CONSUMERS' CRITERIA TO SELECT FOOD RETAILERS REVISITED IN THE CURRENT ENVIRONMENT.

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Abstract:

Food retailing is undergoing major transformations, particularly in France. Hypermarkets are declining, hard-discount stores are gentrifying, e-commerce is mixing with physical distribution, convenience stores are gaining presence and market shares, other forms are emerging: short, collaborative or cooperative channels. Consumers are clearly changing their buying patterns. How do people currently select a form of sale? Are there any changes in their selection criteria or in their perception of food retailing that can explain that they are turning away from hypermarkets to go to more meaningful places? The objective of this research is to revisit the consumers' criteria to select a form of sale in the current environment. A qualitative research carried out on forty individuals confirms the accuracy, in today's context, of criteria described in the literature but also enables the identification of a new criterion: the origin of the products purchased. Moreover, it shows the perception of current consumers about food retailing in France, such as a kind of hostility against hypermarkets. Finally, it invites further exploration of the symbolic functions of retail trade by studying the role played by consumers' individual values in their selection of a form of sale.

Keywords: Retailing; short food channels; symbolic functions; selection criteria

Consumers' criteria to select food retailers revisited in the current environment.

1. Introduction

French forms of food retailing are undergoing profound changes (Badot, Lemoine and Ochs, 2018). Hypermarkets are clearly declining, hard-discount stores are moving towards a more qualitative offer, e-commerce is growing exponentially, increasingly blending with physical distribution, convenience stores are strengthening their position on the market and other forms of retailing are regaining favour with consumers (Hérault-Fournier, Merle and Prigent-Simonin, 2012; Merle, Hérault-Fournier and Werle, 2016; Beaudouin, Sugier and Robert-Demontrond, 2018). As a matter of fact, some retailers are reinventing themselves by developing short circuits, collaborative, cooperative, bulk or zero waste stores. Trends in the consumption of organic, local, fair trade, committed, responsible or socially conscious products are growing over the years. Consumers have become distrustful about institutions (Badot, Lemoine and Ochs, 2018). Repeated food scandals, from mad cow disease in the 90s to bacteria in infant milk recently, through horse meat instead of beef in lasagna, have discredited all stakeholders in the "mass market" system (Allard-Huver, 2016). In addition, consumers are more concerned about their health and their impact on the environment (L'Obsoco, 2016, 2017, 2020). They also have a constant access to information of any kind, even in stores (Vanheems and Paché, 2018). Applications to double-check the composition of products or the discourses of brands have emerged so roughly, changing the established rules and the power of distribution. Therefore, consumers are changing not only the way they consume but also their sourcing methods. They seek to give more meaning to their consumption (Decrop, 2008), even if that involves making their purchasing paths more complex. How do people currently select a form of sale? Are there any changes in their selection criteria or in their perception of food retailing that can explain that they are turning away from hypermarkets to go to more meaningful places? Understanding their choices and their attraction for these new forms of sale is a real challenge for all the players in food retailing.

The objective of our research is to revisit the criteria to select a form of sale in the current environment. Firstly, the analysis of the literature allows us to better understand the evolution of retail forms, from the consideration of their utilitarian function to the recognition of their symbolic functions, and to determine the criteria of choice already identified. Secondly, an exploratory qualitative study based on forty semi-directive interviews highlights a new criterion, the origin of the products bought, and shows how current consumers perceive French food retailing.

2. Literature review and conceptual framework.

Understanding the evolution of retail forms.

To understand this evolution of retailing, we can rely on models that tried to explain the dynamics of sales forms. The first models are based mainly on the characteristics of the offer, i.e. price and assortment (Mc Nair, 1958; Hollander 1966). According to the "Wheel of Retailing" theory (Mc Nair, 1958), their evolution would follow a cycle in which three phases succeed one another: the market entry with low prices and low margin, an up-grade of the offer, and then vulnerability, the final phase before the disappearance of the sales form. Hollander (1966) retains the cycle principle and introduces the notion of assortment as an explanation of the evolution of sales forms. Thus, in the Retail Accordion theory (Hollander, 1966), forms of sale follow one another in a cyclical manner by adopting an assortment

sometimes characterized by a strong specialization of the offer, sometimes by a great width of the latter. Several examples, such as hypermarkets and department stores in France, show the limits of these theories. These forms of sale have been able to adapt themselves and have not disappeared, hence proving that price and assortment are not enough to explain the evolution of retail trade (Filser, Des Garets and Paché, 2020).

Following this seminal work, research in retailing has been enriched by other theories such as "Natural Selection" (Dreesman, 1968; Forester, 1995) which takes into account the environment and competition between forms of sale, or the "Retail Life Cycle" (Davidson, Bates and Bass, 1976) based on the product life cycle model. We can also mention the dialectical model of Maronick and Walker (1974), according to which the evolution of retail trade is the result of the effects of competition. More recently, the "Big Middle" theory (Levy & al., 2005) has renewed the "Wheel of Retailing" (Mc Nair 1958) by retaining "the possibility of innovation based on qualitative differentiation of the offer" (Filser, Des Garets and Paché, 2020) as another factor than price to describe the development of a new form of sale. The literature on the evolution of retailing, as rich as it is, does not allow us to understand its current dynamics, nor to predict its evolution. It remains attached to the analysis of the utilitarian function of retail, supply, and does not consider its symbolic functions (Filser, 2010).

From the utilitarian function to the symbolic functions of retailing.

Motivations for visiting a form of sale or a store itself are multiple. Firstly, they can be simply utilitarian to take advantage of the supply function mentioned above (Bettman, 1979; Babin, Darden and Griffin, 1994). Secondly, they may be personal such as playing a role or keeping abreast of the latest trends (Tauber, 1972). Those kinds of motivations include a hedonic dimension (Babin, Darden and Griffin, 1994) for example to have fun or to indulge oneself. Finally, the reasons may be social to interact with other people or to establish one's status for instance (Tauber, 1972). This shows that the choice of a form of retailing goes beyond the purchase itself, beyond its utilitarian function, and includes more symbolic functions. Stone (1954) was the first to highlight other motivations than just get supplies in the choice to visit a form of sale. He identified purchasing orientations by observing four types of consumers: economic, for price-sensitive consumers who play a key role in the household; apathetic, for those who experience shopping as an inescapable chore; ethical, for those who are concerned about the smooth running of local shops; and unique, for those who expect a personalized relationship. These purchasing orientations allow for a pre-selection of outlets, as shown by Lusch (1982) through his model. The choice will then be made by evaluating the possible alternatives on the basis of a set of desired advantages (Filser, 1986), linked to attributes such as the characteristics of the offer (price, choice, quality, originality, freshness) and the practical aspects of the store visit (proximity to home or work, opening hours). Holbrook (1999) suggests that people real desire are not products but satisfying experiences they hope to live through the use of the products or the process to acquire them. He defines consumer value as “an interactive relativistic preference experience” (Holbrook, 1999: p. 5). Three dimensions have to be considered to define its eight types of consumer value: extrinsic or intrinsic, self-oriented or other-oriented, active or reactive (Holbrook, 1999). This typology can be used to analyze consumer behavior as they visit a store (Filser and Plichon, 2004) and gives us more proofs of the symbolic functions of retailing.

The observation of statistics on the main forms of distribution, the recent changes in consumer behavior and the recognition of the symbolic functions of retailing invite us to broaden the criteria considered in the models of choice of forms of sale by integrating more ideological aspects of consumption. Our research is thus positioned in the "Consumer Culture Theory" (Arnould and Thompson, 2005) which allows the study of "consumer identity

projects" by leaving aside the transactional aspect of trade to focus on its more symbolic aspects. Could a change in consumers perception of retailing or in their criteria to select their purchasing places explain this attraction for other forms of sale that include more symbolic connotations than hypermarkets?

3. Research methodology.

The implementation of an exploratory qualitative study seems appropriate to answer this question. Indeed, this approach is "particularly effective for exploring complex phenomena, such as individual motivations, [...] or decision-making processes" (Gavard-Perret & al., 2012: p. 108). The method of collection chosen is the semi-structured interview because it allows some flexibility in the conduct of the discussion with the respondent. It also enables a comparative and cumulative analysis thanks to the interview guide necessarily followed. We interviewed forty people responsible for their household's food shopping in order to gather testimonies from consumers who were actually confronted with the choice of a store to buy food. The respondents were selected according to a logic of diversity of profiles, integrating criteria of age and socio-economic situation (see appendix 1). However, they were almost exclusively women: food shopping is a predominantly female task (Chanel, 2019). We made sure that the testimonies were representative of the diversity of existing forms of food sales in the market. As the fragmentation of food purchases is even more pronounced than in the past[1], we naturally met consumers who use a mix of different retailers. The interviews were conducted face-to-face, by videophone or by telephone, for an average of forty minutes, mainly between May and July 2020. We started the data collection in February 2020 but had to adapt it to the conditions of the first French lockdown due to the COVID-19 pandemic.

The interview guide was structured around two themes: the respondent's practices in themselves, their genesis and their dynamics (recent evolution? planned?), and the perception of the distribution offer, both frequented and not frequented. We used several questioning techniques (Guelfand, 2013): traditional direct questions, mostly open-ended, questions based on the association of ideas ("If I say supermarkets, what do you think of?") but also questions using life story techniques ("Can you tell me how you came to frequent this store?"). The principle of data saturation (Glaser and Strauss, 1967) was reached around 30 interviews. We chose to continue the interviews in order to have a solid corpus and rich verbatim.

In parallel to the interviews and after full collection, we proceeded to a complete transcription of the respondents' discourses. We then carried out a content analysis, manually and also assisted by Nvivo 12. We chose continuous thematization by assigning themes throughout the analysis, simultaneously with the construction of the thematic tree in order to obtain the finest possible analysis of the corpus (Paillé and Mucchielli, 2012).

4. Findings and discussion

Confirmation of the selection criteria identified in the literature.

The content analysis confirms the relevance, in the current environment, of the purchasing orientations and choice criteria identified in the literature. Indeed, we find the four profiles dear to Stone (1954) among the respondents and they clearly mention the characteristics of the offer (price, choice, quality, freshness) and the practical aspects of the visit (proximity to home or work, opening hours) as criteria for choosing a place to buy food products for their household.

1 French people frequently visit 7.8 different retailers as an average for their food purchases in 2018, i.e. almost one more than ten years ago, according to Kantar Worldpanel (Puget, 2018).

Emergence of a new criterion: the origin.

A new criterion of choice seems to emerge around the traceability and the origin of the food products bought. The question of origin did not arise, or hardly at all, during the first studies on retailing and choice criteria. And that was for a good reason: it was not an issue at this time. Technical and technological progresses have facilitated economic exchanges and allowed products from all over the world to appear on shelves. Moreover, they have shaken up the seasonality of fruits and vegetables as it was known before. Origin appears to be an essential criterion of choice for consumers of short circuits and other circuits with a more symbolic scope, but it is also mentioned by the regular clients of hypermarkets and supermarkets ("we look more at the origin of products" A. 43 years old). They emphasize their distrust of the way fruit and vegetables are grown in other countries ("if you want me to buy organic produce full of pesticides from Spain, that's not healthy eating" C. 43 y.o.). The intensive use of pesticides, but also regulations perceived as less strict than the French ones, raise questions and fears for their health linked to the consumption of these products from elsewhere. They also disapprove the negative impacts on the environment. While some consumers welcome efforts to source locally or nationally, they are concerned about the trade conditions under which these partnerships with small producers are carried out ("we're going to bleed people to get the lowest price" S. 35 y.o.). This brings us to another finding of this study: the negative perception of hypermarkets.

A negative perception of hypermarkets.

If the name of emblematic French retailers is what comes first in the interviewees' mind when we ask them what "mass retailing" makes them think of, their definitions are quickly focused around "too much": "too big", "too many things", "too much everything" ("It's much too big, there are too many people, there are too many things" C. 59 y.o.). A distinction between the forms of sale according to their surface appears naturally in their speeches. Thus, supermarkets are somewhat spared thanks to their size, which is considered to be human, whereas hypermarkets crystallize the criticism and seem to embody, almost single-handedly, "mass- distribution". The majority of the respondents were very negative about this sector ("it makes me feel unpleasant [...], a waste [...], not human at all" C. 26 y.o.); some of them even felt "despised by the system as long as you buy" (E. 76 y.o.). Even if some of them soften their words by recognizing the practicality of having "everything under the same roof" ("for people who need to do all their shopping at once" I. 56 y.o.), especially in this year of unprecedented health crisis, the negative perception seems to affect all age groups ("in fact, I get a lot of negative things [...] volume, price, war" M. 30 y.o.), including the over-sixties who saw the birth of hypermarkets in France. Indeed, they speak of this birth with emotion and nostalgia ("it was the cave of Ali Baba" E. 70 y.o., "it was dazzling to see so many products in one go, we had the impression that we were going to eat better" G. 64 y.o.) but paint a much less idyllic picture today ("I think that's what I can't stand: that there is this profitability at all costs; they can't lose [...] we've lost the sense of profitability that would be more healthy" G. 64 y.o.). Four reasons are given by respondents to justify this negative perception:

- The influence of the media through reports on managerial practices in the retailing industry and on the way manufacturers produce, but also programs raising awareness on the link between health, food and environmental issues: "we are more aware" A., 43 y.o.

- The influence of children, for whom parents want the best from birth, who ask questions as they grow up and encourage reflection on the consumption habits of the household: "We buy more organic [...] saying to ourselves that it was better for him" L. 28 y.o.; "because at

school we talk to them about environment and local life" L., 43 y.o.; "my children have questioned me, challenged me" C., 47 y.o.

- The observation in person or by someone close of dubious practices in the retailing industry: "I had also seen a trick when they weighed meats, they pressed on the scale" T. 54 y.o.; "His stories were terrible" C. 26 y.o.,

- Conclusive experience in other channels: "vegetables on the market, it's great!" I. 56 y.o.; "we realize that we eat better [...] it's not at all the same flavors" C. 26 y.o.; "At a butcher [...] it's quality" J. 34 y.o.

The importance of the symbolic functions of retailing.

The discourse of some respondents shows the importance of the symbolic functions of retailing. Echoing the work of Tauber (1972), they find in frequenting a form of food retailing a response to their personal motivations of self-gratification, distraction and inspiration on new trends, but also to their social motivations in joining a loved one to share an experience outside their home. In addition, many testimonies refer to the notion of individual values, especially among those who visit small independent shops, but also among the regulars of supermarkets and convenience stores. The choice of where they buy seems to contribute to the construction of their identity and the affirmation of their role in society ("the impression that it is logical, that what we eat, we must know where it comes from and then, at the same time, we help to support those who produce what we eat", "that is my political action" C., 26 y.o.). Trade-offs between practical constraints and convictions even lead some consumers to complicate their purchasing path ("Our consumption is rather oriented by the double constraint of time and convictions which are not compatible! That's why I mix " V., 45 y.o.) and suggest some dissonance between the choice of shopping locations and personal values.

5. Conclusion

The results of our study confirm that the purchasing orientations and choice criteria identified in the previous work remain entirely relevant in the current environment. However, in light of what we have heard, a new criterion should be added: the origin of the products provided by retailers, meaning production location and whole traceability. The identification of this criterion is of particular importance from a managerial point of view, as many of the consumers interviewed are paying more and more attention to local economy and to the health and environment impacts of their consumption. This concern leads them to question their choice of shopping locations, or even to mix between several forms of sale. Hypermarkets stand out as being perceived negatively and are the focus of criticism of mass retailing, regardless of the age of the respondents. The media's view of this industry and its various stakeholders, the role of children, the direct observation of questionable practices or more satisfying experience in other channels justify this perception according to the interviewees. The meaning given by consumers to their visit to the store shows the importance of the symbolic functions of retailing beyond its utilitarian function. Their evocation of individual values raises questions about the role of these values in the choice of a form of sale. To our knowledge, this link has not been established in the literature and its exploration opens up stimulating perspectives.

6. Limitations and further research

We can formulate the following limitation about our research: the year of our study, 2020, was deeply impacted by an unprecedented health crisis, de facto changing behaviors. Even though we tried to isolate practices before/during/after the first containment, this crisis

had an impact on perceptions and on the food retailing sector itself. Even if the changes in habits were often reported as temporary by the respondents, and the search for meaning reinforced mainly for those who already started to reflect on their practices, only a new wave of interviews and the analysis of the sales figures of the coming years could confirm these elements.

This exploratory qualitative study pushes us towards a new approach that would put into perspective consumers' choice criteria for food retailing forms, as confirmed and expanded here, and the concept of individual values, widely developed in the social sciences (Boudon's axiological dimension of rationality (2009); Schwartz's individual values (1992, 2006); Rokeach's instrumental and terminal values (1973)). The particularly stable nature of values is a major asset for the continuation of our research in these turbulent times for retailing and consumption.

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8. Appendix 1

	Individuals	First name initial	Age	Sex	French State of Residence	Number of children	French Socio-professionnal category	Date of interview	Duration
1	Cas\\AA1007	A	39	Female	54	1	5	10/07/2020	00:36:39
2	Cas\\AB0907	A	49	Female	54	3	5	09/07/2020	00:23:09
3	Cas\\AC2606	A	28	Female	21	0	4	26/06/2020	00:37:03
4	Cas\\AM3005	A	42	Female	21	2	3	30/05/2020	00:29:49
5	Cas\\BP3006	B	30	Female	44	0	5	30/06/2020	00:37:35
6	Cas\\CC1906	C	26	Female	21	0	8	19/06/2020	00:39:20
7	Cas\\CC3006	C	59	Female	21	5	4	30/06/2020	00:46:30
8	Cas\\CH1706	C	71	Female	54	2	7	17/06/2020	00:39:45
9	Cas\\CL0906	C	39	Female	63	2	3	09/06/2020	00:51:31
10	Cas\\CM1606	C	47	Female	54	2	4	16/06/2020	01:00:39
11	Cas\\CR2702	C	42	Female	21	2	5	27/02/2020	00:39:14
12	Cas\\CV2602	C	43	Female	21	2	2	26/02/2020	00:45:00
13	Cas\\EM0606	E	70	Female	54	2	7	06/06/2020	00:41:49
14	Cas\\EM2806	E	76	Female	54	3	7	28/06/2020	00:48:04
15	Cas\\FC2606	F	60	Female	21	3	7	26/06/2020	00:25:37
16	Cas\\GC0205	G	54	Male	08	2	4	02/05/2020	00:35:12
17	Cas\\GC0707	G	64	Female	21	0	7	07/07/2020	01:10:57
18	Cas\\GM0107	G	68	Female	21	2	7	01/07/2020	00:24:57
19	Cas\\IB2905	I	56	Female	92	1	3	29/05/2020	00:29:25
20	Cas\\ID2306	I	39	Female	21	2	3	23/06/2020	00:30:49
21	Cas\\JK0306	J	37	Female	54	2	4	03/06/2020	00:45:24
22	Cas\\JL2702	J	34	Female	21	0	5	27/02/2020	00:39:57
23	Cas\\JM0106	J	42	Female	88	1	3	01/06/2020	00:43:32
24	Cas\\LC1406	L	43	Female	21	2	3	14/06/2020	00:29:20
25	Cas\\LN2506	L	28	Female	38	1	3	25/06/2020	00:56:03
26	Cas\\MC0306	M	30	Female	95	0	8	03/06/2020	00:50:41
27	Cas\\MC2905	M	30	Female	21	0	8	29/05/2020	00:40:56
28	Cas\\MJ2003	M	28	Female	21	0	4	20/03/2020	00:33:17
29	Cas\\ML2705	M	41	Female	92	2	3	27/05/2020	00:39:00
30	Cas\\MN1109	M	67	Female	61	4	7	11/09/2020	00:32:28
31	Cas\\MR1206	M	32	Female	21	1	3	12/06/2020	00:54:48
32	Cas\\MV2802	M	26	Female	21	0	8	28/02/2020	01:10:57
33	Cas\\ND2611	N	48	Female	21	3	3	26/11/2020	00:28:56
34	Cas\\PB0406	P	45	Female	92	2	3	04/06/2020	00:34:18
35	Cas\\SL2406	S	35	Female	67	0	5	24/06/2020	00:41:29
36	Cas\\SM2905	S	45	Female	92	3	3	29/05/2020	00:40:13
37	Cas\\SS0106	S	44	Female	92	3	2	01/06/2020	00:32:30
38	Cas\\TM1611	T	54	Female	21	0	3	16/11/2020	00:55:37
39	Cas\\VB2202	V	45	Female	92	2	3	22/02/2020	00:28:37
40	Cas\\VD0306	V	40	Female	74	3	3	03/06/2020	00:29:01
		Mean Age	***44,9***					***Average duration***	***00:40:30***
		Median Age	***42,5***						