Shopper characteristics, product and store choice criteria: a survey in the Greek grocery sector

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Keywords

Consumer behaviour, Brand awareness, Stores and supermarkets, Greece, Demographics

Abstract

Considers the brand and store choice behaviour of grocery shoppers and explores relationships among consumer characteristics, brand choice criteria and store selection criteria. A survey was carried out to collect data on demographic profiles and decision criteria of shoppers in the Greek grocery sector. The data were collected through in-store, personal interviews and subsequently analysed using descriptive as well as optimal scaling methods. The data reveal asymmetric evaluations of choice criteria and some clear and interesting patterns regarding the two choice processes. In addition, several associations between brand and store preferences are identified and related to specific demographic characteristics of the consumers. The present work is a first attempt at addressing these issues in the grocery Greek market and leaves considerable room for further research.

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Introduction

In the marketing literature, particular attention is paid to brand and store choice criteria, as well as the role of individual characteristics in the same consumer decisions (e.g. Lumpkin and Greenberg, 1982; Lumpkin *et al.*, 1985; McGoldrick, 1990; Burt and Gabbott, 1995; Peter *et al.*, 1999).

However, brand choice criteria, store selection criteria and shopper characteristics are usually considered in isolation. Despite the obvious inter-dependencies, there is little, if any, published research on simultaneous analysis of these three variable groups.

The purpose of this study is to investigate these issues in a market, for which no related research has been published. More specifically, we shall consider the relationships among consumer characteristics, brand choice criteria and store selection criteria in the Greek grocery sector. This market currently attracts considerable international interest and investments. Large European grocery chains (e.g. Carrefour, Delhaize, Lidl) have already entered the market either directly or indirectly.

Setting aside the origin of the examined data, the present study is among the very few recent studies that jointly address such relationships in grocery retailing. It is intended to shed further light into the segmentation of the food retail market by considering the importance of product and store attributes for consumers with different individual characteristics such as age, income, and education level.

In the subsequent section, we present a review of the extant literature, followed by a presentation of the Greek grocery market. Next, the research methodology is provided. This is followed by analysis and discussion of the findings. A concluding section summarises the paper.

Special thanks are due to the Editor and two anonymous *IJR&DM* reviewers for constructive comments. We would like to thank the retail chains that kindly offered permission to carry out in-store interviews and acknowledge the constructive comments on an earlier version of the manuscript by conference participants in the 30th EMAC Conference, Bergen, Norway, 2001.

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Literature review

In recent years, considerable attention has been paid to product and store criteria that consumers may apply in evaluating the decision alternatives. In the following paragraphs, we provide a brief review of the literature regarding these two core issues.

Product choice criteria

The area has been recently reviewed by Williams (2002) who concluded that product-related decision criteria may relate to either utilitarian criteria, i.e. objective, economic, rational, and functional, or hedonic criteria, i.e. subjective, emotional, non-rational, and symbolic (Hirschman and Holbrook, 1982; Holbrook and Hirschman, 1982; Athola, 1985; Havelena and Holbrook, 1986; Kivetz, 1999; Blackwell *et al.*, 2001). Examples of utilitarian product benefits include low price, warranty, product features and well-known brand name, while hedonic product benefits include, among other things, prestige, quality, and style/appearance.

Store choice criteria

In respect to the store choice criteria, a growing literature has identified the most important store attributes of retail patronage. Specifically, store image has been identified as an important determinant of consumer store preference (e.g. Clarkson *et al.*, 1996; Clarke *et al.*, 1997; Wakefield and Baker, 1998; Erdem *et al.*, 1999; Hernandez and Bennison, 2000). In addition, Arnold *et al.* (1997) and Kim and Jin (2001) found that location was the most important attribute in choosing a store. Low prices and product assortment were found as important store choice criteria in the empirical work of Arnold *et al.* (1997) and Seiders and Tigert (2000). Other studies have examined the role of store environment (Baker *et al.*, 1994), store atmosphere (Donovan *et al.*, 1994; Turley and Milliman, 2000), product assortment (Grewal *et al.*, 1999), store price format (Bell and Lattin, 1998), customer service (Sparks, 1995) and store brands (Burt, 2000; Ailawadi, 2001).

Product/store choice criteria and consumer demographics

Despite the obvious importance of detecting the general product and store attributes that influence consumer decisions, related research suggests that the importance of specific criteria may be partially determined by the demographic characteristics of the consumers. This may lead to heterogeneous preferences that vary over people with different demographic profiles. For example, Tigert *et al.* (1992) have concluded that warehouse club members are distinctly "upscale from the general population", while Stone (1995) found that the demographics of warehouse club members and supermarket shoppers differ significantly. Also, Arnold (1997) provided empirical evidence that the demographic profile of consumers who shop at the large format stores is different from the profile of the non-shoppers.

Recently, Kim and Jin (2001) compared the profiles of the domestic versus the multinational discount store shoppers. Except for group differences in terms of occupation, data analysis has not shown any significant differences between the two groups of shoppers with respect to age, family size, income and education.

It is evident from the foregoing discussion that the simultaneous examination of brand choice criteria, store choice criteria, as well, as the demographic characteristics of the shoppers will considerably increase our understanding of shopper behaviour and thus provide retailers with empirically determined insights for design of segmentation and marketing strategies.

Greek grocery market

In the last ten years, the Greek grocery market has witnessed tremendous changes in its structure[1], which were caused by a number of mergers and acquisition. The most notable examples are as follows:

- In the late 1990s, one of the largest strategic alliances was announced between the multinational retailer Carrefour and the local retailer Marinopoulos SA.
- The Belgian supermarket chain Delhaize had bought 51 per cent of the local retailer AB Vassilopoulos.
- In October 2000, AB Vassilopoulos acquired TROFO supermarkets (and its ENA wholesale outlets) and became the second largest retailer after Carrefour.
- Since the early 1990s, Veropoulos has acquired Chalkiadakis (a supermarket

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chain in Crete with considerable local power) and Panemporiki.

- Atlantic Supermarkets has recently extended its distribution network by acquiring Galinos Laoutakis SA, a supermarket chain with dominant presence in central Greece and the Greek islands.

Further, the Dutch Makro and the Greek Metro introduced a number of large cash and carry outlets across Greece. In addition, a number of discount stores have started operating in Greece since 1995. The first such discount chain was Dia Hellas, which resulted from the co-operation of Marinopoulos SA and the French retailer Promodes. Dia currently operates 210 stores in Greece. Bazaar Discount is also a main player with more than 40 stores. Finally, in 2000, the German discount retailer Lidl also entered the Greek market. At the moment, there are more than 40 Lidl stores in the country, while Aldi, another German discount chain, is considering its expansion in Greece.

As it can be seen in Table I, the number of supermarket (SM) chains accounts for 63.7 per cent of the total number of supermarkets. Moreover, there has been an increase of 50.6 per cent in the number of supermarkets in the period 1996-2000, from 1.938 to 2.919. This considerable increase resulted from both a proportional increase in the number of stores owned by SM chains as well independent SMs. It is also interesting to mention that the number of supermarket chains with more than 16 supermarkets has doubled.

Currently, there are eight groups of grocery retail companies, most of which own at least two retail chains (Table II).

In Tables III and IV, we provide the sales turnover and market shares of the main grocery retailers in Greece for the last three years. The grocery market is characterised by high concentration, since four retailers, led by Carrefour-Champion, account for more than 65 per cent of the total market sales, while the remaining percentage is hold by a large number of local retailers throughout the country. Moreover, during the last three years, the number of stores operated by the main grocery retailers is steadily above 1,100.

In addition to structural changes outlined above, there is a much clearer segmentation strategy followed by grocery retailers. For example, AB Vassilopoulos can be positioned at the "quality" end, Carrefour-Champion, Veropoulos and Sklavenitis at the middle, while discount stores such as Dia, Bazaar and Lidl target the "low quality" end of the grocery retail sector.

In conclusion, in the Greek grocery market there has been a high degree of merger and acquisition activity, which resulted in the dominance of international, multi-chain firms.

Table II Groups of grocery retailers in Greece

Group's name	Group's companies
Carrefour	Carrefour-Marinopoulos SA, Dia Hellas SA
Alpha-Beta Vassilopoulos	Alpha-Beta Vassiliopoulos SA, Trofo SA, Ena SA
Sklavenitis	Sklavenitis SA
Veropoulos	Veropoulos Bros, Chalkiadakis SA, Panemporiki SA
Atlantic	Atlantic Super Market SA, Galinos Laoutakis SA
Metro	Metro SA
Masoutis	Masoutis SA, Biskas Bros, Dyo Alpha SA
Pente	Pente SA, Argo SA

Source: Laboratory of Marketing, Athens University of Economics and Business (2002)

Research methodology

Data on the perceived importance of several product and store characteristics in brand and store choice decisions were collected through 200 personal, in-store interviews. The personal, in-store interview was chosen as a cost-effective means of collecting survey data

Table I Structure of the Greek supermarket sector between 1996-2000

	1996	1997	1998	1999	2000
Number of SM stores owned by SM chains	1,149	1,320	1,496	1,719	1,862
Number of independent SM stores	789	756	753	1,021	1,057
Total number of SM stores	1,938	2,077	2,252	2,740	2,919
Number of SM chains with 16 + stores	700	872	1,014	1,235	1,408

Source: Databank, Com-Center Eds (2000)

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Table III Sales turnover of main retail chains in Greece (1999-2001)

	Sales (€)		
Retail groups	**2001**	**2000**	**1999**
Carrefour-Champion	3,873,275	3,616,294	3,422,317
Carrefour Marinopoulos SA	3,324,634	3,186,618	3,108,237
Dia Hellas SA	548,641	429,676	314,080
AB Vassilopoulos total	2,258,125	2,125,901	2,118,748
AB Vassilopoulos	1,821,316	1,466,030	1,281,462
Trofo, Ena	436,809	659,871	837,287
Sklavenitis	1,923,853	1,734,040	1,550,384
Veropoulos Total	1,595,918	1,486,620	1,464,937
Veropoulos	1,157,282	1,069,116	1,050,288
Panemporiki	227,600	225,275	234,286
Chalkiadakis	211,035	192,229	180,363
Makro Hellas	1,152,710	1,101,536	1,071,393
Atlantik total	1,127,347	968,764	916,859
Atlantik	827,042	689,739	689,085
Galinos	300,305	279,024	227,774
Masoutis total	930,061	785,137	768,215
Masoutis	728,049	623,810	554,284
Biskas	202,012	161,327	213,931
Metro	933,711	789,391	687,635
5 SA	762,453	637,056	555,663
5 SA (Galaxias)	677,335	557,479	484,679
Argo Market	85,118	79,576	70,985
Balis	213,897	219,130	224,249
Alpha Delta-Biskas Plus	166,558	165,994	147,940
Xinos	162,463	149,234	123,119
Market In	166,820	149,234	123,119
Bazaar	142,903	131,513	120,290
Doukas	127,291	117,061	105,778
Extra	127,801	116,072	113,851
Total (top 16)	10,084,429	11,338,555	10,931,466

Source: Laboratory of Marketing, Athens University of Economics and Business (2002)

for several reasons. In Greece, the traditional family structure is the norm and almost 80 per cent of households include at least two individuals. Moreover, extended households consisting of wife, husband, grandparents and children of higher age are still quite common. In this family structure, grocery shopping is an activity performed mainly by the female head of the household (Kouremenos and Avlonitis, 1995). Therefore, a telephone or household survey cannot ensure that the available respondent is the main grocery shopper of the household or adequately familiar with the current grocery setting. In view of the above limitations and the exploratory character of the present study, we had to be more modest in our objectives and adopt an implementable approach. The personal, in-store interview was selected as a possibly more efficient means of data gathering for our specific purposes. It is worth noting that personal interviewing is the dominant data collection method in Greece owing to various and largely idiosyncratic reasons outlined above and thoroughly discussed in Kouremenos and Avlonitis (1995).

The same idiosyncratic characteristics of the Greek grocery shopper make the imposition of explicit sampling quotas based on national statistics rather inappropriate. There is little similarity between the general population, for which aggregate statistics are available, and the grocery store clientele. The interviews were distributed over the grocery chains according to their market shares as reported in Table IV. This simple quota was imposed to ensure proportional

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Table IV Market shares of main players in the Greek grocery market (1999-2001)

	Market share		
Retail groups	2001 (%)	2000 (%)	1999 (%)
Carrefour-Champion	26.7	27.4	27.5
Carrefour Marinopoulos SA	22.9	24.2	25.0
Dia Hellas SA	3.8	3.3	2.5
AB Vassilopoulos total	15.6	16.1	17.0
AB Vassilopoulos	12.6	11.1	10.3
Trofo, ENA	0.0	5.0	6.7
Sklavenitis	13.3	13.1	12.5
Veropoulos total	11.0	11.3	11.8
Veropoulos	8.0	8.1	8.4
Panemporiki	1.6	1.7	1.9
Chalkiadakis	1.5	1.5	1.4
Makro Hellas	7.4	7.7	7.9
Atlantik Total	7.8	7.3	7.4
Atlantik	5.7	5.2	5.5
Galinos	2.1	2.1	1.8
Masoutis total	6.4	6.0	6.2
Masoutis	5.0	4.7	4.5
Biskas	1.4	1.2	1.7
Metro	6.4	6.0	5.5
5 SA	5.3	4.8	4.5
5 SA (Galaxias)	4.7	4.2	3.9
Argo Market	0.6	0.6	0.6
Balis	1.5	1.7	1.8
Alpha Delta-Biskas Plus	1.1	1.3	1.2
Xinos	1.1	1.1	1.0
Market In	1.1	1.1	1.0
Bazaar	1.0	1.0	1.0
Doukas	0.9	0.9	0.9
Extra	0.9	0.9	0.9
Total (top 16)	100.0	100.0	100.0

Source: Laboratory of Marketing, Athens University of Economics and Business (2002)

representation of heterogeneous retail environments and store clienteles and seven chains with at least 5 per cent market share were selected for analysis. Permission to carry out the interviews was kindly given by the management of the seven large supermarket chains in the Athens metropolitan area. The specific retail outlets were selected so as to cover heterogeneous residential areas.

Data were collected by means of a questionnaire that was concise and highly structured to cope with obvious time limitations. It contained standard itemised rating scales measuring the importance of seven store attributes and six product attributes (Zikmund 1997). Five individual characteristics were also measured using relevant categorical indicators. These are reported in Table V.

Data analysis and results

The distributions of the importance variables of product and store choice criteria are presented in Table VI (Zikmund 1997). The upper part of Table VI reports percentages of product choice criteria and the lower part reports percentages for the store selection criteria. The mean values of all variables are also presented.

The data in Table VI indicate that product quality and product features are considered the most important product choice criteria, while packaging attracts the least attention. The

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Table V Variables measurement

Variable name	Description	Structure
Product choice criteria		
PBRAND	Importance of brand name	Five-point importance scale[a]
PPRICE	Importance of product price	Five-point importance scale
PQUAL	Importance of product quality	Five-point importance scale
PPACK	Importance of packaging	Five-point importance scale
PORIGIN	Importance of country of origin	Five-point importance scale
PATTRIB	Importance of product features	Five-point importance scale
Store selection criteria		
SQUAL	Importance of merchandise quality	Five-point importance scale
SSERV	Importance of service	Five-point importance scale
SLOCATE	Importance of location	Five-point importance scale
SVARIETY	Importance of merchandise variety	Five-point importance scale
SPRICE	Importance of price level	Five-point importance scale
SPL	Importance of store brands	Five-point importance scale
SATMO	Importance of store atmosphere	Five-point importance scale
Individual characteristics		
ISEX	Gender	Woman, man
IFAM	Family status	Married, single
IINCOME	Income level	Four income categories
IEDU	Education level	Basic, college, university
IAGE	Age	Five age groups

Note: [a] 1 = not at all important; 5 = very important

importance attached to brand name, price and country of origin is moderate.

The overall evaluation of the above criteria and, in particular, the high values of both product quality and product features suggest that customers are mostly concerned with essential properties and characteristics of the product and pay considerably less attention to dimensions of the product such as packaging or country of origin.

A consistent pattern is detected in the lower part of Table VI, which reports the store selection variables. We see that merchandise quality and merchandise variety are the most important store choice criteria. Again, product-related criteria seem to dominate the consumer decision making in both brand and store choice processes.

It is worth noting that customers attach relatively high importance to store location, which highlights the significance of proximity in grocery store choice (Clarkson *et al.*, 1996; Clarke *et al.*, 1997; Hernandez and Bennison, 2000; Kim and Jin, 2001). The importance of location is particularly interesting in this case, because the data pertain to a metropolitan area with a quite dense network of grocery stores. Location still counts as people seek the maximum convenience in grocery shopping (cf., Wileman, 1993). In addition, the heavy traffic and incomplete system of urban transportation of the area place more emphasis on the proximity criterion. Finally, store atmosphere is a core element of store image, whose evaluation in the present survey is notably high (Ingene, 1984; Donovan *et al.*, 1994; Turley and Milliman 2000).

Of particular note is the very low importance of store brands as a store choice criterion. This variable not only exhibits an asymmetric distribution over its values (Table VI) but also has the smallest mean importance score among all store choice criteria. This result is incompatible with the prominent role of store brands in other, greater European markets such as the UK, Germany, and France (Baltas, 1999; Burt, 2000). In the examined market however, the retail brand concept is underdeveloped. This can be partially attributed to the lower concentration of the Greek grocery sector, in which the five largest chains have less than half of the market. Consequently, most customers do not patronise a store because of its private labels.

To proceed further, we must explore possible relationships in the survey data. However, it is

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Table VI Importance of product and store choice criteria

	Product choice criteria							Store choice criteria					
	Brand name (%)	Product price (%)	Product quality (%)	Packaging (%)	Country of origin (%)	Product features (%)	Store brands (%)	Price level (%)	Merchandise quality (%)	Merchandise variety (%)	Store atmosphere (%)	Service (%)	Location (%)
Very important	17	22.5	57.5	9.5	28.0	41.5	9.5	34.5	61.0	43.5	39.0	55.5	43.0
Fairly important	29.0	29.0	36.0	24.0	36.5	39.0	17.0	34.5	33.0	33.5	33.5	30.5	33.0
Neutral	28.0	35.0	5.5	27.0	9.0	11.5	26.5	13.0	3.5	12.0	18.0	9.0	11.0
Not so important	15.0	8.0	1.0	19.5	13.0	5.5	16.5	11.0	1.5	7.5	6.5	2.0	7.5
Not at all important	11.0	5.5	0.0	20.0	13.5	2.5	30.5	7.0	1.0	3.5	3.0	3.0	5.5
Mean value	3.26	3.55	4.50	2.84	3.53	4.12	2.59	3.79	4.79	4.06	3.99	3.46	4.01

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evident from the foregoing that the variables are not measured in a strict quantitative fashion. In addition, the variables exhibit different metric properties. More specifically, the two groups of importance variables have an interval or ordinal operationalisation while some individual characteristics (e.g. gender) have a purely qualitative character. In addition, the nature of the examined population has led to non-probability sampling procedure, which limit the applicability of parametric statistical techniques.

In view of the mixed metric properties of the data, we turn to optimal scaling methods that deal with non-metric data (e.g. Perreault and Young, 1980; Tenenhaus and Young, 1985). In particular, the principal components procedure by means of alternating least squares (PRINCAL) permits the simultaneous determination of relationships between and within the three sets of non-metric variables (e.g. Tagg, 1997). The PRINCAL model was calibrated on the survey data and converged to a two-dimensional solution, which is presented in Figure 1.

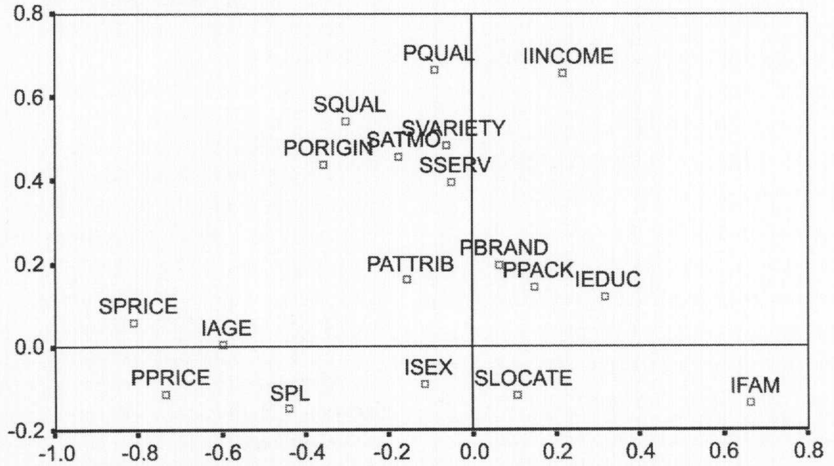
In Figure 1, the position of a variable is determined by its loadings on the two dimensions of the map. Interestingly, the plot shows that the horizontal axis is correlated mainly with variables such as SPRICE, PPRICE, IAGE, SPL and IFAM. This suggests that the importance of price in store choice, the importance of price in brand choice, the importance of store brand lines in store choice and the age and the family status of the consumer are correlated.

This pattern is quite reasonable. People who look for economical brands (PPRICE) may also tend to patronise economical stores (SPRICE). In addition, people with family responsibilities (IFAM) and older people (IAGE) may face tighter budget constraints, which increase the importance of price in their brand and store choice behaviour. This might be particularly true in Greece, where the disposable income of pensioners is often relatively low. It is worth noting that elderly people form a quite important consumer segment, given the steady ageing trend (c.f. Kouremenos and Avlonitis 1995).

Proceeding further in the same vein, we note that the vertical axis is correlated mainly with variables such as PQUAL, SQUAL, IINCOME, SVARIETY, and SATMO, which are clustered together. This indicates that choice criteria such as product quality, merchandise quality, merchandise variety and store atmosphere are associated. In addition, higher importance to such characteristics is attached by people with higher income (IINCOME), who can afford to overlook price considerations.

Loosely speaking, the map reveals a fundamental dichotomy in the behaviour of the examined individuals by detecting two main groups of behavioural and demographic variables, which reveal economy and quality seeking behaviour respectively. This two-tier scheme may be simplistic but detects essential patterns in the brand and store selection behaviour of the Greek consumers. This interpretation is observationally equivalent to the consequences of income polarisation in European Union countries discussed by Leeflang and Raaij (1995).

Figure 1 Derived joint space of variables



On closer inspection, we see that gender is located to the low left quadrant, implying that when choosing brands or stores Greek women tend to pay relatively more attention to economic criteria. Similarly, education is located in the top right quadrant, suggesting that education is negatively associated with price-related decision criteria, mainly because university and college graduates tend to get greater salaries.

Of equal interest is the SPL variable, which reflects the importance of store-brand lines as a store-selection criterion. The SPL variable is located to the low left quadrant and close to price-related criteria, implying that private-label products are seen as economical alternatives to manufacturer brands (Baltas and Doyle, 1998). This reflects the state of store brands in Greece, where such products are sold on considerably lower prices and premium private label lines are extremely rare.

Concluding comments

In this paper, we have addressed the importance of brand choice criteria, store selection criteria, and the role of shopper characteristics by collecting and analysing data on the Greek grocery sector.

The consumer survey revealed that product-related criteria are the most important in both brand and store choice processes. Brand quality and attributes dominate the brand choice process, while merchandise quality and variety determine store patronage.

Interestingly, customers attach considerable importance to store location, despite the density and the relatively small distances that characterise the examined retail structure. This is attributed to persistent shopping habits and overall high transportation cost.

In addition, private label is found to be a store selection criterion of low importance for grocery shoppers, since the store brand concept is rather underdeveloped and not used as a means of store differentiation.

We have also explored the relationships in the survey data by means of optimal scaling methods, which have the attractive feature of permitting the simultaneous analysis of different groups of non-metric variables, without invoking any parametric assumptions that require strict random sampling techniques. Several patterns have been identified. In particular, the results reflect an antithesis in economic and non-economic choice criteria, which are also related to specific characteristics of the decision maker.

For researchers, the present findings shed some light on this under-researched area and lay the groundwork for future work. For practitioners, the survey provides primary information about the specific grocery market, which might be instructive for retailers and manufacturers alike. The present findings also reveal the need for research in specific European markets about which very little is currently known.

Note

1 For an extensive discussion of the nature and scale of the changes in Greek retailing see Bennison and Boutsouki (1995).

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