difficult to match by the other competitors that are perceived either as pricing or assortment positioned. Consumer's image on Mercadona represents a competitive advantage in the market place as could be infered from its sustainable growth in the last years.

Interestingly, we identify significant differences on perception between high frequency and low frequency consumers by store but only in the discounters segment. Differences between the groups on the researched variables are stronger (*p<0,05*) on discounters (Dia and Lidl) and not as strong on hypermarkets . These results suggest that the purchase experience affects more heavily discounters than the rest of the retailers. Reason why could be related to the poor image consumers have in general on discounters in comparison with the rest of retailers, and thus, there are more opportunities to improve it through point of sale experience. Discounters are rated the lowest in all scores (except for price), however frequent buyers have highers scores for all the items at a significant level, probably due to purchase experience.

Another reason for the low scores of discounters could be the polarizing effect of offering "just price" as the only consumer proposition. Price is very well valued by consumers interested on pricing but is not enough relevant "stand alone" for the rest of the consumers. It is interesting to mention that as expected, advertising does not change as a consequence of the experience of shopping but in the case of discounters, it does, as the advertising perception of frequent vs. not frequent buyers is significant. This difference is possibly due to the fact that most of the advertising on discounters is related to price and thus will be more relevant and noticeable for consumers that actually shop on them than for those not interested on price.

On the contrary we find that the perception of hypermarkets is more balanced and similar between frequent and non frequent consumers.

The implications of these results for discounters are several. First, it seems that discounters should enhance their value proposition to consumers beyond price to attract new consumers. By doing so, the experience in the shop will improve in turn their retail image. Recent changes on discounters strategies seem to endorse this recommendation. It is the case of Lidl and its recent initiative to launch a gourmet private label line "Deluxe" endorsed by famous chef Sergi Arola. This initiative aims to enhance Lidl value proposition beyond price.

Dia has also tried to enrich their consumer proposition redecorating their stores and launching Dia- Market stores to broaden their consumer offer.

For hypermarkets our results show the low effect that their strategies to communicate "best price " have had on their image, and thus, the necessity to create and reinvent a differentiated space beyond Mercadona offer.

We doubt on the effectiveness of recent polices to imitate "Mercadona" proposition. On the contrary, we believe hypermarkets should be able to build an enhanced and distinctive consumer proposition based on a broader meaning of "value" to consumers.

In this sense it seems that retailers positioning in Spain is heavily influenced by Mercadona positioning which has been able to combine a credible positioning delivering pricing as well as service and innovation through their store brands.

Different assortment, including private label tier strategy, will be from our perspective the only gap that Mercadona could leave as a competitive advantage to their current competitors, especially to hypermarkets as they will be able to combine their assortment perception with a value proposition.

Limitations and further research

This study is not exempt of limitations. First, we are measuring only the top six retailers in Spain that despite representing a significant share of the market, beyond 50%, are not representing regional chains. Secondly we are measuring declared consumer behavior and this measurement could differ from real purchase behavior;

and third, we are not considering perceptions of other types of purchase influencers apart from the purchase responsible.

Opportunities for further research could take into consideration the above limitations and enhance the scope of the study to include regional chains. We believe that tracking the retailers positioning in a consumer panel can also shed light on the effectiveness of retailers recent actions to reposition their brand and how different marketing activities influence consumers perception of the retailers.

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