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PRODUCT RELATED FACTORS DETERMINING CONSUMER BEHAVIORS IN THE YOGURTS MARKET

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Key words: yogurts market, consumer behaviors, competitiveness.

A b s t r a c t

The paper presents the results of the diagnostic survey conducted among consumers of yogurts. The studies showed that the major factors encouraging consumption of yogurts are health, nutritive and dietetic properties of those products while the choice of a specific product is determined by the taste, quality and price.

PRODUKTOWE DETERMINANTY ZACHOWAŃ KONSUMENTÓW NA RYNKU JOGURTÓW

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S ł o w a k l u c z o w e: rynek jogurtów, zachowania konsumentów, konkurencyjność.

A b s t r a k t

W artykule przedstawiono wyniki sondażu diagnostycznego przeprowadzonego wśród konsumentów jogurtu. Badania wykazały, że głównymi czynnikami skłaniającymi do spożywania jogurtów są względy zdrowotne, odżywcze i dietetyczne. O wyborze konkretnego produktu decydują głównie jego smak, jakość i cena.

Introduction

During the last several years the consumption of yogurts in Poland has been increasing continually. This is a result of increased public awareness concerning healthy nutrition and very intensive promotion of that group of fermented dairy drinks as products with high dietetic and health values. Increase in demand for yogurt is linked to continual extension of the offer diversifying the products as concerns their taste, consistency, weight, applied additives in the form of applied taste and flavor substances and bacterial cultures by the manufacturers. Among yogurt manufacturers the same companies have dominated for years: Danone, Bakoma and Zott, which promoted well known brands and applying intensive promotion strengthen their market positions. Increase in yogurt consumption caused a change in the dairy drinks consumption structure where the consumption of fresh milk and extended shelf life milk decreases with the increase in the fermented drinks segment. The paper presents the results of the diagnostic study conducted on the group of 198 yogurt consumers that aimed at identification of factors influencing the decisions by consumers of those drinks. Consumer preferences concerning qualitative characteristics of products, frequency and place of purchase, importance of the price and brand for the purchase decision in the market segment investigated were the subject of the analysis.

Yogurts market characteristic

Yogurts appeared in the Polish food market relatively recently because only during the early 1990s when imported yogurts promoted as products with dietetic and health values recommended in the diet of children and people taking care of their health reached the market. As of that time the yogurts market is among the most dynamically developing segments of processed dairy products. This results from appreciation of the health, nutritional, dietetic and taste values of yogurts by the consumers as well as the fast development of the products offer as a consequence of the investments made by the domestic dairy industry and foreign dairy multinationals such as Danone or Zott. Production of yogurt during the years 2000–2007 more than doubled from 1,761,600 hl to 3,800,000 hl. Still, consumption of yogurts in Poland is lower than in other countries at ca. 5.5 kg per capita per year while in e.g. the Czech Republic it is 10.3 kg and in Germany 15.8 kg. The increase in the volume of production is coupled with the extension and improvement of the products range and improvements in the distribution as well as expansion of promotional activities. The extension of the products offer includes new products, e.g. with cereal

grains, with lowered fat and/or sugar content, with addition of fruit and also diversification of product weight and packages and additions (fruit, spoons, etc.). The yogurts market is dominated by three companies, i.e. Danone, Zott and Bakoma, which in total have around 80% of the market both by volume and by value (Fig. 1). The remaining part of the market is supplied by smaller manufacturers and domestic dairy cooperatives. The dominating manufacturers established strong brands of their products such as Actimel or Activia (Danone) and Jogobella (Zott).

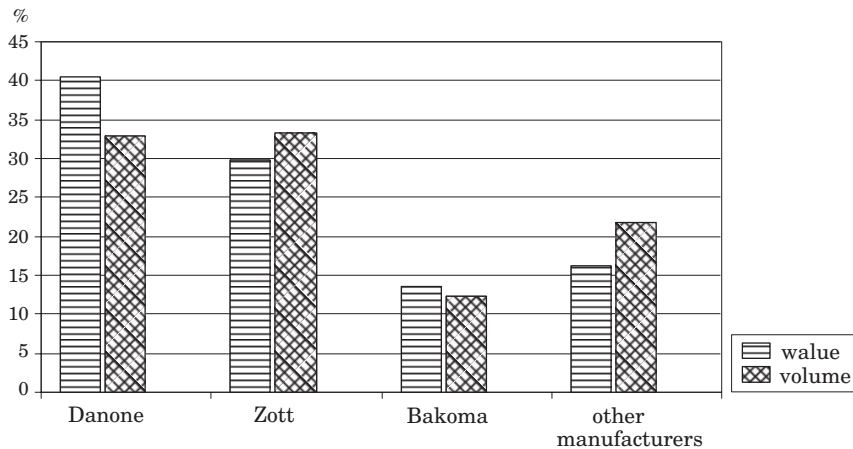


Fig. 1. Yogurts market structure by manufacturers

Source: CZAMAJŁO (2008).

The established position of brands and intensive promotional activities by market leaders cause that the other manufacturers occupy niche and regional positions. In the international trade in yogurt the export is much larger than the import (in 2008 – 110,000 t and 70,000 t respectively). The factors determining the demand for yogurt include first of all the taste and health values followed by the consistency, nutritive value, content of fruit, package size and price. The factors determining the choices made by the consumers include also, in addition to the above mentioned ones, the quality of product seen as absence of preservatives, product brand and availability, packaging characteristics and promotional activities (GÓRALCZYK 2006).

Consumers preferences and behaviors

In the assessment of yogurt consumers preferences the issues such as the frequency and place of purchase, types and characteristics of yogurts and

importance of the brand were the subject of study. The studies showed that indifferent of the household size the consumers purchase yogurts a few times per week (48.6%) or every day (14.4%). The percentage of people purchasing that product rarely is small – a few times per month 12.6%, once a month 3.4%. No correlation was found between the frequency of purchase and the household income level. The higher number of household members indicates that there are probably children in the household that increase the consumption of yogurts although the per capita income in such households is lower than in the households consisting of one or two persons. Differences in the frequency of purchase related to the gender of the consumer have not been found either.

Indifferent of the frequency of purchase the consumers most frequently purchase one or two packages of yogurt (69%). More than four packages are purchased on one occasion by 18% of the buyers only. The number of packages purchased showed no correlation with the household size.

The purchase places structure indicates that the consumers purchase their yogurt most frequently in supermarkets and markets (16%), neighborhood shops (38%), and the least frequently in the discount shops (16%). The purchase place is correlated with the age (the elder people make their purchases more frequently in the discount and neighborhood shops while middle-aged persons in markets) and gender (men more frequently in markets and women in neighborhood shops).

The respondents most frequently indicated health, nutritive and dietetic values as the reasons for consuming yogurts (Fig. 2). On the other hand, the most frequently consumed yogurts were fruit (69%) and natural (11%) yogurts.

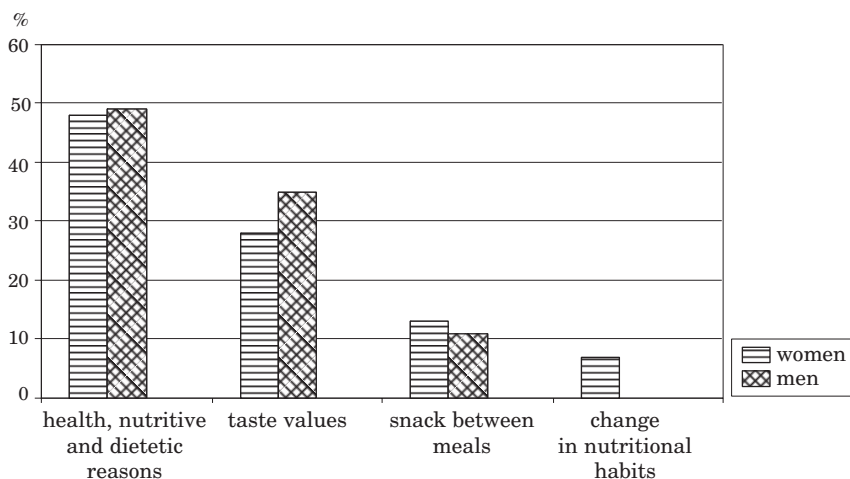


Fig. 2. Reasons for consumption of yogurts

Source: opinions by respondents.

The preferred flavors of yogurts were: strawberry (69%), sour cherry (46%) and peach (32%). The vast majority of the consumers (89%) is satisfied or definitely satisfied with the yogurts purchased. The reasons for the few cases of disappointment were the high price and sometimes a worse quality or taste.

The vast majority of consumers (77%) pays attention to the yogurt brand. The largest numbers of supporters were recorded for yogurts by Danone (56%), followed by Zott with Jogobella brand (46%) and Bakoma (32%). The majority of respondents negate the influence of advertising on the choice of yogurts purchased. Only 39% of the respondents declared noticing the advertising in the media and its influence on yogurt choice ranking that influence as moderate. The price on the other hand has a major influence on the choice (58% responses), which in turn is of little importance or unimportant to every third consumer. The systematic assessment of factors considered by consumers in selecting their yogurts is presented in Figure 3 where based on the scale from 1 (the most important) to 11 (the least important) those factors are presented according to their hierarchy. The taste of yogurt is the most important factor while the temptation to test or interest in a novelty product is the least important one.

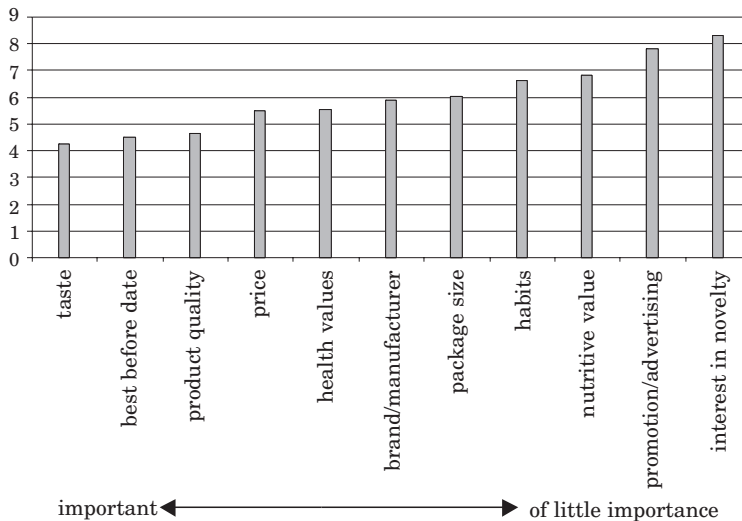


Fig. 3. Factors considered by consumers in their choice of yogurts

Source: Opinions by respondents.

The results of presented studies are consistent with, among others, the results of studies by P. Cymanow, who found similar preferences among yogurt consumers as concerns the choice of yogurt brand and type, factors influencing

the choice of yogurt and place of purchase (CYMANOW 2008, pp. 52-54). This means that clients behaviors in the analyzed market are universal and relatively constant.

Conclusion

The analysis of the studies results confirms the domination of three manufacturers in the market of yogurts, i.e. Danone, Zott and Bakoma, the products and established brands of which are purchased the most frequently by yogurt consumers. The interest in yogurts results mainly from their health, dietetic and taste values although the choice of a specific product is also influenced by the price, best before date and product quality understood in a variety of ways. The market of yogurts is characterized by a high level of innovation which results in a continual increase in consumption and frequency or purchases. Fruit yogurts enjoy the highest interest among the consumers and the offer of those products expands continually as concerns the width and depth of the products range, which is an example of good perception of consumer needs.

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