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THE EVALUATION OF MARKETING STRATEGIES OF PRIVATE LABEL MILK PRODUCTS FROM THE CONSUMERS' PERSPECTIVE: THE CASE OF KOCAELI PROVINCE

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ABSTRACT
In the intensely competitive retail sector, businesses prefer to market either own produced products in their markets or manufactured private label products. The purpose of this study is to understand the marketing strategies of businesses which produce private label products and determine consumer behaviour towards those products. In the scope of this study, a survey has been conducted in Turkey (Kocaeli) among 374 randomly selected households with face to face interviews. The gained data has been evaluated with multidimensional scaling analysis (MDS), PCA and MANOVA analysis using PASW 18.0 Package Program. Results indicate that 56.4% of respondents purchase private label milk, 43.6% of them do not. The main reasons for not purchasing are the perception that it is inferior in quality compared to the manufacturers' brand, routine purchase, and consumers' reluctance to "risk" changing brands, while price is the main reason for purchase. In conclusion, especially three criteria have a positive effect on consumer behaviour towards private label milk products.

1.INTRODUCTION

Nowadays, an in any field, intense competition in the retail sector has resulted in development of private label products of retailers. Retailers either produce their own products or have them produced and present them their own supermarkets. Private label products, which are produced or made to be produced by retailers in their name, have become widespread and extensively purchased especially in the food sector. The brands that wholesale dealers or retailers own are called private labels. (William & Ferrell, 2012). According to another definition, private labels are the brands that are owned and controlled by a retailer (Sayman & Raju, 2004).

This new practice, which is called distribution channel strategy, is used by several suppliers. This strategy allows for sale of the producer's generic brand but Supplier Company's label is put on producer's private label and supplied to the market. Therefore retailer companies have chance to substantially avoid product development and

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promotion costs. According to Consumption Panel Bulleting, which was published by the GFK, the most preferred product category considering 2014 penetration values are milk, chocolate- wafer and yoghurt (http://www.gfk.com.tr, 16.03.2015). In Turkey, supermarkets' private label applications are the most applied areas of private label (distribution channel) strategies such as Tansaş Sugar, Tansaş Milk, Migros Milk or Migros Sugar etc. In addition, Dost Milk and Le' Cola, that are produced by BİM retail services, can be considered as an example of private label strategy. In Turkey the increase of consumption of private label products, especially in recent years, makes this topic a point of interest. In this context, this study analysis private label milk and milk products that are only produced by retails and sold only in their stores.

The aim of this study to determine marketing strategies of retailers that develop private label products, to identify attitudes and behaviours of consumers towards private label milk products and to examine the contribution of strategies to the success of retail companies.

2. LITERATURE SURVEY

The gradual increase in the tendency toward private labels by retailers makes this subject a focus of interest, especially in recent years in Turkey. Even in the most highly-developed private label country, Switzerland, where 97% of categories had private label entries, these products' total market share was 45% (Nishikawa & Perrin, 2005). Countries such as Germany, Belgium, the UK, and Spain have already surpassed 30% (Gomez & Rubio, 2008). According to the "2012 market brands report" from the Retailing Institute, private label sales grew by 0.5% compared the prior year in Turkey. The total share of private label sales was 21.7%. Across the product areas of private labels, the food product group growth trend had the highest market share. The cleaning product group was second (Retailing Institute, 2015). This growth in private labels is attributable to several factors: retail concentration, retailers' marketing strategies, economies of scale, size of the national brand market, and consumer acceptance (Gomez & Rubio, 2008).

Private label applications, which was first applied by Migros-Turk, a pioneer of the idea of supermarket in 1957, did not play an important role in market for long time as the size of large scale chain stores were too small to create private labels, due to the insufficient quality and quantity of producers and lack of theoretical approaches. For this reason extensive use of private labels in Turkey by large scale retailers for different purposes began after the second half of the 1990s. 1990s and later years witnessed a great development of modern retail services in Turkey. Particularly foreign-origin hypermarkets and supermarkets entered market one after another. This created an intense competition in the retail sector. According to A. C. Nielsen's research, supermarket private labels most rapidly develop in Turkey; the share of private labels in the world is 13% and 23% in Europe.

In 2000, private-label brands in the Turkish market held 7-8% of the market share, while in the year 2010 they held about 10-12% (Yorgancıoglu, 2014). The main causes that opened the floor to private label brands were the economic deflation ob served in the 2001, which resulted in the decrease of consumers' purchasing power, and the appearance of foreign retailers (i.e. Continent). Another cause, almost equal in importance, was the retailer's aim to increase profits and become independent of their suppliers.

The previous literature is rich in studies regarding private label brands. Several experts explained the reasons of their success (e.g. Hsu & Lai, 2008; Steiner, 2004; Quelch & Harding, 1996). Others referred to product quality, retailers price or market power (Krishnan & Soni, 1997; Steenkamp & Dekimpe, 1997; Nandan & Dickenson, 1994). Some declared the factor of price or consumer's price consciousness (Sihna & Batra, 1999; Ashley, 1998), or focused on the role/impact of promotion or advertising for both national and private label brands (Parker & Kim, 1997). Lastly, several researchers studied the role of consumers' characteristics in purchasing, proneness and attitudes to-wards private label brands (e.g. Baltas, 1997; Dick et aI., 1997; Omar 1996). In spite of the fact that previous research is undoubtedly crucial in explaining private label success and consumers purchasing behaviour, no research has focused upon private label milk as the product under consideration, a product widely used in almost every household.

The numbers of the studies with regards to private label products are highly inadequate for Turkey. These studies are especially consumer-based studies. Other of these studies are examining consumers’ evaluations (Akbay & Jones, 2005; Kilic & Altintaş, 2009; Kurtulus, 2001; Ozkan & Akpinar, 2003), perceptions (Korkmaz, 2000; Orel, 2004) and the risk perceptions of consumers (Bardakci et al., 2003).

3. DATA AND METHODOLOGY

3.1. Research Goal

In this survey we aim to determine marketing strategies of retailers that develop private label products, to identify attitudes and behaviours of consumers towards private label milk products and to examine the contribution of strategies to the success of retail companies.

3.2. Sample and Data Collection

The study benefited from the data that were acquired consumers who live in the Kocaeli urban area. In collecting original data, in order to prepare case-specific questionnaire forms, a pilot study consisting of 50 consumers of retail chain stores was made and sample size was determined accordingly. As a result of this pre-questionnaire, it was found out that 58% of consumers use private label products and 42% of consumers do not use such products. Thus, limited main mass formula was benefited for the following rates below in order to determine sample size (Newbold, 2007). In the formula, confidence interval was taken 95 %, margin of error was taken 5% and let p=058, q=0, 42 to reach maximum sample size.

$$n = \frac{N.p.q}{(N-1)\sigma_p^2 + p.q}$$

n= sample size

N= main sample size (573.298),

p= ratio of people who prefer private label products (0, 58)

q= 1-p (0, 42)

σ_p^2 = ratio variance (0, 000651)

Table 1: Sample Size Distribution According to Number of Households in Districts

District	*Population*	*Distribution of population by percentage*	*Sample Size Distribution*
Gebze	94.760	16,53	62
Gölcük	53.769	9,38	35
Kandıra	23.835	4,16	16
Karamürsel	27.505	4,80	18
Körfez	49.496	8,63	32
Derince	47.315	8,25	31
Başiskele	31.341	5,47	20
Çayırova	37.731	6,58	25
Darıca	52.864	9,22	34
Dilovası	20.333	3,55	13
Izmit	107.504	18,75	70
Kartepe	26.845	4,68	18
Total	**573.298**	**100**	**374**

The sample size distribution to districts was compiled from TSI (Turkish Statistical Institute) data of 2012. Accordingly questionnaires were distributed to districts with regard to number of households. Table 1 demonstrates these numbers.

In the scope of this study, a survey has been conducted in Turkey (Kocaeli) among 374 randomly selected households with face to face interviews. The gained data has been evaluated with multidimensional scaling analysis (MDS), PCA and MANOVA analysis using PASW 18.0 Package Program.

4. EMPIRICAL FINDINGS

Today's retail marketers are managing their proprietary brands with the same combination of care and innovation as manufacturers of for their national brands. Retailers that attempt to gain competitive advantages against their rivals are inclined to develop their own branded (private label) products. Although this strategy is differentially used in different countries, retailers’ brands are named such things as private label (PL), own brand, in-house brand and store brand. At this point, it is very important to understand retailers’ strategic objectives for developing private label products.

It is seen that in Table 2 from the 374 respondents participating in the survey, 56,1% were males and 43,9% females, with the majority of the respondents (36,9 %) 30-39 years of age. Most of the respondents were married (78,3%) and 39,6 % held a bachelor degree. Lastly, 44,7% of the respondents had family monthly net income between 1500 TL and 3000 TL (Tablo 2).

Table 2: Distribution of Demographic Features of Consumers

Gender	**Quantity**	**%**	**Occupation**	**Quantity**	**%**
Male	210	56,1	Public official	98	26,2
Female	164	43,9	Housewife	50	13,4
Total	374	100	Labourer	143	38,2
Age	**Quantity**	%	Self-employed	45	12
15-19	8	2,1	Retired	26	7
20-29	50	13,4	Student	12	3,2
30-39	138	36,9	**Total**	374	100
40-49	107	28,6	**Monthly income**	**Quantity**	**%**
50-59	50	13,4	Less than 1000	42	11,2
60-69	21	5,6	1001-1500	99	26,5
Total	374	100	1501-3000	167	44,7
Marital Status	**Quantity**	**%**	3001-5000	56	15
Married	293	78,3	5000 and more	10	2,7
Single	81	21,7	**Total**	374	100
Total	374	100	**Family type**	**Quantity**	**%**
Education	**Quantity**	**%**	Nuclear	326	87,2
Illiterate	7	1,9	Extended	44	11,8
Elementary School	56	15	Other	44	1,1
Secondary School	36	9,6	**Total**	374	100
High School	112	29,9			
University	148	39,6			
Post-graduate	15	4			
Total	374	100			

While we examine consumers' preference of stores; we found out the following percentages: Migros 2,7%, Kipa 4,3%, CarrefourSa 8%, Metro 0,8%, Bim 39%, A-101 4%, Çagri 9,1%, Real 7% and others 25,1%. It was observed that BİM (39%) is the most preferred store for shopping (Table 3). In order to make private label of supermarkets better, it can be said that credibility of the supermarket should be increased and information about products should be provided for indecisive and doubtful customers. 40, 6% of the customers use 11-30% of their budgets for private label products of supermarkets.

Table 3. Distribution of Consumers' Preference of Stores

Store	Quantitiy	%
Migros	10	2,7
Kipa	16	4,3
Carrefoursa	30	8,0
Metro	3	0,8
Bim	146	39,0
A-101	15	4,0
Çağrı	34	9,1
Real	26	7,0
Others	94	25,1
Total	374	100,0

In this study, multidimensional scaling (MDS) analysis was applied in order to evaluate factors that affect customers' preference of private label milk products and to categorize their attitudes. The study employed individual differences scale ALSCAL (Nominal MDS). In this type of analysis, PASW algorithms both extend object space and models present a participatory space which shows nominal differences for dimensions in each participant's common object space (Giguere, 2006). MDS analysis benefits from distance matrices. For this reason it is necessary to calculate appropriate distance matrices according to data type (Dogan, 2003). This study used Euclidean distance.

Euclidean Distance $\boldsymbol{d} = \sqrt{\sum_{i=1}^{n}(\boldsymbol{x_i} - \boldsymbol{y_i})^2}$

The criterion of stress for goodness of fit has wide range of application in MDS analysis. It is an important criterion to determine whether the number of dimensions is appropriate of not in the graphical order obtained after the analysis (Filiz & Çemrek, 2005).

$$stress = \sqrt{\sum\left(\hat{d}_{ij} - d_{ij}\right)^2 \Big/ \sum\left(\hat{d}_{ij}\right)}$$

$\hat{\boldsymbol{d}}$ = i. and j. Data distance between individuals

$\boldsymbol{d_{ij}}$= i. and j. Configuration difference between individuals (Doğan, 2003).

Stress ratio is used as a criterion in deciding ÇBÖ solution is appropriated or not. Low stress-value indicates that the solution is appropriate whereas high stress-value refers to incompatibility. Kruskal presented a guided for interpretation of stress-value and compatibility of the solution in 1964 (Wickelmaier, 2003):

Table 4: Kruskal's Rule of Thumb

Stress Value	Goodness of fit
0.10-<0.20	poor
0.05-0.10	fair
0.025-0.05	good
0-0.025	excellent

In addition, other factors affecting consumers' preference of private label milk and milk products were evaluated. Data was collected through Likert scale. As presented on table 5, quality and being easy to use (4,36), trust to brand (4,3) and being accessible everywhere (4,08) were identified as effective factors on consumer preference.

Table 5: Evaluation of Consumer Preferences

Factors	Mean	Std. Deviation
Convenient price	3,81	1,15
In promotion	3,7	1,14
Quality and being easy to use	4,36	2,8
Trust to brand	4,3	0,87
Being accessible everywhere	4,08	0,99
Habit	3,88	1,16
Quality of package	3,83	1,19
Brand's recognisability	3,58	1,32
Product advertisements	3,18	1,37
Others	2,5	1,01

Statistical compatibility of analysis results was determined through examination of Kruskal stress-value. In two-dimensional presentation of MDS analysis, Kruskal Stress statistics were found 0,03424 and coefficient of determination (R^2) was calculated as 0,99600. According to Kruskal Table, stress value refers "*Excellent Goodness of Fit".* This means that there is a high level of compatibility between data distances and configuration distances. Two-dimensional geometric presentations of data showed a solid compatibility on linear form and it was determined that observational distances and difference were in a linear relationship. Figure 1 present distribution of observational distances and configuration distances (Shepard diagram).

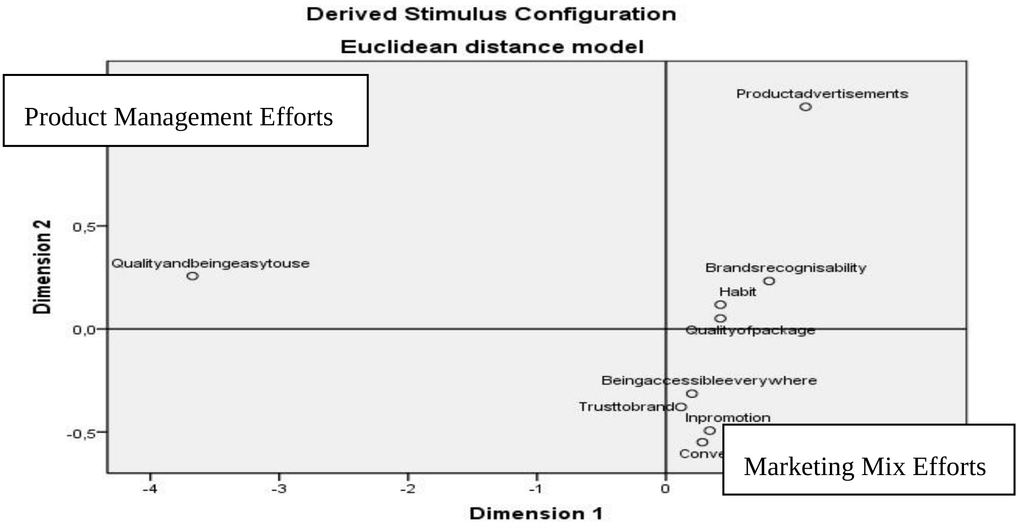

Fig 1. Two-Dimensional Presentation of Effective Factors on Private Label Milk Products

When we assess analysis results, three of the criteria that consumers pay attention concerning consumption of private label milk products, are accumulated in one group; these criteria are product advertisements, brand recognisability, habits, quality of package, convenient price respectively. Four of criteria constitute a different group; these are respectively being accessible everywhere, trust to brand, in promotion, convenient price. The examination of these groups reveals that product advertisements, brand recognisability, habits, quality of package, convenient price in positive position. In other words, the most important criteria that determine consumption of private label milk products are being accessible everywhere, trust to brand, in promotion, convenient price. This result demonstrates the importance of marketing mix strategy. Marketing mix is constituted by product strategy, price strategy, distribution strategy and promotions; they have considerable impacts of consumer choices. This analysis reveals that factors such as habits, trust to brand, accessibility and package are in the negative direction; this indicates that habits, trust to brand, accessibility and package do not play a considerable role for consumers to choose products.

Besides, in order to test 19 statements, which are to measure effects of marketing strategies in consumers' preference of private label milk and milk products, whether they are gathered under certain factors or not, factor analysis was made. With this analysis, basic factors and their loads were able to be identified in terms of effects of marketing strategies in consumers' preference of private label milk and milk products and in order to determine internal consistency of data; reliability test was made (Nakip, 2003). Reliability coefficient (Cronbach-Alfa) was found 0,82; according to this criterion the scale is reliable.

The Kaiser-Meyer-Olkin measure was used to identify variables are compatible with the factor analysis or not. KMO test result was calculated 0,836. With the assumption of KMO value is very good for 0,90's and good for 0,80s (Oraman & Unakıtan, 2010; Joseph & et al., 1992) the KMO test value acquired in this study (0,836) was regarded ideal. In addition, Barlett's Test of Sphericity value and significance tests whether variables demonstrate correlation with each other and shows whether it is possible to do factor analysis with the used data. Three factors, which emerged according to factor analysis results, were constituted by components that are seen on Table 6.

Table 6: Factor Analysis Results

Factors and Variables	*Factor Loads*	*Variance (%)*	*Eigen-values*
Product Strategy		28,898	11,105
Private label milk products that I prefer are very good.	,784		
Private label milk products are better than I expected.	,778		
I always buy private label milk products.	,757		
For the next shopping, I intend to buy private label milk and milk products.	,751		
The quality of private label milk and milk products are every good concerning their prices.	,687		
I prefer private label milk and milk products if a friend recommends met o buy it.	,654		
Promotion Strategy		24,208	1,245
Lotteries and competitions make me to prefer private label milk and milk products.		,761	
Vouchers make me to prefer private label milk and milk products.		,712	
Promotions such as two-for-one-deal make me to prefer private label milk and milk products.		,697	
I buy private label milk and milk products if they are in promotion in that store.		,685	
I buy private label milk and milk products if there is discount.		,666	
Interior displays and presentations make me to prefer private label milk and milk products.		,624	
I buy private label milk and milk products when they are in promotion.		,592	
Advertisements through internet sites or e-mail make me to prefer private label milk and milk products.		,578	
Positioning Strategy		17,400	1,047
Customer attitudes to private labels differ between differently positioned brands.			,737
I buy these products if a friend recommends me to buy.			,699
The higher the price of a product, the higher the quality			,680
I buy these products when the brand that I constantly consume runs short.			,614
Features of private label milk products such as package, colour and design are very similar to features of national product brands.			,571

KMO, 836, Barlett's test: 7360, 105; p<0.000

The main purpose of factor analysis is to reduce many variables into a few. After the analysis, each variable is given a name. Variables constituting the factor play a role in naming it. However sometimes factors that are not compatible with each other might gather in a factor. In this case the variable, whose factor load is the highest, was taken into consideration while giving a name (Nakip, 2003).

Product strategy; factor percentage that was defined by this factor group is 28,898 and expressed with six variables.

Promotion strategy; factor percentage that was defined by this factor group is 24,208 and expressed with eight variables.

Positioning Strategy; factor percentage that was defined by this factor group 17,400 and expressed with five variables.

Positioning strategy generally refers to definition of a product and its most important component brands by consumers and to practices that help to stick in consumer's mind better than its competitors. The role of positioning strategies in brand management is very important (Kırdar, 2003). An element that defines and differentiates a brand is the way of perception in consumer's mind which is constantly consolidated through communication attempts. Brand position can also be defined as a significant part of brand identity and brand value, which show the brand's advantages in comparison to its competitors and ability to communicate target customers (Aaker, 1996).

Table 7. Homogeneity Test of Covariance Matrices

Box's M	**39,783**
F	1,577
df1	24
df2	7362,267
Probability	0,366

During the first stage of the MANOVA test, homogeneity of covariance matrices of the groups. In this study, for covariance homogeneity test, Box's test for equivalence of covariance matrices was employed (Table 7). According to the test result, group covariance matrices were found homogenous (*Probability* = 0,366. Accordingly, MANOVA analysis results can be used in analysing the significance of the groups.

In this study it was observed that average vectors of monthly income groups were significantly different (0,05) from each other (Wilks' Lambda=0,885, Probability =0,000) (Table 7). According to this result, at least one of the attitudes of customers towards marketing strategies of private label milk products is different from other groups.

Table 8: Test Results of Group Average Vectors

Impact	Test Value	F statistics	SD Hypothesis	SD Error	Probability
Constant					
Pillai's Trace	,010	1,280	3,000	366,000	,281
Wilks' Lambda	,990	1,280	3,000	366,000	,281
Hotteling's Trace	,010	1,280	3,000	366,000	,281
Roy's Largest Root	,010	1,280	3,000	366,000	,281
Group					
Pillai's Trace	,118	3,755	12,000	1104,000	,000
Wilks' Lambda	,885	3,805	12,000	968,636	,000
Hotteling's Trace	,126	3,838	12,000	1094,000	,000
Roy's Largest Root	,092	8,424	4,000	368,000	,000

It is necessary to look at MANOVA test results in order to determine which element or element(s) were different in terms of consumers' attitudes towards marketing strategies of private label milk products according to consumers' monthly income groups (Table 8). Before moving to MANOVA test, the homogeneity of error variances of variables should be tested. According to the Levene test results presented on Table 9, error variances of variables are homogenous as follows (Probability> 0,05).

Table 9: Homogeneity Test of Error Variances (Levene's Test)

	F statistics	sd1	sd2	Probability
Product strategy	,634	4	368	,639
Promotion strategies	1,832	4	368	,122
Positioning strategies	,487	4	368	,746

According to results of MANOVA analysis, it can be claimed that the difference between monthly income groups stem from attitudes towards statements among promotion strategies and positioning strategies (Table 10). Attitudes towards promotion strategies (p=0,005) and positioning strategies (p=0,000) present a significant difference according to monthly income groups. No significant difference was found between the groups in terms of statements in product strategies.

Table 10: MANOVA Test Results

Dependent Variables	Type III Sum of squares	sd	Mean of squares	F statistics	Probability
Product strategy	4,770	4	1,193	1,195	,313
Promotion strategy	14,632	4	3,658	3,767	,005*
Positioning strategy	24,366	4	6,091	6,448	,000*

Research shows a strong correlation between private label sales and current income conditions. Improved consumer sentiment concerning the quality of private label products also argues for continued strong growth and indicates that private label brands should be able to retain gains made during the recession even as the economy improves. A Nielsen online survey conducted in the third quarter of 2010 found that 60% of respondents purchased more private label brands through the recession, and that 94% of those respondents will continue to purchase private label products even after the economy improves (Toops, 2012).

5. CONCLUSION

Private label has experienced considerable growth in the last decade, both in size and scope. As retailers expand into new countries and develop more of their own private label products, national brands will face increased pressure to reduce costs and differentiate their product offerings. The current recession provides an opportunity for private label growth by capturing money-strapped or risk-averse consumers.

While national brands can use an emotional connection with consumers to maintain loyalty in poor economic times, they have found it increasingly difficult to convince consumers that their products are worth the extra cost.

Private label products in Turkey are less expensive then manufacturer prices with an exception of four subcategories, as yoghurt, soap and shower gel, butter and instant coffee. Supermarkets can have a stronger position against hypermarkets by using private labels. In Turkey, consumer preference for brand labels in some products categories are higher than others, due to perceived risk. Private label products are preferred by consumers who are not brand loyal, and who don’t want to bear the advertising expenditures and look for a lower price. In Turkey, consumer preference for brand labels in some products categories are higher than others, due to perceived risk. Private label products are preferred by consumers who are not brand loyal, and who don’t want to bear the advertising expenditures and look for a lower price

As private label products have moved from generic staple-based products to today's premium and innovative products, they have had increased appeal across demographic groups and geographic regions. While tomorrow's private label market is rather uncertain, current consumer trends will continue to evolve and shape demand for these products. A study by The Hartman Group (2006) found that “when consumers take into consideration essential elements of purchase decision-making (quality, value, price, taste, appearance, etc.,) the gap between private label and name brands has definitely closed.

In the light of research finding, the retail market share of private label milk products increases day by day in Turkey. The variety of products in this field extends while it is observed that many supermarkets sells products with their own name and their convenient prices make consumers satisfied. The change of shopping habits is observed in supermarket shelves and this is an important finding of this study. Consumers become more conscious day by day; it is a fact that they desire quality products in a more economic way. Private label products fulfil demands of conscious consumers. These products that are put up for sale by supermarkets under their own names make customers happy with their attractive price and quality. Private label products offer an alternative with better prices for customers. According to Private Label Reports (2014) published by research company Ipsos KGM, private label products have significantly become widespread in the world and Turkey; they have particularly become popular among European customers. According to the most recent statistics by market research companies, there is significant increase in the number of customers who prefer private label products rather than national brands. In Turkey, the increase of private label products' share in fast moving consumer goods is interesting (http://www.retailturkiye.com/genel-haberler/market-markali-urunlere-ilgi-artiyor, 2015). In recent years, the main reasons lying behind these changes in consumer trends are the following: Developing quality of products, increasing power of retailers, decreasing innovations and advertisement of producer's brand. However the most important factor in choosing private label milk products is the sensitivity of customers to prices. In general the prices of private label milk products are 15-40% less than producer's brand. For example, a study conducted in England demonstrates that consumers are doubtful about the prices of national brand products and they prefer to by inexpensive private label products (http://www.retailturkiye.com, 15.03.2015). The success of private label product varies much among product categories and this depends of price consciousness that is developed among customers. In addition, trust to the store is another factor for choosing products. It motivates customers to purchase private label products more.

As a result, marketing strategies of private label products should be handled in line with the benefits of the products, target customers and particularly institutional strategies within the company where all brands are integrated. Through decisions of institutional strategies and appropriate integration of market mix components, brand positioning that is desired for customer perception should be formed. A pledge, that expresses the brand in a best way, should be formed and it needs to be supported through promotional strategies and marketing communication activities. Brand strategies should make the brand more recognisable than other rival brands. The recognised brand should also be preferred. Consumer tendencies to buy a particular brand should not be evaluated in the present time but also for future and dependency on a brand should be increased. Finally consumers, who know the brand, prefers it and present a loyalty to it, constantly looks for the same brand which might lead to brand leadership.

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