Comparing the display of visually similar products in online grocery shopping platforms

Purpose

Online grocery shopping has dramatically increased during the pandemic. In the United States, online grocery sales were 3% of the overall market, and they have jumped to take 17% of the total market share during the pandemic (Johnson, 2022). Similarly, online grocery sales in the UK peaked at 16.1% in January 2021 and continued to take 13.1% of the total UK market share throughout January 2022 (Parr, 2022). Prior to the pandemic, online grocery shopping was considered complementary to in store purchases (Hand et al., 2009), but it is now believed this will eventually become the major channel in the next few years (Davey, 2020; Singh, 2019) with predictions that online grocery could take 30% of the food-at-home market share by 2030 (Simmons et al., 2022). However, most packaging has been designed to be presented on a shelf, not to be shipped directly to the consumer, and not to be presented on a digital screen (Feber, 2022).

This shift from shelf to online suggests a transformation of the packaging industry. Leader brands have already started to adopt their packaging to digital, and this is likely to be followed by copycat brands who mimic the packaging appearance of leader brands. Although previous research investigated copycat packaging from a consumer and brand perspective, these studies focused on the physical packaging on the shelf, not online packaging. Earlier studies explored packaging in connection to online shopping experience by focusing on the relative impact of brand names, prices and related search attributes on consumer choices (Degeratu et al., 2000), packaging design elements' effect on consumers' online buying decisions (Al-Samarraie et al., 2019), and the role of the layout of packaging design elements on consumers' viewing pattern (Rebollar et al., 2015). Although it is suggested that the brand name is the most impactful feature in consumer's online grocery purchase decisions

(Degeratu et al., 2000; Rebollar et al., 2015), other studies show that graphics and product pictures are the highest influential features (Al-Samarraie et al., 2019; Benn et al., 2015).

Other streams of enquiry have focused more centrally on the presentation of a product on screen, with numerous studies reporting that an appealing presentation increases the likelihood of the product being purchased (Park et al., 2005; Then and Delong, 1999). Enhanced product presentation, such as videos, 3D images and interactive images, attract consumers and has a positive impact on their purchase decision (Huang, 2005). In an online shopping context, where there is a lack of physical interaction, visual representations are better substitutes for touch than textual information (Lurie and Mason, 2007; Blanco et al., 2010). However, very little is known about the presentation of visually similar packaging on online grocery websites. Therefore, the purpose of this study was to investigate how leader brands, in the absence of tactility, might attempt to portray their products in a superior way to those of copycat products in an online setting. We argue that we need to understand the differences in online packaging presentation between leader brands and copycat brands in order to develop better design strategies for optimising online packaging.

Methodology

This study employed content analysis of the packaging presentations of copycat brands and leader brands across seven product categories. Content analysis is considered a suitable research method for systematically analysing the content of written, spoken, or pictorial communication (Kassarjian, 1977) and has previously been used in the study of packaging design (Elliott, 2008). In order to compare how leader brands and copycat brands present their packaging online, we developed a coding scheme that we used for data entry purposes. The scheme covered two domains: how packaging was presented (3D images, photography, video, and so forth) and what the presentation represented (ingredients, advertisement, usage scenario, etc.).

We purposively sampled packaging from two online grocery retailers, Ocado and Aldi. Ocado is one of the biggest online grocery retailers in the UK, and Aldi has a large presence in the copycat packaging space. We determined visually similar packaging by scanning these two retailers' websites. We identified 30 packaging examples (15 paired), each pair consisting of one leader brand (from the Ocado website) and one visually similar copycat brand (from the Aldi website). The packaging examples were selected from a range of categories, such as noodles, biscuits, crisps, gin, shampoo, skin care and shower cream, to ensure the sample contained a sufficiently different selection of items. We extracted 93 visual elements that were used to present the products from the Ocado and Aldi websites. Visual elements were coded independently by the authors and thematically analysed to identify significant differences in online packaging presentation between leader brands and copycat brands.

Findings

Our findings indicate that there is a significant difference between the packaging representation of leader brands and copycat brands, despite both having highly similar packaging. While copycat brands employ a 3D image representation of the packaging, leader brands enhance their product presentation through a greater combination of 2D images, 3D images, photography and time-based content (i.e., video). The presentation of leader brand packaging contained greater sensory information and was displayed in a more visually sophisticated way. The focus of copycat brands was to rely on a photographic representation of the actual packaging of the product, whereas leader brands embellished their packaging representations with additional brand communication materials, such as accompanying advertisements and supplementary images of the products in use.

The coded visual elements indicated that the copycat brands only used one frame, while leader brands typically used three to eight frames to present their packaging online. While both copycat brands and leader brands employed a 3D image of their physical packaging, as the first frame of the online packaging presentation, leader brands supplemented this with a photograph of the product itself, such as biscuits or crisps, alongside the image of the packaging. Although food packages generally included photography of the product on the

front of the packaging, the additional photographs of the products in use, helped to evoke consumer senses. This technique of supplementing the primary packaging representation with additional sensory images accounted for 16 per cent of the coded visual elements of leader brands. Outside of the food category, leader brands used supplementary images to emphasise the texture of the product, for example, in shampoos. It seemed that these sensorial approaches to showcasing the product were an attempt to compensate for the lack of physical interaction in an online grocery shopping context.

Leader brands also used supplementary imagery to show the product in a usage scenario, helping consumers to imagine the product being used for a specific occasion, such as a photograph of Pringles products and packaging at a night party, or Hendrick's Gin at a garden party. These supplementary techniques that showcased a usage scenario amounted to 15 per cent of the coded visual elements of leader brands. Usage and preparation scenarios were also visualised as 2D illustrations, such as Pot Noodle's illustrative sequence of how to prepare the product for consumption. Within this usage context, before and after photography were frequently featured to show the transformational effect of the product, further substantiating product claims.

In addition to 2D illustrations and 3D images, video content was used in the representation of online packaging by leader brands. The videos, typically an extract from the brands' commercial advertisement, were employed to provide greater sensory engagement for the product, which was most notable for the cases of Walkers Wotsits, Pot Noodle, and Hendrick's Gin. Thus, leader brands reinforced their brand propositions by displaying advertisements alongside the packaging. We also found that leader brands frequently took the opportunity to graphically display key product information regarding environmental concerns, animal testing, and ingredients, most commonly through 2D illustrations and larger text, with 22 per cent of the coded visual elements of leader brands included this type of product information. The result of these embellished elements of information provided an overall richer, more engaging form of detail to make the product more attractive and engaging to consumers.

Theoretical Implications

While the physical packaging of leader brands and copycat brands is very similar, there is a greater distinction between the two when presented in an online grocery shopping context. Rather than simply showing a photograph of the product packaging, which is how copycats display their products, leader brands offer enhanced product presentation through the use of supplementary illustrations, photography and video. These representations enable leader brands to provide a richer and more engaging experience for consumers. Our findings extend the notion of enhanced product presentation (Huang, 2005; Lurie and Mason, 2007; Blanco, et al., 2010) by highlighting the different devices and presentational techniques leader brands use on digital grocery shopping platforms. These findings also reveal that leader brands do not rely on the brand name and packaging, as previously suggested as the primary importance in online grocery purchase decisions (Degeratu et al., 2000). This study, therefore, contributes to the packaging literature by identifying the differences in the online representation of visually similar packaged products, and how leader brands build upon their brand name recognition by exploiting the opportunities of the digital platform to elevate their brand position.

Practical Implications

The implication of this research is that copycat brands should consider using the digital platform to better showcase their product through more visually interesting, dynamic content. The success of the copycat strategy might not easily translate the visual imitation quite as effectively on the digital platform as it does on the physical shelf because of the emphasis on lower cost. The implication for leader brands is that the increase in visual stimuli and enhanced media content is likely to be imitated by copycat brands. It is unclear however how convincing such imitations may be, as time-based content is more difficult to directly imitate than static packaging and visual identities.

Originality

The initial findings of this research provide insight into the ongoing issue of competition between leader brands and copycat brands. Prior to this study, research focused on the physical nature of packaging and shelf presence. As we increasingly move to online grocery shopping, physical packaging studies become less central to the discussion. Our study provides researchers with indicative insights into this expanding and important domain.

Keywords: Packaging presentation, online packaging, online grocery shopping, copycat packaging

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