A demographic analysis of brand perceptions: The case of a private label breakfast cereal in South Africa

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Keywords

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Abstract

Private label brands, consisting of merchandise sold exclusively through a particular retail chain, are growing in prominence throughout the world. Although highly advantageous to retailers, these brands exhibit pitifully low penetration rates in South Africa and are typically seen as being inferior to national/manufacturer brands. This study considers three key demographic variables and the impact of these on consumer responses pertaining to the perceptions of a private label brand. In this respect, a range of responses to PLB characteristics are assessed, focusing on perceived quality, risk, relative price and value. Furthermore, antecedents affecting perceived quality, and a moderator variable assessing the impact of entrenched loyalty to national brands, are included in the mix. Lastly, willingness to buy is also probed. The findings reveal that high income households shun PLBs, as do younger adults of 21 to 40 years of age. In contrast, consumers aged 60 and above appear to embrace these brands. There was a negligible difference recorded by the gender divide, although females appeared more inclined to favour private label merchandise. These results may assist retailers in better targeting predisposed consumers, particularly through customisable channels such as Facebook and Google Mail advertisements.

1. Introduction

Private label brands, consisting of merchandise sold exclusively through a particular retail chain, are growing in prominence throughout the world. Retailers are incentivised to sell these brands for a plethora of reasons including margin enhancement, facilitating customer choice and the fostering of customer loyalty (Kumar & Steenkamp, 2007). However, the acceptance of these brands is not without consumer reservation. In South Africa, private label brands exhibit pitifully low penetration rates and are typically seen as being inferior to national brands (Beneke, 2010).

This particular study considers a range of pertinent factors that consumers take into consideration when contemplating the purchase of private label breakfast cereals. The focus was placed on breakfast cereal due to its ubiquitous availability in supermarket store, high rate of sale, and mass consumption within South Africa (Euromonitor, 2013). It also conforms with the normative characteristics of FMCG private labels, being low cost, low risk and low involvement in nature (Kumar & Steenkamp, 2007). More specifically, this study investigates whether key demographic segments of consumers vary in their perspectives of, and propensity towards purchasing, such brands.

2. Research Statement

This study attempted to consider demographic nuances with respect to the perceptions of a private label branded breakfast cereal in South Africa. A number of different attributes were probed, including perceived product quality, perceived risk in purchasing the brand, perceived

relative price (relating to the differential between the brand and mainstream competitors on shelf), as well as the consumer's perception of value and his/her overall willingness to buy the private label merchandise. Moreover, a multitude of external factors influencing the consumer's view of the PLB merchandise were also captured and subjected to the same form of analysis. In this respect, segmentation clusters of age group, gender and household income were a priori defined and compared against each other using the attributes specified above.

3. Literature Review
3.1 The Formation of Perceived Value and Willingness to Buy Private Label Brands

At the heart of this research is the conceptualisation of perceived product value by Sweeney *et al* (1999). This theorisation has further been substantiated and validated by the works of, inter alia, Kwon and Oh (2008), Sanchez-Fernandez and Iniesta-Bonillo (2007), as well as Snoj*et al* (2004). This suggests that the consumer's perception of value is preceded by quality considerations, the pricing of the merchandise and the level of risk involved. These antecedent factors are processed to formulate a notion of perceived value, which then has a direct effect on the consumer's willingness to buy the brand in question. This study probes these constructs within this causal chain at a foundation level, but augments it by considering additional factors influencing the perceived quality of the merchandise (namely store image, familiarity with private label merchandise, and in-store extrinsic cues) and also taking loyalty to existing national brands into consideration as a potential impediment in the final phase of the buying decision process. These particular constructs, and the associated scale items, are profiled in Table 1.

Table 1: An Overview of the Research Constructs

Constructs and Scale Items	Adapted from
Questions 15 to 16: Willingness to Buy *I would seriously consider buying these products.* *I will probably purchase these products at the store.* *There is a strong likelihood that I will purchase this merchandise.*	Diallo (2012) Sweeney *et al*(1999) Dodds*et al* (1991)
Questions 12 to 14: Perceived Product Value *This merchandise represents good value for money.* *At the price shown, this merchandise is economical.* *These products are a good buy.*	Sweeney *et al*(1999) Dodds*et al* (1991)
Questions 2 to 4: Perceived Relative Price *This merchandise is reasonably priced compared to mainstream cereal brands.* *This merchandise is more affordable than mainstream cereal brands.* *These are well priced products.*	Beneke *et al*(2013) Sweeney and Soutar (2001)
Questions 5 to 7: Perceived Product Quality *This merchandise is defective in some way.* *The quality of these products does not last.* *The merchandise is of low quality.*	Bao*et al* (2011) Sweeney and Soutar (2001) Grewal*et al*(1998)
Questions 8 to 11: Perceived Risk *The quality of this merchandise is suspicious.* *The ingredients used in the manufacturing of these products are suspicious.* *Buying this merchandise is not worth the money spent.* *Buying this merchandise is not a wise way to spend one's money.*	Diallo (2012)
Questions 24 to 28: Store Image *The store offers high levels of service and convenience.* *The atmosphere of the store is conducive to shopping.* *The physical environment is visually appealing.* *The store enjoys a favourable reputation.* *The store sells products that I would want to buy.*	Reardon *et al*(2011) Semeijn*et al*(2004) Chowdhury*et al* (1998)

Questions 18 to 23: In- and Out-of-Store Influences
Familiarity with Private Labels
    I feel inclined to talk about these products with family, friends and colleagues.
    I am aware of advertising of these products in magazines & newspapers and on
        television and radio.
    I have experience in buying and using such products.
In-store Extrinsic Cues
    Attractive packaging makes the product more appealing to me.
    In-store promotions act as an enticement to buy the product.
    I am more likely to buy noticeable and conveniently placed products on the
        supermarket shelf.
	Levy and Gendel-Guterman (2012)
	Fuchs *et al* (2010)
	Zhou *et al* (2010)
	Pham and Avnet (2004)
	Bloch *et al* (2003)
	Richardson *et al* (1994)

Questions 29 to 32: Loyalty to National Brands (e.g. Kellogg's)
    I consider myself loyal to Kellogg's breakfast cereal.
    Kellogg's would be my first choice of breakfast cereal.
    I would not buy other brands if Kellogg's is available at the store.
    I am willing to pay a higher price for Kellogg's than I would for other brands.
	Moreau *et al*(2011)
	Yoo*et al* (2000)

3.2 Pursuing Segmentation Analysis – A Consideration of Demographic Nuances

In postulating sub-group level analysis, it is important to note that many consumer based studies probe for differences in beliefs, mindsets, risk profiles and purchasing behaviour at the demographic level (Lin, 2002; Beane& Ennis, 1987; Slama&Tashchian, 1985). This is often achieved according to gender, age, education level, as well as socio-economic status (Kotler& Keller, 2011; Wedel & Kamakura, 2000). Segmenting the sample in this manner can therefore lead to interesting and valuable findings, which might otherwise have remained undiscovered had demographic segmentation not been applied (Lin, 2002; Slama & Tashchian, 1985).

There are numerous instances in the academic literature where segmentation has been effectively applied to demographic groupings in order to extract nuances from within the sample. Examples of previous studies addressing this issue include the following:

- Beneke *et al*(2013) scrutinised the effect of core demographics on perceived risk in the purchasing of PLBs in South Africa.
- Sethuraman and Cole (1999) investigated whether annual household income and family size affected private label consumption patterns in the United States.
- Ricciuto*et al* (2006) considered the socio-demographic influences on food purchasing among Canadian households.
- Sorce*et al* (2005) investigated age in online buying behaviour in the United States of America.
- Shiu and Dawson (2001) applied demographic segmentation to shoppers in traditional markets and supermarkets in Taiwan.
- Laroche*et al* (2000) looked at gender differences in in-store information search strategies in the Chinese gift market.

Furthermore, Stafford (1996) pondered demographic discriminators of service quality in the banking industry in the United States and, in a very similar study, Alfansi and Sargeant (2000) considered the relationship between demographics and desired customer benefits in the Indonesian banking sector.

Thus, there appeared to be a wide-ranging precedent in applying demographic segmentation to cohorts of consumers within the sample. It was thought that this micro level analysis may therefore identify individual differences at a sub-group level, which may prove

beneficial in understanding the nuances of consumer behaviour and, ultimately, adoption of PLBs in South Africa.

4. Methodology
4.1 Data Collection
The mall-intercept method was used to reach respondents within the retail trading environment. A three-tier hybrid sampling technique was implemented. First, shopping centres that were medium to large in size, and frequented by middle class consumers, were identified. A shopping mall in each of the major shopping precincts was then selected on a judgment basis. Second, a different day of the week to collect samples from each mall was randomly determined. Third, a systematic sample was drawn from each of the designated malls on the chosen day.

The questionnaire was administered within the supermarket shopping aisles containing breakfast cereal by two trained field workers. This method of distribution was fortuitous in that it allowed for any misunderstandings to be addressed during the deployment process.

4.2 Data Analysis
At the outset of the analysis process, the data was tested for normality. Based on Kolmogorov-Smirnov and Shapiro-Wilktests, the data was found not to comply with normality standards. Hence, non-parametric tests were utilised. In this respect, the Kruskal Wallis test (the non-parametric equivalent of ANOVA) was utilised for the variables of age and household income, where there were more than two categories of response. The Mann-Whitney U-Test (the non-parametric equivalent of independent sample t-tests) was used in the case of gender (Pallant, 2013). The reliability of all constructs was found to be adequately, with Cronbach Alpha's ranging from 0.63 to 0.94.

4.3 Operational Definition of 'Middle Class'
Considering the works of Visagie (2013), Statistics SA (2013) and the Bureau of Market Research (2013), a primary classification of 'middle class' in South Africa was derived on the basis of household income. In this respect, an interval of Rand 8 000 to 40 000 per month was specified and used as a filter question at the outset of the questionnaire.

4.4 Composition of the Sample
The realised sample consisted of 482 respondents throughout the Cape Town metropolitan area. Three distinct segmentation variables were collected – age, gender and household income. The sample was skewed in favour of female respondents (57.3 percent versus 42.7 percent male respondents), younger individuals (particularly 21 to 40 year olds, constituting 75.1 percent of the sample) and middle income (i.e. R 10 001 to R 20 000) consumers who comprised just over half of the respondents (50.3 percent) surveyed.

5. Results
In this section of the paper, segmentation by age, gender and household income is considered, using the analytical techniques described above.

In order to understand if perceptions related to a consumer's notion of product value and the antecedents thereof (namely perceived risk, perceived relative price, perceived relative price, etcetera) were subject to fluctuations on the basis of demographic variables, an item-by-item analysis was undertaken. Added to this, the influence of loyalty to national brands and the consumer's willingness to buy the brand under consideration were captured and analysed in a similar vein.

The following hypothesis was postulated to ascertain the outcome of the extent to which the demographic classification influenced the response received from the survey participants:

H_0: *The medians across all segmentation groups are equal.*
H_A: *At least one of the medians differs significantly from the other segmentation groups.*

The results are presented in Tables 2, 3 and 4, with significant values (at the five percent level) highlighted in bold text. Figures 1, 2 and 3 depict the aggregate scores for each question according to the a priori segmentation variables of household income, gender and age.

## 5.1 An Analysis of Age Group Segmentation

Table 2: Kruskal Wallis Test by Age Group Segmentation

	Chi-Square	Degrees of Freedom	Significance
Question 2	10.967	4	**.027**
Question 3	8.122	4	.087
Question 4	10.485	4	**.033**
Question 5	38.453	4	**.000**
Question 6	51.405	4	**.000**
Question 7	42.486	4	**.000**
Question 8	53.678	4	**.000**
Question 9	45.340	4	**.000**
Question 10	27.744	4	**.000**
Question 11	25.242	4	**.000**
Question 12	15.165	4	**.004**
Question 13	10.000	4	**.040**
Question 14	15.112	4	**.004**
Question 15	18.686	4	**.001**
Question 16	22.990	4	**.000**
Question 17	27.555	4	**.000**
Question 18	27.255	4	**.000**
Question 19	32.407	4	**.000**
Question 20	18.653	4	**.001**
Question 21	59.863	4	**.000**
Question 22	78.260	4	**.000**
Question 23	50.995	4	**.000**
Question 24	23.809	4	**.000**
Question 25	8.860	4	.065
Question 26	19.436	4	**.001**
Question 27	25.176	4	**.000**
Question 28	12.384	4	**.015**
Question 29	46.969	4	**.000**
Question 30	42.990	4	**.000**
Question 31	25.266	4	**.000**
Question 32	29.927	4	**.000**

Table 2utilised the Kruskal Wallis test to ascertain whether age played a role in determining a consumer's response. In all cases, except for question three, differences between age cohorts were found to exist. Thus, the null hypothesis of equality can be safely rejected at the five percent significance level and the conclusion reached that age <u>does</u> indeed influence how consumers responded to the questions posed.

The aggregate scores for each question, mapping the general responses from individuals in the respective age segments, are represented by the series of lines in Figure 1.

Figure 1: Age Group Profile by Aggregate Item Scores
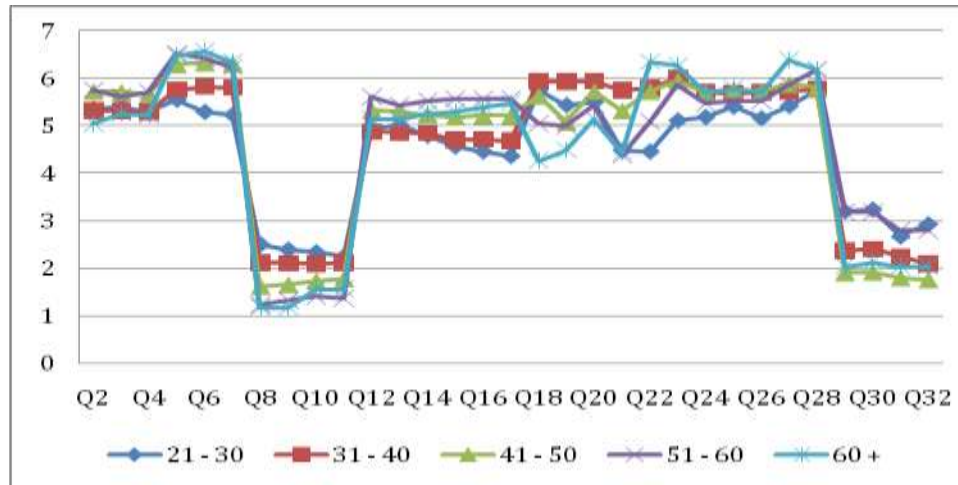
The response patterns for the different age segments follow a broadly consistent trajectory. Yet, it is abundantly clear that nuances between the different cohorts remain. Respondents aged upwards of 60 generally perceived the private label merchandise in a favourable light, revealing some of the highest levels of quality, lowest levels of risk, and the highest performance ratings of the chain of retail stores. They were also amongst the least likely to favorite national brand as their preferred choice of breakfast cereal. Conversely, the mirror opposite response mapping was observed within the 21 to 30 age group, suggesting that younger consumers are considerably less enthusiastic about these PLBs. Indeed, it is interesting to note that the younger cohorts of age 21 to 30 and age 31 to 40 score the lowest on perceived product quality and the highest on perceived risk in buying private label branded breakfast cereal. Accordingly, both of these cohorts score the lowest amongst all age brackets with respect to perceived value and willingness to buy. It therefore appears as though younger consumers may have an inherent inclination towards purchasing national branded breakfast cereal, as opposed to private label alternatives.

As stated in the household income segmentation analysis, the results should be interpreted with some degree of caution due to the small sample sub-sets of respondents aged 51 to 60 (4.4 percent) and those aged upwards of 60 (4.8 percent). As noted previously, it is therefore possible that the responses of a few individuals may serve to skew results in an exaggerated manner.

5.2 An Analysis of Household Income Segmentation
Table 3: Kruskal Wallis Test by Household Income Segmentation

	Chi-Square	Degrees of Freedom	Significance
Question 2	2.552	3	.466
Question 3	2.166	3	.539
Question 4	2.946	3	.400
Question 5	14.649	3	**.002**
Question 6	19.759	3	**.000**
Question 7	22.322	3	**.000**
Question 8	8.539	3	**.036**

Question 9	9.927	3	**.019**
Question 10	8.656	3	**.034**
Question 11	6.431	3	.092
Question 12	0.736	3	.865
Question 13	0.939	3	.816
Question 14	5.538	3	.136
Question 15	4.198	3	.241
Question 16	7.064	3	.070
Question 17	8.863	3	**.031**
Question 18	4.704	3	.195
Question 19	11.880	3	**.008**
Question 20	17.578	3	**.001**
Question 21	51.224	3	**.000**
Question 22	60.896	3	**.000**
Question 23	21.206	3	**.000**
Question 24	10.838	3	**.013**
Question 25	12.046	3	**.007**
Question 26	24.207	3	**.000**
Question 27	12.738	3	**.005**
Question 28	10.261	3	**.016**
Question 29	46.664	3	**.000**
Question 30	48.557	3	**.000**
Question 31	19.496	3	**.000**
Question 32	34.678	3	**.000**

Table 3also made use of the Kruskal Wallis test in order to ascertain whether household income played a role in determining a consumer's response. In the vast majority of cases (22 out of the 32 instances or 68.8 percent), household income was found to be a noteworthy factor. Thus, the null hypothesis of equality can be safely rejected at the five percent significance level and the conclusion reached that household <u>does</u> indeed influence how consumers responded to the questions posed.

The aggregate scores for each question, mapping the general responses from individuals in the respective household income segments, are represented by the series of lines in Figure 2.

Figure 2: Household Income Profile by Aggregate Item Scores
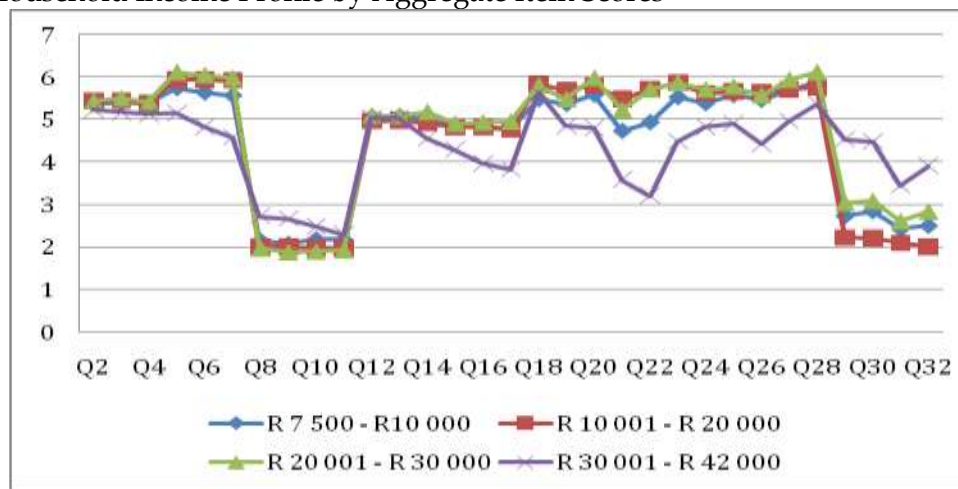
It may be seen that the profiles for three of the four cohorts (Rand 7 500 to Rand 10 000; Rand 10 001 to Rand 20 000; Rand 20 001 to Rand 30 000) follow a very similar trajectory. However, these digress quite substantially from that of the Rand 30 001 to Rand 42 000 cohort.

The highest income group appears to exhibit a more negative attitude towards private labels than the other groups. With respect to relative price, value, quality and willingness to buy, Rand 30 001 to Rand 42 000 respondents were more pessimistic in their views of the merchandise under consideration. They also exhibited a higher risk profile, instead favouring NBs such as Kellogg's, the category leader. Furthermore, their views of the retailer were considerably less flattering than those recorded from the other cohorts.

However, this should be interpreted with caution as the Rand 30 001 to Rand 42 000 segment comprises a rather small percentage of the sample (only 7.7 percent). It is therefore possible that the responses from a few individuals may serve to skew the results in an exaggerated manner.

5.3 An Analysis of Gender Segmentation

Table 4: Mann-Whitney U-Test by Gender Segmentation

	Mann-Whitney U	Wilcoxon W	Z Statistic	Significance
Question 2	24906.500	46227.500	-2.419	**.016**
Question 3	25463.500	46784.500	-2.031	**.042**
Question 4	24840.000	46161.000	-2.457	**.014**
Question 5	24241.500	45562.500	-2.929	**.003**
Question 6	25050.500	46371.500	-2.348	**.019**
Question 7	25256.000	46577.000	-2.201	**.028**
Question 8	25026.500	63252.500	-2.388	**.017**
Question 9	26017.500	64243.500	-1.695	.090
Question 10	25348.000	63574.000	-2.164	**.030**
Question 11	25117.000	63343.000	-2.329	**.020**
Question 12	24048.000	45369.000	-2.985	**.003**
Question 13	24486.000	45807.000	-2.681	**.007**
Question 14	24344.000	45665.000	-2.778	**.005**
Question 15	24204.000	45525.000	-2.851	**.004**
Question 16	24082.500	45403.500	-2.930	**.003**
Question 17	24838.000	46159.000	-2.417	**.016**
Question 18	24826.500	46147.500	-2.492	**.013**
Question 19	25621.000	46942.000	-1.929	.054
Question 20	24687.000	46008.000	-2.591	**.010**
Question 21	25506.500	46827.500	-1.978	**.048**
Question 22	26545.500	47866.500	-1.278	.201
Question 23	24654.000	45975.000	-2.592	**.010**
Question 24	26575.500	47896.500	-1.276	.202
Question 25	27203.500	48524.500	-.844	.399
Question 26	27019.000	48340.000	-.969	.332
Question 27	26658.000	47979.000	-1.220	.223
Question 28	26840.000	48161.000	-1.098	.272
Question 29	27273.000	65499.000	-.793	.428
Question 30	27024.500	65250.500	-.962	.336
Question 31	26750.000	64976.000	-1.162	.245
Question 32	26562.500	64788.500	-1.290	.197

In Table 4, the Mann-Whitney U-test, corroborated by the Wilcoxon test, were implemented to ascertain whether a significant difference was created by gender classification. As with Kruskal Wallis, the Mann-Whitney U and Wilcoxon tests are non-parametric in nature and thus able to process data that doesn't adhere to stringent standards of normality. In 19 of the 32 cases (59.4 percent), the items were found to be influenced by the gender of the respondent. Thus, the null hypothesis of equality can be safely rejected at the five percent level and the conclusion reached that gender does indeed influence how consumers responded to the questions posed.

The aggregate scores for each question, mapping the general responses from individuals in the respective gender segments, are represented by the series of lines in Figure 3.

Figure 3: Gender Profile by Aggregate Item Scores
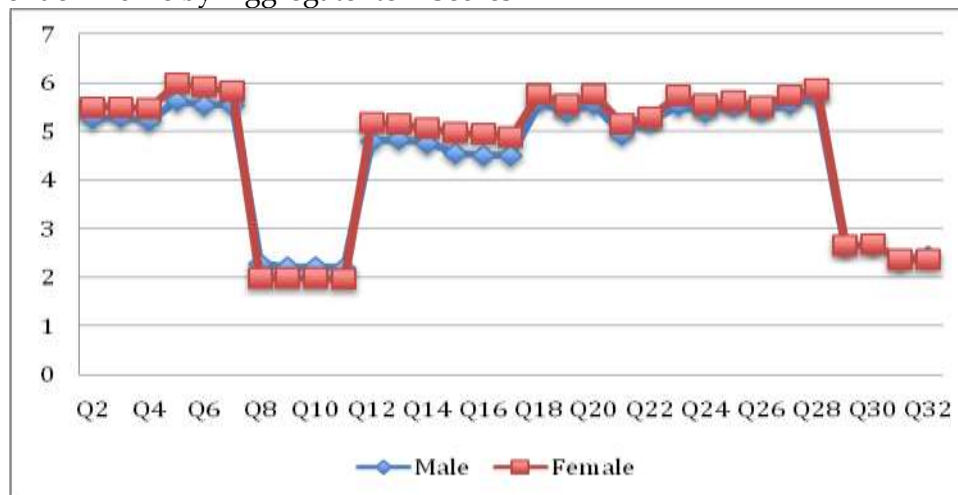
The response patterns for the two genders, although statistically different, appear somewhat similar in practice. However, with respect to relative price, value, quality and willingness to buy, female respondents were more assertive in their favourable views of the merchandise under consideration. They also exhibited a lower risk profile in buying these brands. Hence, their receptivity towards PLBs was deemed superior to that evidenced from their male counterparts.

6. Conclusions and Managerial Implications

This study sought to consider demographic nuances with respect to the perceptions of a private label branded breakfast cereal in South Africa. A number of different attributes were probed, including perceived product quality, perceived risk in purchasing the brand, perceived relative price (relating to the differential between the brand and mainstream competitors on shelf), as well as the consumer's perception of value and his/her overall willingness to buy the private label merchandise. Moreover, a multitude of external factors influencing the consumer's view of the PLB merchandise were also captured and subjected to the same form of analysis. In this respect, segmentation clusters of age group, gender and household income were defined and compared against each other using the attributes specified above.

Noteworthy differences were found to exist in this respect. In terms of household income, three of the four cohorts were found to exhibit very similar response patterns. The highest household income group deviated from this, appearing to possess a more negative attitude towards PLBs by rating the pricing, value and quality of the merchandise to be inferior to that claimed by the other income cohorts. Corresponding, their willingness to buy was lower. In terms of age, the cohorts exhibited broadly similar response patterns with respondents aged

upwards of 60 the most enthusiastic about the private label merchandise and the least enthusiastic about the category leader and prominent NB, Kellogg's. The converse scenario was found to exist in the case of younger consumers (21 to 30 and 31 to 40 age groups). Lastly, gender differences were less pronounced than household income and age differences, although female shoppers were deemed to be slightly more inclined to favour private label merchandise than their male counterparts.

As noted above, the demographic profile of customers was found to have an influence on the cognitive process leading up to a buying decision. This suggests scope for improvement in appealing to specific demographic clusters. Pensioners, for example, appeared positively predisposed to the notion of purchasing private labels, presumably on income grounds. Yet, affluent households seemed unreceptive to the idea of purchasing private labels and likewise for younger (age 21 to 40) working individuals and housewives/househusbands. The latter cohort provides a clear opportunity to shift perceptions. In keeping with the suggestions raised above, social media channels (e.g. Facebook and Twitter) and lifestyle, sports and even gaming magazines could be used to reach the younger portion of the target market. This is a notoriously difficult market segment with which to communicate as such individuals tend to shun traditional media such as newspapers, mainstream television channels and radio stations, instead preferring on-demand media and customised news feeds (Jordaan & Ehlers, 2009).

Effective targeting of predisposed consumer segments may allow for more efficient advertising spend. This is particularly relevant with respect to platforms that allow for customisable advertising content based on user profiles. For example, Facebook collects a considerable amount of personal data from its users and utilises this to match advertisements with specific individuals. Likewise for Google Mail (Gmail) using mail content and demographic segmentation marketing. Using the insights gleaned in the segmentation analysis, retailers of PLB breakfast cereal may optimise brand communication to specific cohorts. Further research (for example, the time of day of such purchases) may be used as an additional input to advertise to consumers in advance of the purchase event.

7. Limitations of the Study

This study concentrated on a private label branded breakfast cereal and analysed consumer responses to a raft of different product characteristics, segmented by demographic clusters. In so doing, a number of limitations were imposed. Firstly, a single product category (that of breakfast cereal) was considered. Secondly, a representative private label brand from within this product category was chosen. Thirdly, a particular set of influences (theorised antecedents of consumer perceived value and their ultimate impact on willingness to buy) was selected for testing, segmented by the pre-defined demographic clusters of age group, household income and gender. Fourthly, this was geographically contextualised by the South African retail sector, using middle class consumers as the target market. Results may well differ in other markets and may also be affected by the product category and choice of brand placed under the microscope.

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