Exploring the Factors Influencing Consumers' Choice of Retail Store When Purchasing Fresh Meat in Malaysia

Key words: fresh meat, retail, supermarkets, traditional markets, Malaysia

Abstract

This research explores the preferred place for Malaysian consumers to purchase fresh meat. From four focus group discussions, participants indicated that their decision to purchase fresh meat from either a modern retail outlet or the traditional market was influenced by five key variables: perceptions of freshness, Halal assurance, a good relationship with retailers, a competitive price and a pleasant environment for shoppers. Results were subsequently validated in a quantitative survey of 250 respondents in the Klang Valley. Despite the increasing number of supermarkets and hypermarkets, not only are the traditional markets able to coexist with modern retail formats, but they remain the preferred place for respondents to purchase fresh meat.

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Introduction

Globalisation of the food retail system has impacted on the distribution and marketing of fresh food. For most developing countries, including Malaysia, traditional retail formats are being replaced by supermarkets and hypermarkets (Goldman et al. 1999).

In many parts of Western Europe and North America, modern retail outlets now dominate the food retail market (Chen et al. 2005). An increasing number of modern retail outlets is also being observed in Latin America and Asia (Reardon et al. 2005), where increasing population and rising personal disposable income is resulting in significant shifts in the food demand. According to Reardon et al. (2003), supermarkets are perceived to be the place where more wealthy consumers choose to shop. However, modern retail formats struggle to maintain their position in the market for those consumers who do not have sufficient income. Irrespective, in the six leading Latin American countries, modern retail formats now account for 45-75% of sales. In Asia, ACNielsen (2003) reports that the supermarkets average share of overall food retail sales (excluding fresh food) is 33% for Indonesia, Malaysia and Thailand, and 63% for the Republic of Korea, Taiwan and the Philippines.

In Malaysia, the structure of food retailing has changed dramatically over the last few decades. In previous years, the only retail formats were the traditional markets, grocery stores or mini-markets. Consumers purchased almost everything there including fresh fruit and vegetables, meat, chicken and fish, and other household supplies like dry food, bread, detergents, stationery and toys.

However, since the 1990's, the food retail industry in Malaysia has experienced tremendous growth. Modern retail outlets such as supermarkets and hypermarkets now dominate the retail food trade (Shamsudin and Selamat 2005). With new retail outlets emerging, consumers are reviewing where they will do the majority of their grocery shopping. In 1995, for example, the number of supermarket shoppers increased 1.5 times, while hypermarket shoppers have more than doubled (Eight Malaysia Plan 2001 – 2005). As reported by Abdullah et al. (2011), the average number of supermarkets and hypermarkets in Malaysia increased 2.1% and 26.8% respectively, from 2003 to 2008.

In parallel with the development of the food retail industry, the behaviour of consumers in Malaysia has also changed. Malaysian consumers are experiencing dramatic changes in their lifestyle, which impacts on the way they purchase their food. These factors include:
(1) an increase in personal disposable income. This has increased the ownership of both refrigerators and microwave ovens, which has changed the purchasing habits of consumers (Shamsudin and Selamat 2005). For instance, in the past, perishable goods were bought from traditional markets on a day-to-day basis. Owning a refrigerator allows consumers to shop less often as now they have the capacity to store perishable products for 1 to 2 weeks;
(2) the need for convenience. With more women entering the work force, time is scarce and therefore the demand for convenience is high. Convenience means more than just a one-stop store for working women. According to Geuens et al. (2003), supermarkets and hypermarkets provide convenience for shoppers in terms of providing facilities such as ample car space,

proximity to other shops, extended trading hours and the width and depth of the product range;

(3) a greater awareness of food safety and food quality issues. Becker et al. (2000) suggested that the place of purchase provides an important and trusted source of information for consumers on the safety of the meat they intend to purchase. Consumers often assume that fresh food being offered in a clean and tidy supermarket is safer to eat than the product available from an unclean and disorganised market (Berdegue et al. 2005). More consumers are purchasing more fresh meat from modern retail outlets because they believe that it is safer; and

(4) changes in diet. Malaysians are eating more healthy food. Shaharudin et al. (2010) confirmed that the purchase of organic meat has increased in Malaysia as consumers have become more concerned with the use of antibiotics, vaccines and growth promotants in poultry and cattle production. However, the availability of food that has been organically produced is a problem faced by many consumers in Malaysia. As mentioned by Shamsudin and Selamat (2005), organic food is mainly sold in modern retail outlets and is rarely found in traditional markets.

The emergence of modern retail outlets has impacted on both the traditional food retail environment and consumer behaviour in Malaysia. How consumers have responded to this complex situation is the main focus of this paper. As very little research has been undertaken to explore the food shopping behaviour of Malaysian consumers, this research project sought to identify which factors were most influential in the consumers' choice of retail outlet when purchasing fresh meat and to explore why consumers continue to shop at traditional markets when they have the opportunity to purchase from modern retail outlets.

Retail formats in Malaysia

Food distribution channels in Malaysia can be divided into two broad categories: the old and the new. Different channels cater for different segments of the Malaysian population. The old format consists of traditional markets and grocery stores (mini-markets). The traditional market, which comprises wet markets, fresh markets, night markets and farmer's markets, are popular among consumers when purchasing fresh food. The traditional market has been defined as a market with little central control or organisation, that lacks refrigeration, and does not process fresh foods into branded goods for sale (Trappey and Lai 1997). Goldman et al. (1999) described a typical wet market as an agglomeration of small vendors, where each vendor specialised in one fresh food line (meat, fish, fruit or vegetable) or in a sub line (fruit and vegetables). Traditional retailers complement each other as they offer a full assortment.

In Malaysia, supermarkets began to emerge in the early 1960's. The Weld Supermarket was the first modern supermarket to be opened in Kuala Lumpur in 1963, and was initially built to cater for expatriates who were working and living in the city. During the 1970's, modern supermarkets started to expand with the entry of several foreign ventures into Malaysia. By 1984, Zainal Abidin (1989) [cited in Roslin and Melewar (2008)] was describing the 'supermarket war' in Malaysia.

The new emerging retail formats are supermarkets, hypermarkets and convenience stores. According to Perrigot and Cliquet (2006), the basic concept of a hypermarket is described as 'everything under the same roof'. Perrigot and Cliquet (2006) then further elaborate the concept of a hypermarket as: (1) having a large floor space to hold the widest assortment of products and providing a large parking lot for shoppers; (2) implementing a discount pricing policy, and (3) self-service techniques based on effective merchandising and sales promotion. Cheeseman and Wilkinson (1995) described supermarkets as self-service stores, which offer one stop shopping, value for money and hold a large product selection in pleasant surroundings. Trappey and Lai (1997) add that most supermarkets have facilities to process fresh foods and use a wide range of refrigerated facilities to hold chilled and frozen product. Although supermarkets' merchandise assortment is described as limited, their retail strategies resemble the hypermarkets (Roslin and Melewar 2008). Their strategies to attract consumers include focusing on the merchandise width and depth while maintaining a low price. Convenience stores represent around 11% of retail sales and are located in major urban centres and along highways to capture those consumers who prefer convenience (Pricewaterhouse Coopers 2006). These stores offer a greater variety of products, longer hours of operation and lower prices compared to the traditional grocery stores.

In Malaysia, modern retail formats are mainly located in the major urban centres (Shamsudin and Selamat 2005). Most hypermarkets are located in the states where the population density is higher and more affluent – Selangor, Kuala Lumpur and Penang. In 2003, there were 240 supermarkets and 30 hypermarkets in Malaysia (Euromonitor International 2010). Five years later, the number of supermarkets in Malaysia had increased to 265 and the number of hypermarkets had increased to 90 (Table 1).

Table 1. Number of modern retail outlets in Malaysia

	2003	2004	2005	2006	2007	2008
Supermarkets	240	242	245	255	260	265
Hypermarkets	30	40	50	60	80	90

Source: Adapted from Euromonitor International (2010)

Foreign-owned retailers dominate the retail sector in Malaysia. In 2005, 83% of hypermarkets in Malaysia were foreign-owned (Malaysia 2006). Among the foreign-owned retailers are Giant (Hong Kong), Jaya Jusco (Japan), Carrefour (France), Tesco (UK) and Makro (Holland). Local retail chains include The Store, Parkson, Mydin, Bintang and Econsave.

More recently, modern retail outlets have started to spread into small towns in rural areas. In Malaysia, Tey et al. (2008a) indicated that the second wave of modern retail development has seen hypermarkets open in Banting, Nilai and other mid-sized towns in Malaysia.

Although modern retail formats are dominating the food retail sector, supermarkets and hypermarkets generally concentrate on processed, dry and packaged foods, rather than fresh food items. The move towards fresh food lines is generally slow. ACNielsen (2003) report that between 80% to 90% of Asian shoppers still use traditional markets regularly. According to Goldman et al. (1999), supermarkets in other Asian countries like China, Indonesia, Japan, Singapore and Taiwan, are unable to dominate fresh food lines due to serious problems in handling the fresh food category. In the traditional markets, retailers are able to fulfil consumer's specific requirements such as requesting a specific size, quantity and quality. In terms of meat items, Malaysian consumers want it 'live and warm'. This situation cannot be experienced in modern retail outlets where most meat items are frozen or chilled.

Despite the dominance of modern food retailers in the West, traditional retail formats are still important in Malaysia, for they continue to capture a high percent of the groceries purchased (57%), compared to only 31% for supermarkets and hypermarkets (Idris 2002). Consequently, both retail outlets are expected to coexist for some time to come.

Methodology

In the absence of any empirical literature, given that the research problems identified were new to Malaysia, the study was undertaken using two different approaches. In the first exploratory stage, focus group interviews were considered to be the most appropriate means of data collection. According to Sim (1998, p. 346), a focus group is defined as a group interview – centred on a specific topic (focus) and facilitated and co-ordinated by a moderator – which seeks to generate primarily qualitative data by capitalising on the interaction that occurs within a group setting. Kruger and Casey (2000) claimed that focus groups are seen as a method to better understand how people feel or think about an issue, product or service. Through a guided discussion, participants within a focus group discussion are allowed to interact with each other in a way that uncovers a range of insights on the topic of conversation (Szwarc 2005). Focus group interviews have been widely used in exploratory research and are a popular technique to gain a preliminary understanding of consumer preferences (Verbeke and Viaene 2000).

For the focus group discussions, participants were selected using convenience sampling. Convenience sampling is defined as a non-probability sampling technique that attempts to obtain a sample of convenient elements (Malhotra et al. 2008, p.272). Malhotra et al. (2008) confirms that convenience samples are suitable for focus group interviews, pre-testing questionnaires or for the conduct of pilot studies.

Initially, the sample was drawn from the social network of the researcher (colleagues, friends, neighbours and relatives). After participating in the discussions, respondents were then asked to identify other potential participants who might be interested in joining the next group discussion.

For this study, a total of four focus group interviews were conducted between October and November 2007 in Kuala Lumpur. All focus group interviews were held in a seminar room which was equipped with recording facilities. Even although the focus group interviews were held in a seminar room, the researcher ensured that the discussions were conducted informally and in a relaxed manner to encourage spontaneous comments from the participants. Each focus group discussion followed an interview guide which consisted of a check list of questions on several sub-topics. The interview guide contained mostly open-ended or unstructured questions. This allowed participants to answer in their own words and to discuss a variety of related issues. The interviews were conducted by a moderator who facilitated the group discussions.

Participants for the focus group discussions were the primary food shoppers for the household. A total of 45 participants joined the discussions; 9 in Focus Group 1 (FG1), 15 in both FG2 and FG3, and 6 in FG4. As highlighted by Rabiee (2004), the participants of a focus group discussion cannot be considered to be representative of a specific population, therefore, the findings arising from the discussions cannot be utilised in any statistical way nor can any inferences be made about the population from which they were drawn.

The findings from this first phase of the study were considered to be both preliminary and necessary, for in the absence of any substantial body of literature, it was necessary to identify the key determinants of choice before proceeding to a quantitative procedure.

The second stage utilised the survey method, which required the development of a structured questionnaire. Tull and Hawkins (1990) confirm that the survey method can provide data on attitudes, feelings, beliefs, past and intended behaviours, knowledge and personal characteristics. Furthermore, the survey method is the most common method of primary data collection in marketing research. It is simple to administer and can provide reliable data where responses are limited to the stated alternatives (Malhotra et al. 2008).

In this study, the central location personal interview method, based on selected shopping malls and traditional markets, was considered to provide the most appropriate means of data collection. According to Hair (2008), the shopping mall intercept method is relatively inexpensive and very convenient because the researcher does not need to spend much time or effort in securing a person's willingness to participate in the interview because both are already at a common location. Potential respondents are intercepted and interviewed as they arrive or as they are about to leave the shopping precinct.

In this study, the Klang Valley was chosen as the research area for a number of reasons: (a) geographically, the Klang Valley lies between Selangor state and the Federal Territory which includes large cities like Kuala Lumpur (the national capital of Malaysia), Putrajaya, Shah Alam and Klang; (b) the availability of both modern retail outlets and traditional markets; (c) it is a region with holds a good mixture of potential respondents with different levels of education, income distribution and ethnicity, which are anticipated to have some impact on the purchase and consumption of fresh meat; and (d) due to limited budget and time constraints, data were collected by focusing in one geographic area only.

The questionnaire was divided into three sections. Section One gathered information regarding the store choice behaviour of the respondents and their perceptions of the quality of fresh meat purchased from either a modern retail outlet or a traditional market. Section Two was organised to investigate consumers purchasing behaviour for fresh chicken and/or the purchase of fresh beef.

The target meats for this research were highly influenced by the religion, ethnicity and the cultural background of the Malaysian population. It was reported that 61% are Muslim, 20% are Buddhist, 9% are Christian, 6% are Hindu and 4% are others (The World Factbook 2009). Chicken was chosen due to the high consumption among Malaysian consumers and the acceptability by most religions (Paraguas 2006). According to the FAO, the consumption per capita of poultry was 33.8 kg (Tey et al. 2008b). Beef was the other target meat for this research. Beef consumption (5.8 kg) among Malaysians is higher than mutton (0.5 kg) (Paraguas 2006; Tey et al. 2008b). As the majority of Malaysians are Muslim and the consumption of pork is forbidden, pork was not selected for this research.

The importance of socio-demographic factors as determinants for the purchase of fresh meat were presented in Section Three. Bonne and Verbeke (2006) and Krystallis and Arvanitoyannis (2006) demonstrated that correlations existed between socio-demographic characteristics such as income, education level, gender, family size and the presence of children in the household and the quality of the fresh meat purchased by consumers.

The collection of socio-demographic variables also enables the sample to be compared with data from the Malaysian Department of Statistics and other research studies. In this study, the majority of respondents were female (86%), which was somewhat higher than that collected by Nooh et al. (2007)(63%) and Ahmad and Juhdi (2008)(64%). Nevertheless, women continue to do the majority of the household shopping in Malaysia.

With regards to the age group of respondents, more than half of the respondents were aged between 26 to 44 years old. Haque and Khatibi (2005), Ghazali et al. (2006) and Wan Omar et al. (2008) also recruited a large number of participants from the younger generation. However, the small number of elderly respondents was no cause for alarm as data available from the Malaysian Department of Statistics (2009) indicated that 64% of the Malaysian population was in the age group of 15 to 64 years old. In this study, 98% of the respondents who participated in the survey fell within this range.

The fieldwork was carried out from December 2008 until February 2009 at a number of traditional markets and modern retail outlets around the Klang Valley region. In all, 260 respondents were interviewed.

The data was analysed using univariate data analysis (descriptive analysis and cross-tabulations) and multivariate data analysis (cluster analysis) using SPSS v.17.

Cluster analysis was undertaken to identify potential groups of consumers who preferred to purchase their fresh meat from either a modern retail outlet, traditional markets or from both retail outlets. Having no knowledge as to how many groups might be present in the data set, the researcher employed hierarchical cluster analysis in the first instance (Hair et al. 1998). Using a simple measure of homogeneity - the average distance of all observations within the clusters - hierarchical cluster analysis suggested 2-5 cluster solutions. In the second step, the k-means clustering algorithm was employed, testing each of the potential cluster solutions.

According to Hair et al. (1998), the selection of the final cluster solution is a subjective matter and requires substantial judgement by the researcher. From a marketing perspective, Kotler and Armstrong (2006) identify four criteria which impact on the final cluster solution:
(1) measurability. This refers to the effective size and purchasing power of the cluster. Clustering should be undertaken using variables that are known to impact or to influence the likelihood of purchase;
(2) accessibility. This involves the degree to which a segment can be effectively reached and served. In this instance, accessibility relates to the ability of a retailer to direct its marketing activities at a specific segment;
(3) substantiality. The segment should have a sufficient number of consumers so that it is profitable for the firm; and
(4) actionable. This criterion describes the degree to which a retailer can develop effective marketing programs which are able to attract, serve, satisfy and build relationships with customers.
On these criteria, the results indicated that a two cluster solution was optimal.

As the respondents who participated in this study were drawn only from the Klang Valley, their behaviour is unlikely to be representative of the whole of Malaysia, especially for those residents of East Malaysia (Sabah or Sarawak) and those who reside in rural areas.

Results and discussion

Store Choice

In general, participants from each focus group purchased chicken and beef from both modern retail outlets and traditional markets. However, the majority of respondents preferred to buy chicken and beef from traditional markets. When participants were asked why they selected traditional markets over modern retail outlets, freshness and the guarantee of Halal were mentioned by all four groups. Nevertheless, there were a small number of participants who chose to buy fresh meat occasionally from modern retail outlets.

The quantitative findings supported the findings from the focus group studies, for 173 respondents (66%) purchased the majority of their fresh meat from traditional retail market outlets (Table 2).

Table 2. Principal place of purchase for fresh meat

Modern retail outlets	**N**	**%**
Hypermarket	52	20.0
Supermarket	35	13.5
Traditional markets		
Wet market/fresh market	95	36.5
Night market	31	11.9
Farmers market	17	6.5
Grocery store	17	6.5
Wholesale market	13	5.0
Total	260	100.0

Respondents were then presented with a group of statements which sought to measure the relationship between the respondents' perceptions of food quality and their preferred place to purchase fresh meat. The questions required respondents to either agree or disagree with each statement on a six point Likert scale, where 1 was "I disagree a lot" and 6 was "I agree a lot". To group respondents according to their preferred choice of retail store when purchasing fresh meat, a two-stage cluster analysis was applied (Hair et al. 1998). On this occasion, after an extensive subjective review of the alternatives, a two cluster solution was considered to be optimal, where Cluster 1 described "modern retail shoppers" and Cluster 2 described the "traditional market shoppers". Differences between the clusters on each of the clustering variables were identified using the independent samples t-test (Table 3).

"Modern retail shoppers" had a higher mean score on convenience and enjoyed shopping at modern retail outlets because the store offered a greater variety of fresh food and the fresh meat was displayed better. This group were less concerned about building any long term or enduring relationship with the vendor and they generally disliked the idea of going to a traditional market merely to purchase fresh meat.

"Traditional market shoppers" believed that the meat was both fresher and cheaper in the traditional market. They were more loyal as they purchased fresh meat from the same vendors and were prepared to go out of their way to purchase fresh meat from traditional markets, even although they often purchased other household products from supermarkets. They also enjoyed the opportunity to bargain on price.

Table 3. Respondents level of agreement/disagreement with each of these statements according to cluster

	Cluster 1		Cluster 2		P
	Mean	SD	Mean	SD	
The quality of the fresh meat available is better in supermarkets	4.82	0.90	3.62	1.26	0.000
Supermarkets operate everyday while traditional markets operate only on certain days of the week	5.02	1.28	4.27	1.53	0.000
Consumers can bargain on price in wet markets	4.55	1.36	5.29	1.02	0.000
Its more convenient to shop in supermarkets because I can buy all my groceries at the same time	5.59	0.64	4.95	1.07	0.000
I often meet my friends when I shop at traditional markets	2.84	1.25	3.79	1.45	0.000
Supermarkets offer a wider range of fresh food	5.33	0.83	4.19	1.28	0.000
At traditional markets, the vendors remember my name	3.34	1.56	4.24	1.44	0.000
I cannot buy the other household items I need if I shop at traditional markets	4.77	1.27	3.91	1.44	0.000
I go to supermarkets because of the shopping points I get	3.91	1.58	3.47	1.44	0.027
The children feel comfortable when I shop at supermarkets	5.17	0.95	4.44	1.29	0.000
Traditional markets seldom have a good or clean environment	4.96	1.14	4.07	1.12	0.000
Supermarkets offer better customer service than the traditional markets	4.96	0.93	4.26	1.21	0.000
I can return easily goods if I'm not satisfied when I buy them from traditional markets	3.74	1.33	4.23	1.22	0.004
I buy my other household goods from supermarkets but I buy my chicken and beef supplies from traditional markets	3.19	1.29	5.30	0.99	0.000
Traditional markets offer better quality meat at a much cheaper price	3.54	1.18	5.01	1.067	0.000
I can return easily goods that I'm not satisfied with after purchasing it from supermarkets	4.33	1.36	3.85	1.45	0.011
Fresh meat is displayed better in supermarkets	5.19	0.86	4.64	1.02	0.000
Chicken and beef are fresher in traditional markets	4.14	1.19	5.51	0.79	0.000
I prefer to buy my fresh meat from the same vendor in the traditional markets	3.96	1.25	5.36	0.84	0.000
Products in the supermarkets is clearly priced	5.48	0.65	5.23	0.89	0.014
Retailers in the traditional market are more knowledgeable about the products they sell	4.22	1.25	5.23	0.91	0.000

where 1 is "I disagree a lot" and 6 is "I agree a lot"

To verify the findings, a cross-tabulation was used to investigate any relationship between the clusters that had been identified and the preferred place of purchase. Respondents belonging to Cluster 1 purchased the majority of their fresh meat from hypermarkets (79%) and supermarkets (75%)(Table 4).

Table 4. Place of purchase by cluster

	Cluster 1		Cluster 2		Total
	n	%	n	%	
Modern retail outlet:					
Supermarket	24	75.0	8	25.0	32
Hypermarket	38	79.2	10	20.8	48
Traditional market:					
Wet market/Fresh market	16	18.6	70	81.4	86
Farmers market	2	13.3	13	86.7	15
Night market	3	10.3	26	89.7	29
Wholesale market	5	38.5	8	61.5	13
Grocery store	6	35.3	11	64.7	17
Total	94		146		240

[Pearson chi-square = 79.16, df = 6, p = 0.000]

Conversely, those respondents from Cluster 2 were more likely to buy a greater proportion of their fresh meat from the night market (90%), farmers market (87%) and the wet market/fresh market (81%).

Although socio-demographic variables have been widely used for the purpose of segmenting and profiling consumers, as the data is relatively easy to collect, measure and analyse, much of the literature has demonstrated that the socio-demographic variables are ineffective in segmenting consumers. In classifying shoppers, Boedeker and Marjanen (1993) found that socio-demographic characteristics provided a very narrow perspective of consumer behaviour. According to Romano and Stefani (2006), using only demographic variables provided a very poor classification due to the weak correlation between the socio-demographic variables and the purchase decision. In this research, variables such as gender, age, marital status, highest level of education attained, race and income were found not to be significantly different between the clusters.

Factors Attracting Consumers to Purchase Fresh Meat from Modern Retail Outlets and Traditional Markets

A number of factors were mentioned during the focus group interviews which were then integrated under similar themes. A total of five themes were identified as the major factors which most influenced the consumers' decision to purchase fresh meat from a modern retail outlet or a traditional market (Table 5). The factors are not ranked according to importance as the purpose of the preliminary study was to identify the variables that were most often used by Malaysian consumers in their decision to purchase fresh meat from a retail store.

Further confirmation was achieved when a cross-tabulation was used to differentiate the variables which best described the quality of the meat purchased according to those who opted to buy from modern retail outlets and those who preferred to purchase fresh meat from the traditional markets (Table 6).

Table 5. Factors attracting consumers to purchase fresh meat from modern retail outlets and traditional markets

Factors attracting consumers	Modern retail outlets	Traditional markets
Freshness	√	√
Halal guaranteed		√
Good relationship with retailers		√
Competitive price	√	√
Good environment	√	

√ : represent responses mentioned from focus group discussions

Table 6. Variables respondents consider to differentiate the quality of fresh meat by cluster

	Cluster 1 (94)		Cluster 2 (146)	
	N	%	N	%
Freshness	67	71.3	140	95.9
Good environment	50	53.2	39	26.7
Halal guaranteed	24	25.5	44	30.1
Competitive price	22	23.4	15	10.3
Good relationship with retailers	3	3.2	34	23.3

Freshness

Freshness was often cited as one of the most influential variables impacting on the consumers' decision to purchase fresh meat (Verbeke and Viaene 2000). In the qualitative findings, freshness was a factor which attracted consumers to shop at both outlets. The quantitative and qualitative findings were very much similar where respondents who purchased fresh meat from both retail outlets cited freshness as that variable which was best able to differentiate the quality of the meat offered by traditional markets (96%) and modern retail outlets (71%). The findings of this study are similar to earlier research which indicated that consumers consider freshness alongside factors such as the reputation of the place of purchase (Hsu and Chang 2002). However, freshness was perceived differently according to the place of purchase.

According to Kennedy et al. (2004), in order to judge freshness, product appearance, which comprises colour and the physical form of the meat, is utilised. How the product looks is important to judge the freshness of the meat, especially when meat has been packaged in retail outlets (Warriss 2000). At the time of purchase, consumers rely entirely on visual cues. For instance, in determining the freshness of beef, the meat was expected to have a bright red colour. One participant from a focus group commented:

'Colour indicates the freshness of the beef. Red implies that the beef is still new and the cow has just been slaughtered'.

In Malaysia, consumers prefer shopping at traditional markets for fresh meat. They emphasised the freshness of meat in traditional markets, given that fresh meat products were slaughtered early in the morning and delivered directly to retailers in various locations. Goldman and Hino (2005) described the freshness of the meat available from the traditional markets as "warm" (just recently being killed) and not chilled or frozen. The situation in traditional markets in Malaysia is similar to Taiwan, where fresh meat is displayed on counters or hung on hooks (Hsu and Chang 2002). Consumers are given an opportunity to touch the meat to determine its freshness.

The main reason why consumers seek freshness when purchasing meat is associated with food preparation. If the products purchased are not fresh, the meal will not be tasty or healthy. A participant from Focus Group 4 commented:

'Freshness will affect the taste of your food. If the beef is fresh, you can taste the 'sweetness' of the beef in your cooking'.

This finding corresponds to other studies by Zinkhan et al. (1999) and Goldman and Hino (2005). It is important to purchase fresh food to maintain good health and enjoy the taste of food. Therefore, fresh food like beef, fish and poultry are purchased at traditional markets, for this is where the requirements for freshness can best be met (Zinkhan et al. 1999).

Modern retail outlets have the advantage of offering fresh meat in refrigerated display units. Fresh meat in modern retail outlets is pre-cut and pre-packaged in sanitised conditions, then chilled and displayed on temperature controlled shelves (Hsu and Chang 2002). Younger participants from FG2 occasionally purchased beef and chicken from supermarkets as they were attracted to the clean, chilled and nicely packed meat. Umberger et al. (2003) added that the freshness of the meat purchased from supermarkets was determined by the label attached to the product. According to Bonne and Verbeke (2006), the label can provide information such as the slaughter date, the date the meat was processed and the origin of the meat. Furthermore, supermarkets and hypermarkets have the advantage of good retail procurement logistics, technology and inventory management (Reardon et al. 2003). In contrast, the food safety issue in traditional markets is questionable as the majority of retailers do not have the proper storage space, refrigeration or the knowledge to prevent fresh meat from becoming contaminated.

Halal guaranteed

When participants were asked what they look for in their decision to purchase chicken and beef, the majority of respondents in all four groups indicated the importance of Halal. This finding was similar to Shafie and Othman (2006) who reported that 89% of consumers highlighted the importance of Halal in their decision to purchase meat. Halal and the relationship between butchers and customers is closely related. According to one participant:

'The question of Halal and where I buy my meat supplies from is important to me and my family. This is why I buy from the same butcher at the same fresh market every time I want to buy beef. I am confident on the source – where the seller gets the beef from'.

Similar findings were presented by Bonne and Verbeke (2006), who identified the role of religion in the consumption of fresh meat. For fresh meat to be guaranteed Halal, it was closely related to the method of slaughter and the presence of an Halal certificate or label. In the absence of any legitimate third party certification, trusting their preferred butcher at the point-of-purchase provided the desired assurances. Trust is highly associated with the place of purchase for meat products, as most Muslims prefer to purchase fresh meat from an Islamic butcher who operates in a traditional market. Consumers place much value on being served by butchers of the same ethnic race and religion in the traditional market (Goldman and Hino 2005; Bonne and Verbeke 2006).

However, there was little difference between the respondents' perceptions that the fresh meat was guaranteed Halal when purchased from different outlets. Whereas some 25% of the respondents who shopped from modern retail outlets believed that the meat was Halal, 30% of the respondents who purchased meat from the traditional markets believed that the meat was Halal.

Respondents who purchased their fresh meat from supermarkets and hypermarkets believed that the meat was Halal from the Halal certificate or label attached to the package. Fresh meat that is guaranteed Halal carries a Halal food certificate and label. Halal food certification refers to an examination of the processes undertaken in the preparation, slaughtering, cleaning, processing, handling, disinfecting, storing, transporting and the management of the food product (Wan Omar et al. 2008). In Malaysia, the Department of Islamic Development Malaysia (JAKIM) is the main organisation which provides Halal certification and is the main source of information for consumers regarding the Halal status. Most of the local fresh meat available from modern retailers carries the Halal logo produced by JAKIM, while imported meat carries their own Halal logo. The Halal logo attached to pre-packs of chicken and beef may provide a significant advantage compared to vendors from traditional markets that do not have Halal certification.

However, this factor alone does not encourage consumers to buy fresh meat from modern retail outlets. Consumers, especially the elderly, are less likely to buy meat from supermarkets or hypermarkets because they lack confidence (Bonne and Verbeke 2006). The majority of elderly participants still prefer to buy meat from their preferred butcher. One participant commented that:

> 'I will try my very best to avoid buying imported beef as I am not confident with the Halal status of the meat. I wonder why imported beef does not carry Halal-JAKIM labels?'.

Another respondent added:

> 'I still have doubt with the Halal system in our country. This is why I do not buy my fresh meat from supermarkets. I only buy my chicken and beef supplies from Muslim butchers'.

The credibility of the information and the personalised service provided by traditional vendors was found to outweigh the institutionalised quality system for Halal certified fresh meat in supermarkets. The assurance of an Halal logo has only managed to capture younger consumers rather than the majority of consumers. Younger shoppers are more confident with the Halal logo displayed on the packages of chicken and beef sold in modern retail outlets. Furthermore, they are strongly in favour of the Halal label and the slaughtering method for the reason of convenience shopping (Bonne and Verbeke 2006).

Good relationship with retailers

Initially, the preliminary research findings suggested that a good relationship with retailers was a factor attracting consumers to purchase fresh meat from traditional markets. The survey results verified the preliminary research findings, suggesting that a good relationship between vendors and customers in the traditional market (23%) was an important motive compared to those shoppers who purchased meat in a modern retail outlet (3%). Traditional markets constituted a place not only to purchase perishable goods, but also provided a place for meeting acquaintances. Relationships are built not only between vendors and customers, but also between buyers. For example, buyers exchange information about the quality of products or which stalls offer the best bargains. Traditional markets are perceived as a place to foster social relationships (Zinkhan et al. 1999).

Personal relationships built between retailers and consumers developed trust for both groups. Zinkhan et al. (1999) stated that the respondents who often visit the street market in Sao Paulo know each other by name and often engage in social conversation. Goldman and Hino (2005) reported a similar result as Arab Israelis prefer to buy fresh meat from a known and trusted source. This ensures customer loyalty as consumers continue to purchase from the same retailer. In this study, several participants from the focus group discussions made similar statements about the importance of developing a good relationship with retailers:

> 'I only buy chicken at Muslim butchers because of trust and the good relationship I have with butcher that I have been visiting for many years. The opportunity to interact with the butcher is seen not only as a mean to guarantee that the meat is safe to eat and slaughtered according to the Islamic way, but may help building relationships between retailers and consumers".

> 'I recognise very well the vendor. This is why I buy my beef supplies from her'.

Abu (2004) agrees with the importance of personal interaction between vendors and customers which eventually develops customer loyalty. Customers are more loyal to a store which offers warm and friendly service. The personalised services offered by the butcher such as cleaning the chicken or cutting the meat according to the consumers' preferences, encourage loyalty. Vendors in traditional markets often give feedback to customers who are looking for quality products. Factors such as the ability the truthfully answer customers' questions, giving regular customers individual attention and vendors' knowledge of their product attracts customers to shop from a particular retail outlet (Dabholkar et al. 1996). Suryadarma et al. (2010) revealed that 40% of traditional retailers cited politeness as the main attribute of their business success. In addition, more consumer-friendly services such as giving priority to frequent customers, giving discounts, being honest, providing home delivery services and the availability to pay in instalments were employed as strategies by traditional retailers in Indonesia to become more competitive in the retail food market. The social environment in traditional markets provides a leisurely experience for consumers which cannot be experienced when shopping at supermarkets and hypermarkets. Furthermore, there are no channels for immediate feedback for customers who shop from modern retail outlets.

According to Verbeke and Vackier (2004), meat is considered to be a high involvement product in the food product category, which requires consumers to access enough information about the product to evaluate the product attributes carefully before purchase. To reduce the perceived risk in purchasing fresh meat from a retail outlet, a long-term personal relationship with the butcher is a common approach. Yeung and Yee (2003) demonstrated how personal information from experts (butchers) reduced the perceived risk associated with the purchase of meat. Irish consumers were found to be more confident when they purchased fresh beef from their preferred butcher as the meat was fresher, of higher quality and the service provided by butchers was better than supermarkets, which led to a reduction in the level of perceived risk (McCarthy and Henson 2005). Vendors were perceived as experts, where consumers relied on them to provide safe and high quality products (Figuie et al. 2006).

Competitive price

From the focus group discussions, competitive price was mentioned as a reason for consumers to buy their fresh meat from both outlets. Similarly, the quantitative findings revealed that there was little difference in consumer perceptions as to which retail outlet: modern retail outlets (23%) or the traditional market (10%) offered the lowest price. Past research reveals that the price of food is much lower in supermarkets (Aylott and Mitchell 1999; Chung and Meyers 1999). However, in order to compete with modern retail stores, traditional market vendors must not only maintain the quality of their fresh food, but ensure their prices are competitive (Faiguenbaum et al. 2002). In both studies, differences in the price of fresh meat between retail stores were not investigated.

Generally speaking, retail outlets which offer good quality products at a lower price will attract more consumers. According to Trappey and Lai (1997), offering lower prices is an important reason for consumers to shop at supermarkets. The fact that the price in traditional markets is higher motivates consumers to buy goods from hypermarkets or supermarkets (Farhangmehr et al. 2000). Modern retail outlets are capable of offering more competitive prices for the products they stock as they have the economies of scale in procurement. Furthermore, competition between the major chains is forcing prices down. In Malaysia, modern retailers such as Giant, Tesco and Carrefour are engaged in a price war to entice consumers to purchase from their stores. Carrefour has cut prices for about 1,200 products and Giant is reported to have sacrificed profits in order to maintain their low-price leader position in the country (Arshad et al. 2006). While price wars may be advantageous for consumers, it does put pressure on local retailers to provide a similar price.

However, prices of fresh meat in the traditional market are not always cheaper than modern retail outlets (Farhangmehr et al. 2000; Hsu and Chang 2002). Hsu and Chang (2002) recorded the unit prices of various meat cuts from both retail outlets in Taiwan. Based on the data collected, several fresh meat products in traditional markets were sold at a higher price compared to supermarkets. For example, retailers in the traditional markets in Taiwan sold a whole chicken for $5.80/kg compared to $2.90/kg from supermarkets. In contrast, Block and Kouba (2006) found that fresh meat was at least 10% cheaper at corner stores in Chicago than supermarkets.

Nevertheless, shoppers who shop in the traditional markets enjoy competitive prices, for they are allowed to bargain, whereas the price in modern retail outlets is fixed. The majority of participants from the focus group discussions (66%) mentioned that they felt satisfied with their purchases from traditional markets after gaining the product through negotiation with vendors. As a result of having a good relationship with vendors, shoppers were able to bargain on price. This cannot be experienced when shopping from modern retail outlets.

Zinkhan et al. (1999) explained how bargaining is a cultural value which occurs in most markets in Brazil. Maruyama and Trung (2007) described bargaining as the 'art of shopping' and found that in Vietnam, consumers who wanted to bargain were more likely to shop in traditional outlets (traditional bazaars and mom and pop stores). Lui (2008) found that consumers who prefer to shop at wet markets in Hong Kong mentioned that through bargaining, they managed to: (1) pay less than the actual price of the product (paying only $10 if the goods cost $11), and (2) received additional products at no cost upon purchasing. Traditional retailers demonstrated that bargaining had symbolic value in reinforcing the tie between consumers and the retailer. This cultural tradition differentiates consumers' purchasing experience in the traditional markets from other modern retail outlets.

Maruyama and Trung (2007) suggest that shoppers who do most of their shopping from supermarkets do not consider bargaining to be useful. For them, obtaining products at a much cheaper price is less important in their decision to purchase. When shopping at a modern retail store, they search for superior products which are safer and better quality.

Although price is one of the key factors that influences consumers in their decision to purchase fresh meat from either a modern retail outlet or a traditional market, respondents in the main survey expressed their dissatisfaction over the rising price of the fresh meat that was available from both retail stores. In Malaysia, fresh chicken was found to be more affordable compared to the price for fresh beef. Not surprisingly, consumers' dissatisfaction over the increasing price of chicken has been more frequently reported in the media, compared to their dissatisfaction over the price of beef (Yatim et al. 2010; Zolkiply 2010).

Good environment

Store environment and layout may influence the consumer's choice of retail store (Baker 1990). The concept of store image is the way consumers 'see' the store in their minds (Farhangmehr et al. 2000). According to Yalch and Spangenberg (1990), the right use of colour, lighting, sound and furnishing may stimulate perceptual and emotional responses within consumers, which eventually affects their behaviour. Devlin et al. (2003) found that a store environment which caters for children, makes food shopping an uncomplicated task with clear signage and product labels, and was clean and tidy, was preferred by shoppers. Espinoza et al. (2004) further state that a good store atmosphere and pleasant surroundings may increase the consumers' willingness to buy.

The participants from all focus groups who purchased their fresh meat from supermarkets or hypermarkets mentioned that the pleasant store atmosphere was an influential factor in their store choice decision. The quantitative findings concur with the preliminary research findings, where 53% of respondents highlighted the cleanliness of the store as a motive to purchase fresh meat from modern retail outlets. Only 27% of respondents considered traditional markets to have a good environment.

Modern retail outlets do offer a good environment for shoppers. These modern retail outlets are described as clean and comfortable; the store is air-conditioned; it's easier to buy goods with the trolley provided; and modern retail formats are a suitable place to shop and to bring the children. Although the prices of some items may be relatively higher than traditional markets, consumers still shop at modern retail outlets due to comfort and good parking facilities (Abu 2004). The good environment provided by most modern retail outlets is also used as a marketing tool to attract more customers.

Respondents from the main survey considered the cleanliness of the store to be indicative of the quality of meat. Jabbar and Admassu (2009) revealed how cleanliness was measured by the hygiene of staff/butchers and premises. Their study demonstrated that consumers believed better quality meat was sold from shops that were cleaner, where staff wore clean clothes and used clean equipment to process the meat. Cleanliness of the equipment, washing the meat using clean water and the adoption of hygienic practices by butchers was perceived to improve the microbiological quality of meat (Rao and Ramesh 1988). Consumers in Ethiopia preferred to purchase their fresh meat in supermarkets compared to traditional butchers because of the different level of cleanliness between the retail outlets (Jabbar and Admassu 2009).

Most participants from the focus group discussions described traditional markets as crowded, hot and stuffy. This was not dissimilar to how consumers in Hong Kong described traditional markets: dirty, slippery, crowded, smelly, unorganised, poorly ventilated and noisy (Goldman et al. 1999). According to Hsu and Chang (2002), the floor in most traditional markets in Taiwan is wet and dirty. Furthermore, fresh meat products may be easily contaminated as the butchers do not wash their hands between handling fresh meat and doing other tasks. In Indonesia, many consumers complain about the dirty condition of wet markets and are often robbed by pickpockets (Muharam 2001). Cleanliness was seen as presenting a significant barrier for the traditional retail outlets to compete with modern retailers.

However, Suryadarma et al. (2010) revealed how cleanliness was seen to be one of the least important variables for traditional retailers to attract more shoppers. This is because, despite portraying traditional markets as having a poor environment, the traditional markets continue to offer goods and services which attract loyal customers. Similarly, Trappey and Lai (1997) indicate that a poor environment had little impact on shoppers. The traditional markets offered a more convenient location, a greater variety of products and superior product quality which far outweighed the inferior shopping atmosphere. The strong bond between vendors and their customers also explains why consumers continue to shop at traditional markets.

Conclusions

The results of the preliminary study provide a basis for identifying those factors which most influence consumers in their choice of retail store when purchasing fresh meat. Results from the main survey then confirmed and demonstrated that most Malaysians in the Klang Valley prefer to purchase their fresh meat from traditional markets. Even though modern retail outlets are expanding, purchasing fresh meat from traditional markets is still the preferred place of purchase in Malaysia. Some literature claims that traditional markets will soon be displaced, losing their customers to modern retailers who offer higher quality and safe products, one-stop shopping and a more pleasant environment for shoppers (Trappey and Lai 1997; Goldman et al. 1999; Reardon et al. 2003). The findings of this study demonstrate that consumers have not abandoned traditional markets when purchasing fresh meat, due to several pull factors such as having a good relationship with retailers, the meat is perceived to be of better quality (fresh) and Halal guaranteed, and the ability to bargain on price. Even though traditional markets do not provide a pleasant environment, they do create an environment in which interpersonal relationships thrive and the community is brought closer together. Shoppers visit traditional markets not only to buy goods, but also to visit friends and acquaintances.

On the other hand, supermarkets and hypermarkets have the advantage of offering a pleasant environment in which to shop for their patrons. For traditional retailers, it may be difficult for them to be competitive in providing such pleasant surroundings for their customers.

Retailers from both markets can capitalise on the store choice attributes which influence consumers' purchasing behaviour. For instance, Malaysians have emphasised the importance of cleanliness when shopping for fresh meat. If traditional retailers are to respond to these issues, intervention from the government and local authorities will be needed. Among the activities that need to be carried out to improve the cleanliness of the traditional markets are: (1) the construction of new markets; (2) ensuring that there are concrete floors, running water, appropriate sewage and waste disposal; (3) making it compulsory for vendors to attend training courses related to proper food handling and food safety before granting a license; (4) conducting regular and compulsory health testing for vendors, and (5) conducting regular inspections in terms of compliance to health and sanitation.

As issues involving Halal and the preference to purchase meat from a trusted vendor were important for Malaysians when purchasing fresh meat from a retail store, modern retailers must emphasise the importance of offering fresh meat that is guaranteed Halal. While most fresh meat in supermarkets and hypermarkets are labelled with a Halal logo, it is still insufficient for consumers to believe that the meat was slaughtered appropriately and according to Islamic rulings. Thus, modern retailers should provide personal assurances through monitoring the supply chain or establishing dedicated supply chains to ensure that the supply of fresh meat to supermarkets and hypermarkets are genuinely Halal.

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