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(37)

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POSITIONING IN THE RETAIL MARKET OF GROCERY AND CONSUMER GOODS (CASE STUDY: ROMANIAN MARKET)

BAKKAL VE TÜKETİCİ MALLARININ PERAKENDE PAZARINDA KONUMLANDIRMA (VAKA ÇALIŞMASI: ROMANYA PİYASASI)

ABSTRACT

The work is devoted to the development of practically oriented perception maps for positioning of retail networks in the set of attributes: price, recognizability, trust, convenience, quality, which allowed us to reasonably determine positioning by selected segments on the basis of objective marketing information. To do this, on the example of the Romanian market as a developing country, the authors conducted a market study of short-term demand, consumer behavior and motivation in the retail market of groceries and consumer goods by surveying 317 respondents to determine the frequency of store visits, priorities networks, motives, consumer risks and consumer loyalty. Also, authors conducted another market study of perception of retail chains by surveying 117 respondents to determine consumers attitude to existed retail chains. According to the results of the study, recommendations for positioning new networks in this market are provided. The results of the study can be used to develop strategies for positioning of retail chains in the consumer goods market while entering new markets in developing countries.

Keywords: *consumer behavior, retail market, perception, positioning.*

JEL Code: *M31.*

ÖZ

Çalışma, perakende ağlarının nitelikler kümesinde konumlandırılması için pratik odaklı algı haritalarının geliştirilmesine ayrılmıştır: fiyat, tanınabilirlik, güven, rahatlık, kalite, bu da nesnel pazarlama bilgileri temelinde seçilen segmentler tarafından konumlandırmayı makul bir şekilde belirlememize izin verdi. Bunu yapmak için, gelişmekte olan bir ülke olarak Romanya pazarı örneğinde, yazarlar, gıda ve tüketim malları perakende pazarında kısa vadeli talep, tüketici davranışı ve motivasyonu üzerine bir pazar araştırması yürüttüler. mağaza ziyaretleri, öncelikler ağları, güdüler, tüketici riskleri ve tüketici sadakati. Ayrıca yazarlar, tüketicilerin mevcut perakende zincirlerine karşı tutumunu belirlemek için 117 katılımcıyla anket yaparak perakende zincirlerinin algısı üzerine başka bir pazar araştırması yaptı. Çalışmanın sonuçlarına göre, bu pazarda yeni ağların konumlandırılmasına yönelik öneriler sunulmaktadır. Çalışmanın sonuçları, gelişmekte olan ülkelerde yeni pazarlara girerken perakende zincirlerinin tüketim malları pazarında konumlanmasına yönelik stratejiler geliştirmek için kullanılabilir.

Anahtar Kelimeler: tüketici davranışı, perakende pazarı, algı, konumlandırma.

JEL Kodu: M31.

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1. INTRODUCTION

The constant growth of the world economy and aggregate demand in general, leads to a permanent increase in the production of goods and services (Starostina, et al., 2021; Bilovodska et al., 2021). This leads to the intensification of competition, so the development of marketing strategies for businesses is becoming increasingly important. Increasing competition in any type of economic activity by increasing the number of competing firms leads to an increase in both the economy and social welfare.

In conditions of growing competition for the company, it is important to use the full range of economic knowledge: marketing, financial, investment and risk management, etc. to develop business strategies. Positioning in such conditions is the basis for effective competition.

Accordingly, this study is important for the formation of experience in management decisions for international companies, which will promote their development both within the national market and international markets.

The problems of the market research and positioning in the international markets are deeply presented in the works of scientists. Thus, A. Starostina proposed a theoretical and methodological approach to the integrated assessment of domestic and foreign markets (Starostina et al., 2018). P. Kotler and G. Armstong identified conceptual approaches to market analysis and the influence of competitive forces (Kotler et al., 2020). M. Palmie researched business models in retail (Palmie et al., 2022), T. Formanek and O. Sokol studied the location effects on brick-and-mortar stores (Formanek et al., 2022) etc. A. Dlihach and I. Gigauri studied perceptional mapping as a tool for brand positioning (Dlihach, n.d.; Gigauri, 2019). M. Boatswain empirically examined “positioning strategies to strengthen the perceptions of the positions of existing offerings, hereby offering a proactive and deliberate approach to positioning, beyond the scope of extant research on positioning strategies” (Boatswain, 2015). S. Diwan and B. Bodla studied “customer-derived positioning typology” (Diwan et al, 2011). C. Fuchs and A. Diamantopoulos introduced “a new approach for measuring positioning effectiveness that helps overcome some key limitations of extant approaches and serves as a support tool for positioning-related decisions” (Fuchs et al., 2012). P. Iyer, A. Davarib, M. Zolfagharianc and A. Paswand investigated “proactive and responsive market orientation types support the development of specific positioning strategies” (Iyer et al., 2019). S. Panda, K. Paswan, S. Mishra identified “the positioning strategies employed by franchisors and investigates their relationship with the franchise fee structure, i.e. upfront fee and royalty rate” (Panda et al., 2018). However, the issue of forming an approach for positioning of retail networks according to the consumer behavior and motivation in the retail market needs research. So, the aim of the article is to develop practically oriented perception maps for positioning of retail networks based on the consumer motivations in the retail market of groceries and consumer goods. To achieve this goal, the following tasks were set: 1) to identify the motivation for the purchase by consumers (the frequency of store visits, priorities networks, motives, consumer risks and consumer loyalty, consumers attitude to existed retail chains); 2) to form perception maps for positioning of retail networks on the basis of objective marketing information; 3) to provide recommendations for positioning new networks in the consumer goods market while entering new markets in developing countries.

The research process uses general scientific and special methods of cognition of economic processes. Methods of scientific abstraction, generalization, dialectical method, method of systematization, comparison, analysis, synthesis, system approach, method of forming and testing hypotheses, the method of collecting and processing primary data, the method of developing search questions and questionnaires, the method of consumer questionnaires, and statistical methods of primary information processing are used.

2. Results and Discussion

2.1 Market research of short-term demand, consumer behavior and motivation

The intensification of competition and the growth of aggregate demand in the world requires the introduction of cost-effective tools for positioning retail companies and making decisions by companies according to the objective marketing information. A full-scale war with the Russian Federation continues in Ukraine. Due to hostilities, the rupture of logistics chains, and rocket fire, economic activity is very

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complicated. Thus, the country has a shortage of some products, there is a significant increase in prices for most products (along with the expected seasonal increase in agricultural prices, the war has a major impact), introduced state regulation of prices for basic necessities, physical shops and warehouses in parts of the country were destroyed. All this strongly influences consumer behavior and gives a significant degree of uncertainty. The situation is constantly changing, so the feasibility and possibility of conducting a study of consumer behavior in Ukraine is questionable. That's why the authors conducted market research for the Romanian market to obtain reliable information.

The first step in organizing market research is to formulate the aim and boundaries of the study (Bilovodska et al., 2020). The aim of this study is to investigate the short-term level of demand, consumer behavior and consumer motivations in the retail market of grocery and consumer goods.

Let's highlight the boundaries of the study:

Territorial: Bucharest.

Time: short-term period

Segment: people over 18 years.

Further necessary to develop a search list of questions for this research (Table 1).

Table 1: Search questions, hypotheses, and sources of information for the survey

№	Search question	Hypotheses	Sources of information
1	What factors are important for the consumer in the process of choosing a store?	Characteristics (range, price level, etc.) Brand image Before and after-sales service Loyalty programs Involvement consumers communication	Survey
2	How much consumers are spending on grocery for 1 person per month?	Up to \$100 \$100-200 \$200-300 \$300-400 \$400-500 More than \$ 500 USA	Survey, statistical information
3	What retail format is mostly visited by consumers?	Shop near the house Discounter Hypermarket Online store Mini -market Supermarket	Survey
4	How often is the consumer uses delivery services?	Every day Few times a week Once a week Every 2 weeks Less often than once every 2 weeks	Survey
5	How often does the consumer make purchases?	Every day Few times a week Once a week Every 2 weeks	Survey

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		Less often than once every 2 weeks	
6	How consumers are price sensitive?	Strongly Weakly	Survey
7	What is the level of loyalty in the market?	High Average Low	Survey
8	Forecast of market development	Growth Reduction Sustainability of the market	Secondary information
9	Growth of demand before the holidays?	Yes No	Survey
10	How important is the distance to the store?	Very important Important Not important It doesn't matter at all	Survey

№	Search question	Hypotheses	Sources of information
11	What characteristics of the store are important?	Brand image Trust to private labels Social responsibility Self-service availability Delivery availability Prices Loyalty program Range of home-made food Location Assortment Quality service Eco-friendliness Navigation in shop Support service	Survey
12	What are the main motives for choosing a store?	Profit Convenience Security Recognition Social affiliation	Survey
13	What consumer risks are important in this market?	The possibility of purchasing a substandard product or a product with an expired expiration date The possibility to receive rude treatment from the staff The possibility to overpay The possibility to obtain counterfeit goods The risk of imposing the type and style of consumer behavior The possibility of emotional dissatisfaction with the purchase The possibility of inconsistency between the image of the brand and its real qualities	Survey
14	What are the main perceptual determinants of consumer loyalty in the market?	Trust to the network Emotional satisfaction Confidence in choosing the best supermarket Emotional connection with the brand	Survey
15	What are the main behavioral determinants of consumer loyalty in the market?	Repurchases Recommendation to others Increased attention to the company's activities Reduced attention to competitors Reduced attention to rising prices (less price elasticity) Participate in various marketing activities of the	Survey

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company

To achieve the goal of the study, firstly we find the answers to the search questions №2 and №8.

To answer the question №2 "How much does the average consumer spend on food and necessities per 1 person per month?" we will use secondary information from the statistical services. This is data from the website of the National Institute of Statistics, as well as research data on online services salary explorer and Romania Experience. However, these are averaged data for the whole population, so for a more accurate answer, we include this question in the survey.

To answer question №8 "Forecast of market development" we will also use information from the websites of statistical services, as well as information from reports of global audit and consulting companies.

Based on this table, we will compile a survey for consumers using search questions №1-7, 9-15 (Table 1).

At the stage of approbation, the characteristics of the survey such as their comprehensibility and accessibility for filling in by respondents, clarity, and unambiguity of wording are checked, as well as the time required for filling in.

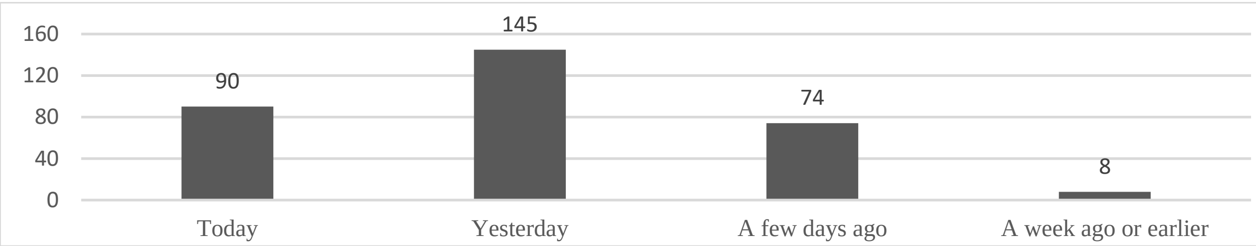
Thus, as a result of testing, it was determined that the questionnaire takes about 10 minutes. Respondents faced small problems in understanding the aim of the study, but this problem was solved during the filling of the questionnaire. In general, respondents commented on the questionnaires as clear and understandable.

It turned out that it is more convenient for respondents to answer questions on the topic than to choose judgments that correspond to their point of view on the topic. Also, when the questions are presented in tabular form, the respondents sometimes forget the context specified in the title of the table, ie lose the semantic background of the questions.

The analysis of the received questions and remarks allowed us to correct the text of the questionnaire.

So, as a result of the survey using the forms.app service we surveyed Bucharest residents aged 20 to 44 (average age 29) with an income above the poverty line (42% of men and 53% of women, the rest did not want to answer about their gender).

Graph 1: Respondents' answers to the question "When was the last time you bought food or non-food essentials?"



This is an introductory question that was added to engage respondents in the survey. The results showed that more than 97% of respondents made purchases less than a week ago, so they have fresh impressions and experiences from shopping.

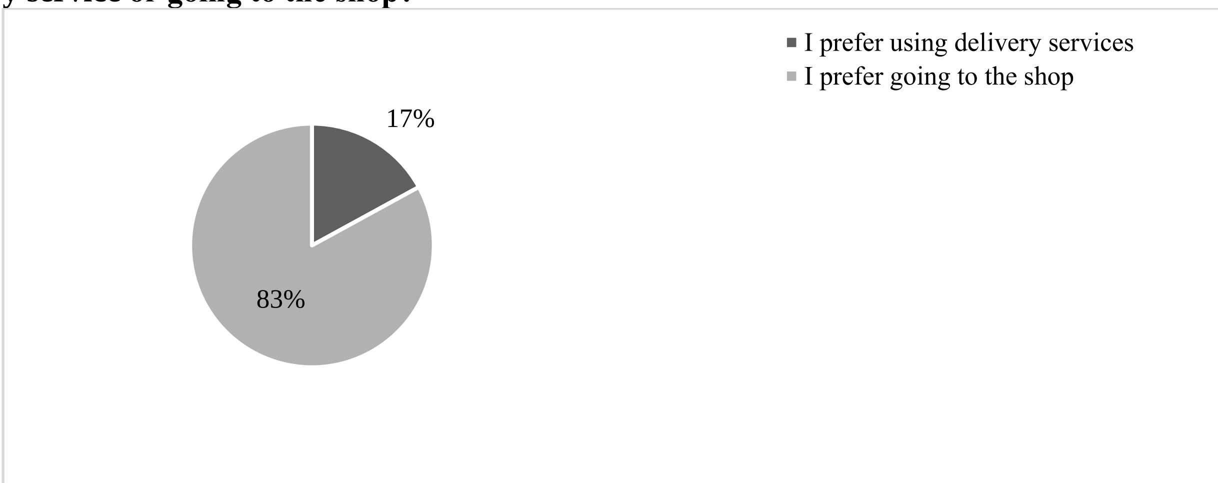
Graph 2: Respondents' answers to the question "On average, how do you evaluate services provided by retail chains?»

The survey showed that 67.5% of consumers are satisfied with the operation of retail chains, and 10% are unsatisfied.

Graph 3: Respondents' answers to the question "How often do you buy food or non-food essentials?"

As a result, more than 97% of consumers shop once a week or more. This shows that people spend a lot of time each week shopping.

Graph 4: Respondents' answers to the question "Do you usually prefer using a delivery service or going to the shop?"

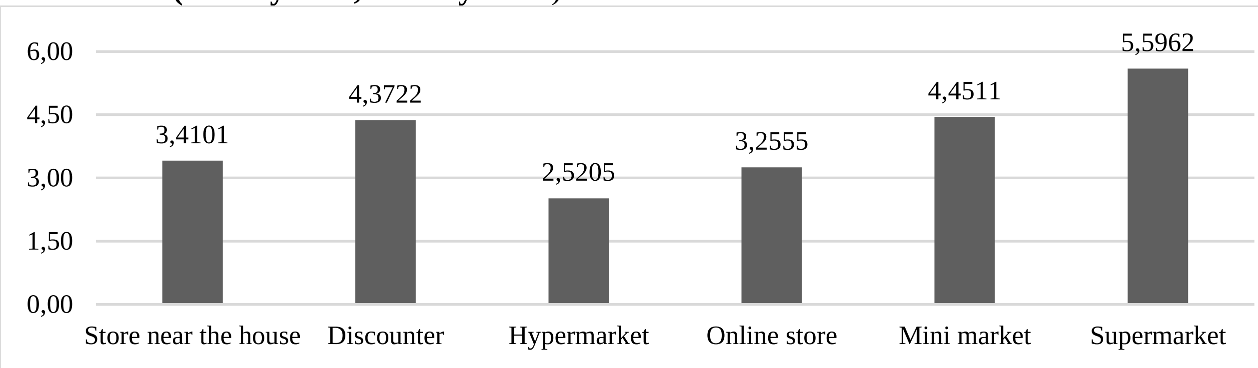


Almost 83% of consumers prefer shopping in the store, and only 17% prefer delivery. This is a consequence of a) satisfaction with the process, b) saving money on delivery, and c) habit. These hypotheses are investigated in more detail in the following questions.

Graph 5: Respondents' answers to the question: "On holidays you prefer"

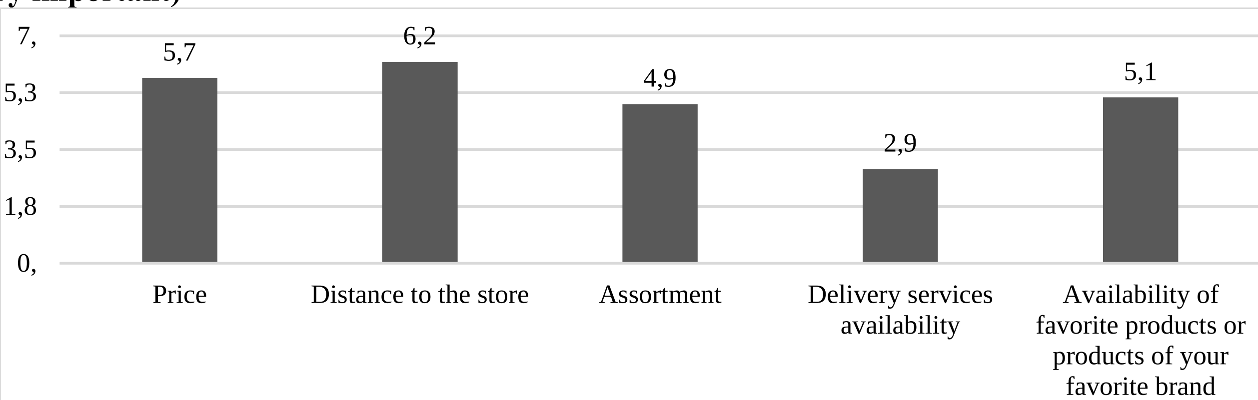
This is the answer to the search question №9: "Do consumers buy more before the holidays?". Thus, 65% of consumers prepare holiday meals, which leads to increased demand for food before the holidays.

Graph 6: Average rating of respondents' answers to the question “Evaluate how often you use these store formats (1 - very rare; 7 - very often)”



According to the results of the study, the most frequently visited formats are supermarkets, mini - markets, and discounters.

Graph 7: Average rating of respondents' answers to the question “Evaluate the importance of these characteristics for you when choosing a place to buy food or non-food essentials (1 - not important; 10 - very important)”



When researching hypotheses about the importance of the characteristics of the place for shopping, the most important was the distance to the store. The least important is the availability of delivery. Thus, Romanian consumers do not want to spend a lot of effort and time on the way to the store and shopping, but only a small part of customers use delivery.

Graph 8: Average rating of respondents' answers to the question “Evaluate the statement:" I almost always choose the nearest supermarket”

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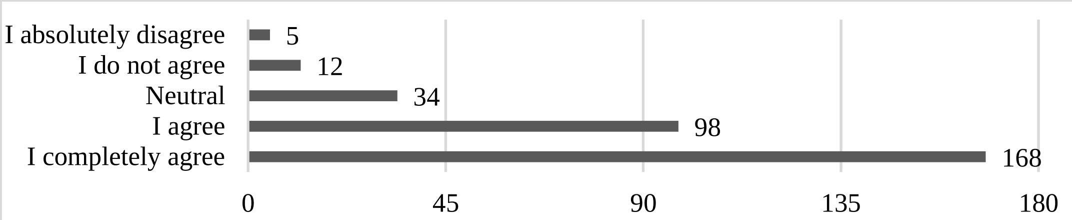
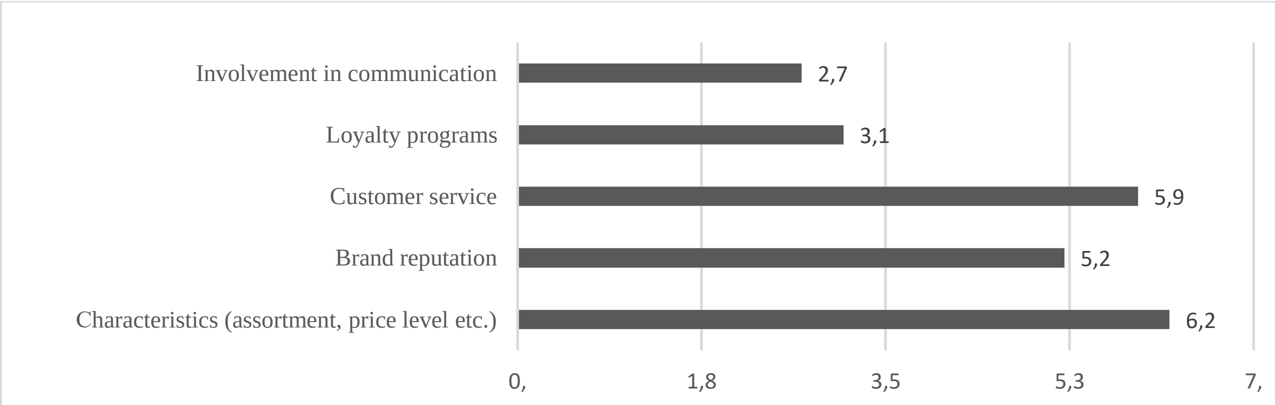


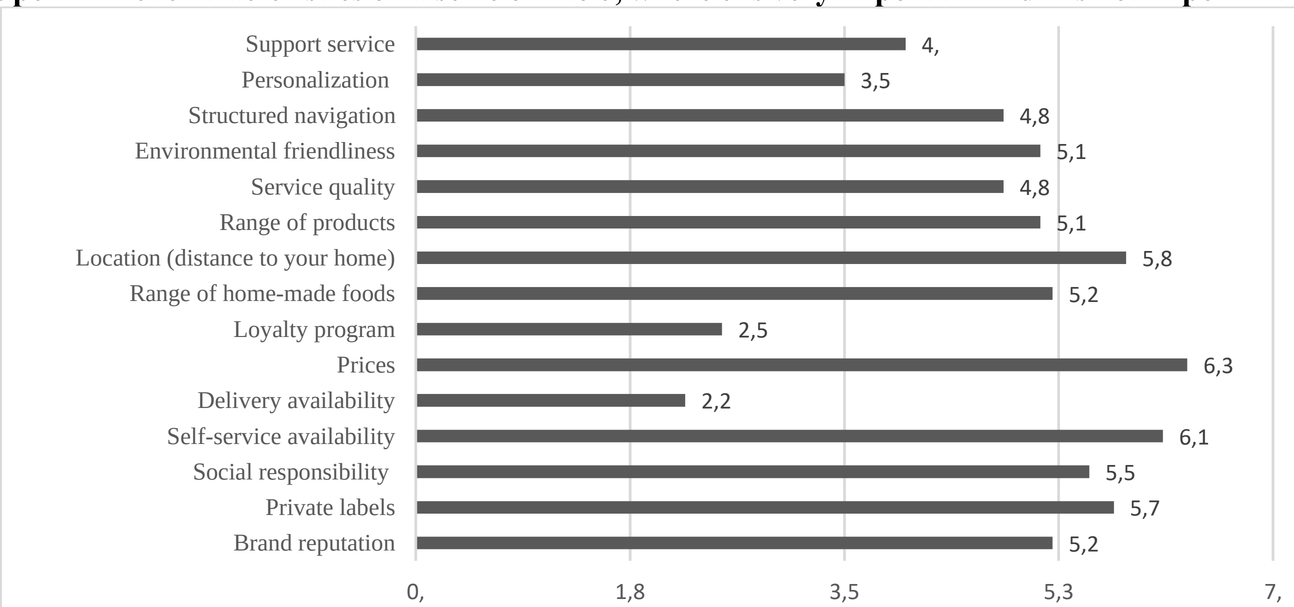
This is the answer to the search question №10: "How important is the distance to the store for the consumer?". Almost 84% of respondents said that the distance to the store is one of the main factors of choice.

Graph 9: Average rating of respondents' answers to the question “Evaluate the importance of different selection criteria for a supermarket on a scale of 1 to 7, where 7 is very important and 1 is not important”



It was found that among the marketing determinants of consumer loyalty are the characteristics of the service, and in second place - service, and third place - brand image.

Graph 10: Average rating of respondents' answers to the question “Evaluate the importance of these supermarket characteristics on a scale of 1 to 7, where 7 is very important and 1 is not important”



As for the characteristics, the most important in the choice were the level of prices, the availability of self-service, the distance to the store, the chain private labels and social responsibility.

Graph 11: Average rating of respondents' answers to the question “Please, rate motives that are important for you when choosing a supermarket on a scale from 1 to 7, where 7 is very important and 1 is not important”

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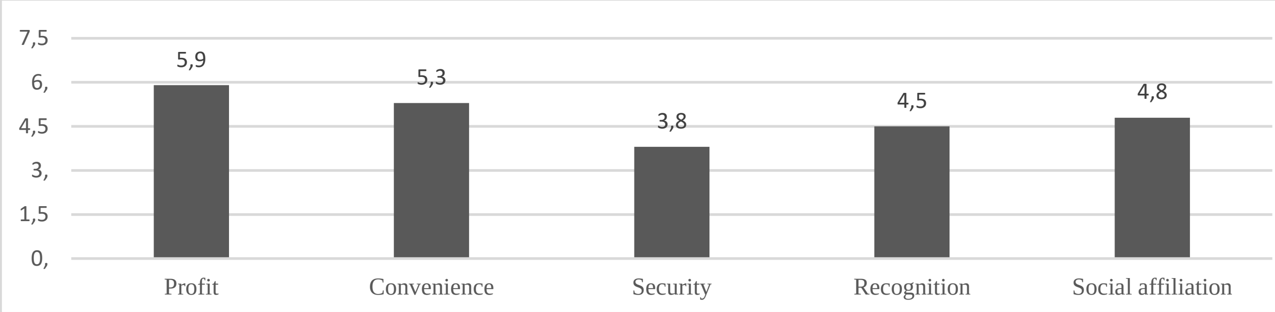
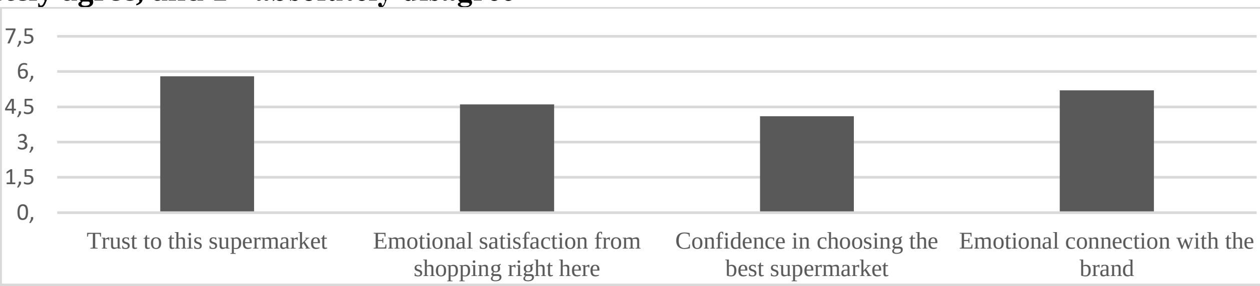


According to the results of the study, convenience and convenience dominate.

Graph 12: Average rating of respondents' answers to the question "Please, rate the consumer risks on a scale from 1 to 7, where 7 is very important and 1 is not important"

Regarding consumer risks, the hypothesis that only a few types are important (risk of negative impact on health, risk of poor service, risk of irrational use of financial resources) proved to be correct.

Graph 13: Average rating of respondents' answers to the question "Evaluate the statement:"I buy products in this supermarket because I have... ", on a scale from 1 to 7, where 7 is where 7 - completely agree, and 1 - absolutely disagree"



Among the perceptual determinants of loyalty, the most important are trust and emotional attachment.

Graph 14: Average assessment of respondents' answers to the question "Rate the statement on a scale from 1 to 7, where 7 - completely agree, and 1 - absolutely disagree "If I like the supermarket..."

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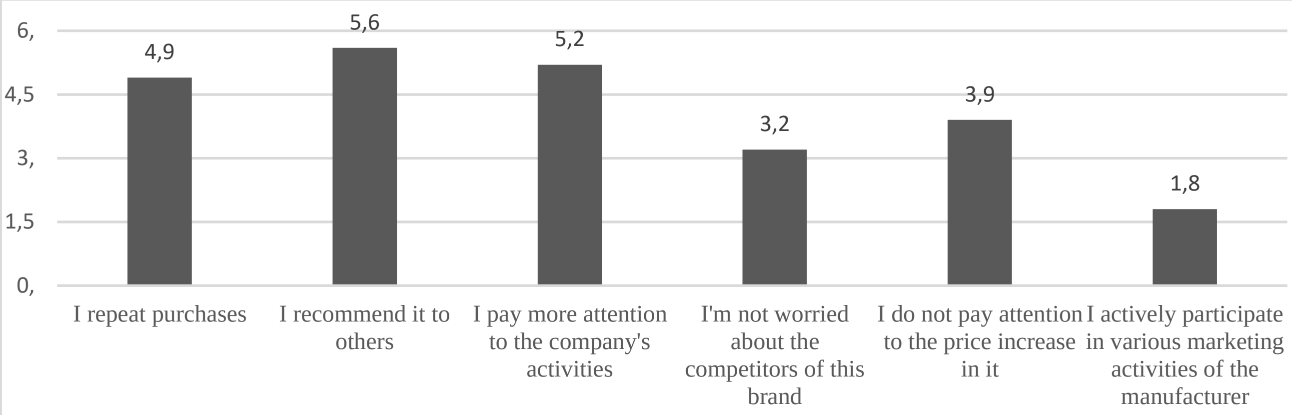
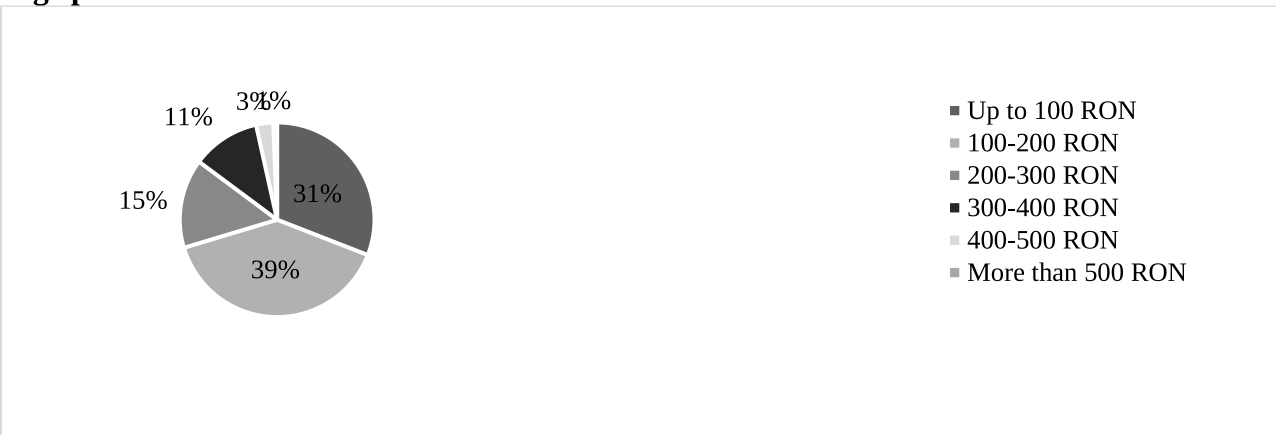


Among the behavioral determinants – are recommendations, attention to the company's activities, and repeated purchases.

Graph 15: Respondents' answers to the question "Please, estimate how much money you spend the average per week on food and non-food essentials"



The vast majority of consumers spend up to 200 RON per week. The average amount of money spent on products and necessities is about 170 RON per week and respectively 680 RON per month. That's about $ 150. USA (Finance, 2022) (exchange rate on 08.04.2022).

2.2 Perception mapping

The method of perception maps will be used to develop positioning. This approach involves the study of similarities and differences between brands based on certain attributes. The relative location of brands is determined by taking into account their assessments of individual attributes, taking into account the formation of a general assessment of the closeness between brands (Gigauri, 2019).

To develop perception maps, results of marketing research through a questionnaire on how consumers assess the characteristics of retail chains were used.

The study will be for the largest retail chains: Lidl Discount, Kaufland Romania, Carrefour Romania, Profi, MEGA IMAGE, Metro Cash & Carry, Auchan, Penny Market, Selgos Cash & Carry, and Cora (Ranking, 2022).

Will be investigated the following characteristics: price, recognizability, convenience, trust, assortment, and quality services.

Results are reflected graphically in the form of point charts with captions data, where the first number is the network number, the second is the result of the network axis X, third number – is the result of the network along with the axis Y. Numbers of researched networks:

1. Lidl Discount;
2. Kaufland Romania;
3. Carrefour Romania;

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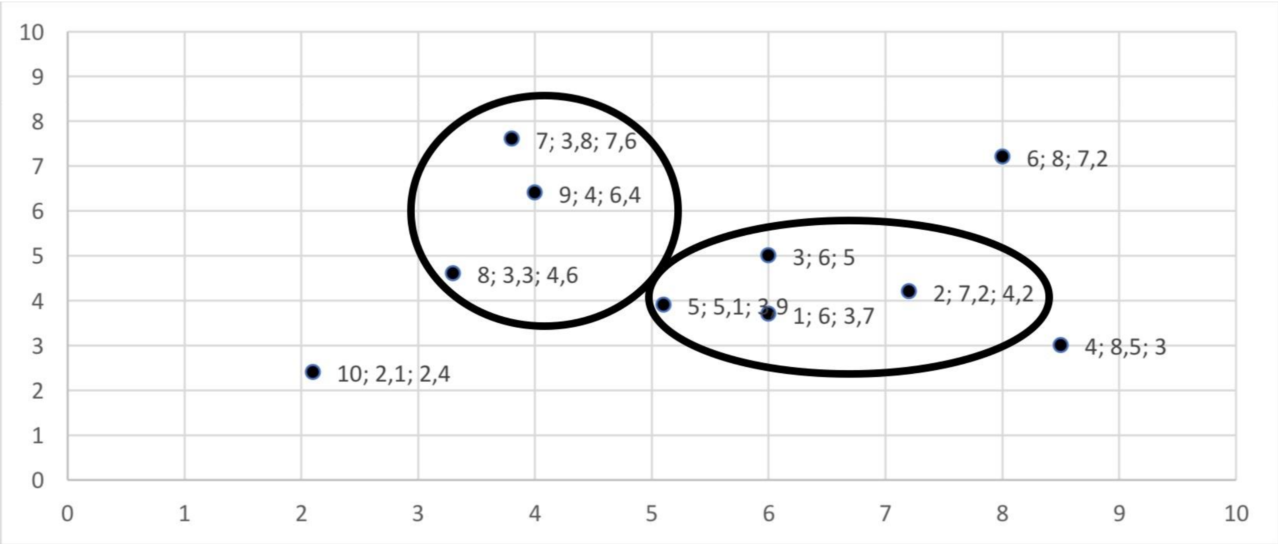
4. Profi;
5. MEGA IMAGE;
6. Metro Cash & Carry;
7. Auchan;
8. Penny Market;
9. Selgos Cash & Carry;
10. Cora.

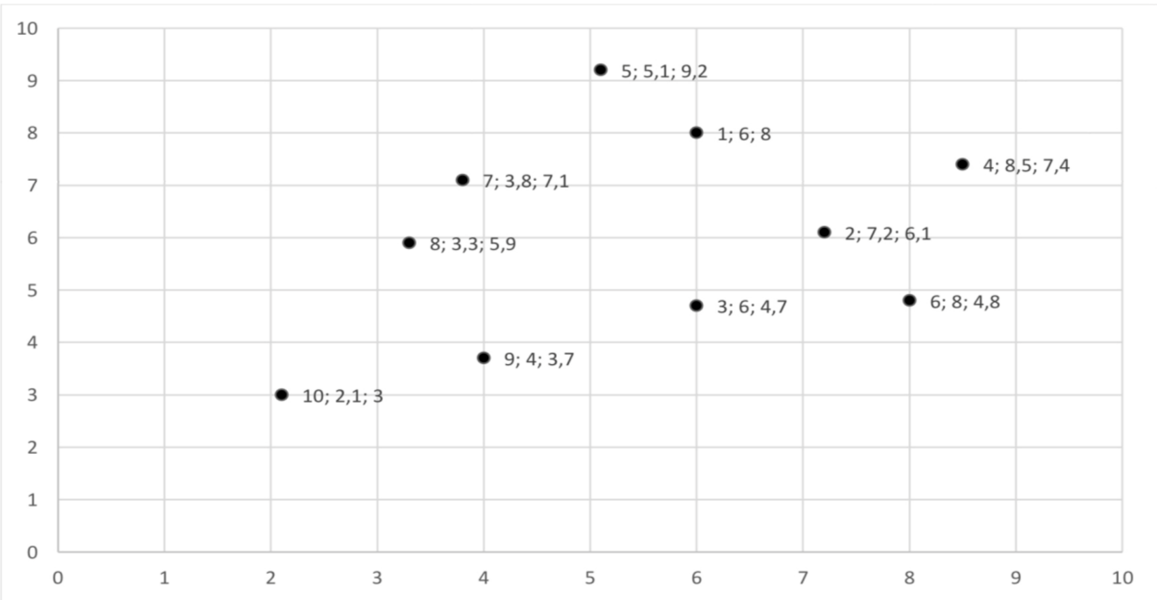
Graph 16: Retail network perception map trade on axes: price (x) - assortment (s)



The first map shows the position of retail chains on the price and range axes.

On the given map 2 positional are visible clusters: Auchan, Penny Market, Selgos Cash & Carry and Lidl Discount, Kaufland Romania, Carrefour Romania, and Mega Image. The leaders are Auchan and Profi.

Graph 17: Retail network perception map trade on axes: price (x) - recognizability (y)



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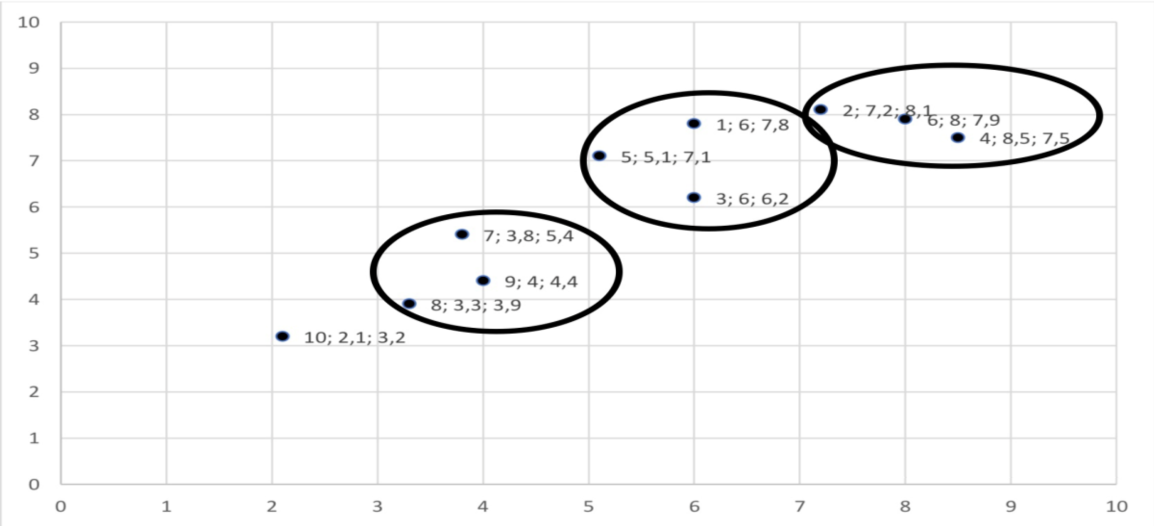
In accordance with given cards for occupation, free niches and minimization competition offered to position in the price segments "above secondary" and provide big assortment of goods.

According to these characteristics, no positional clusters. The leader is Mega Image through a significant presence network in Bucharest.

Graph 18: Retail network perception map trade on axes: price (s) - trust (s)

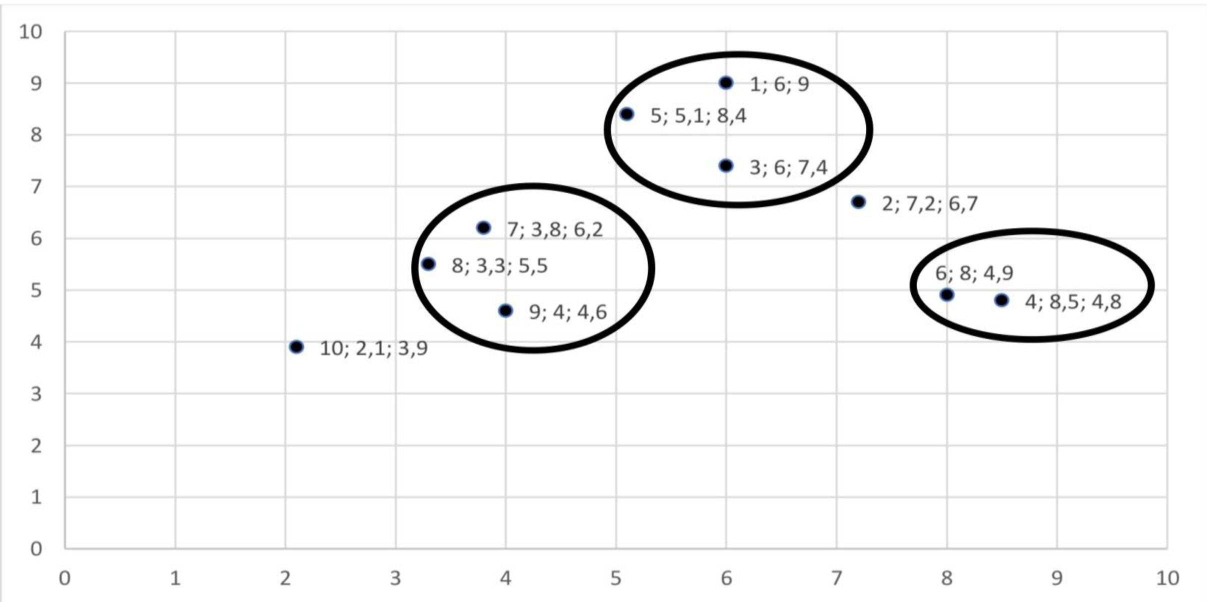


On this the map it can be seen 3 position clusters:

1) Profi, Metro Cash & Carry, Kaufland Romania;
2) Carrefour Romania, Lidl Discount, Mega Image;
3) Auchan, Selgos Cash & Carry, Penny Market.

All brands are located about one line that indicates that trust in these networks correlates with the perception equal prices in them.

Graph 19: Retail network perception map trade on axes: price (s) - convenience (s)



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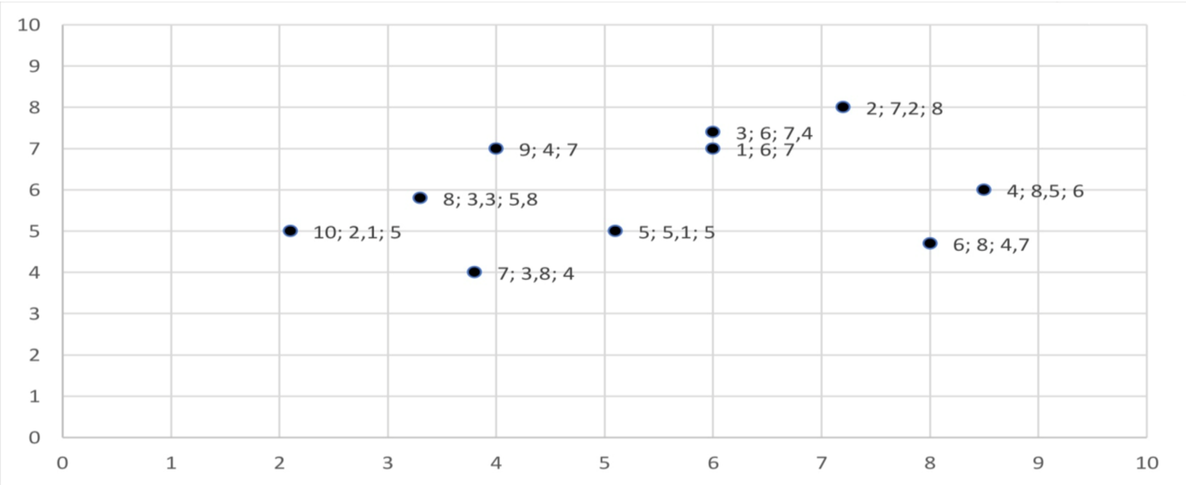
On this the map also shows 3 position clusters:
1) Profi, Metro Cash & Carry;
2) Carrefour Romania, Lidl Discount, Mega Image;
3) Auchan, Selgos Cash & Carry, Penny Market.

Graph 20: Map of perception of retail chains by axes: price (x) - quality (y)

Retail chains from the second group received the highest marks.



On this map also networks are located approximately on the line where is a correlation between perception prices and quality, except Profi and Metro Cash & Carry. These two networks are perceived as worse in quality than expected at this level of prices.

So, it is advisable to apply the innovative approach to the operation in this market.

It is offered to the companies to trade consumer goods familiar to consumers through the online platform, respectively buyers won't even need to leave the house for shopping after all the courier will deliver the order to the address specified at the order.

This concept will allow the company operates with only one warehouse of goods (the number of warehouses can be extended). The concept is to focus on competitive benefits: price, and organizational components, but at the same time occupy a particular niche market.

The realization of this concept will allow the company to minimize operating costs activity and reduce the amount of necessary investment to enter the market. Simultaneously saved funds can be used for purposes promotion of a new innovative product of the company.

3. CONCLUSION

The study develops an approach to positioning new companies in the Romanian retail market. For this purpose, 2 studies were conducted with the collection of primary information in the form of questionnaires, and conclusions about consumer behavior and consumer motivations were shown in graphic way. Also perception maps of existing retail chains in the market were developed.

The analysis showed that:

1. 97% of consumers make purchases once a week or more often;
2. 65% of consumers prepare holiday meals, which leads to increased demand for food before the holidays;
3. The most frequently visited formats are supermarket, mini market and discounters;
4. Romanian consumers do not want to spend a lot of effort and time on the way to the store and shopping, but delivery is used by only a small part of customers;
5. Almost 84% of respondents said that the distance to the store is one of the main factors of choice;
6. The most important when choosing a place of purchase were the level of prices, the availability of

self-service, the distance to the store, the network's own brands and social responsibility;

7. The vast majority of consumers spend up to 200 RON per week. The average amount of money spent on food and basic necessities is about 170 RON per week and 680 RON per month, respectively. That's about $150 (exchange rate on April 8, 2022).

Referring to the analysis of the features of consumer behavior of Romanians according to the results of the survey, a proposal for positioning was made.

Further research should be aimed at developing practical recommendations for market entry and the development and implementation of positioning strategies.

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