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SWP 26/93 CONSUMERS AND GROCERY BRANDS: SEARCHING FOR ATTITUDES - BEHAVIOUR CORRESPONDENCE AT THE CATEGORY LEVEL

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ISBN 1 85905 031 X

BIOGRAPHY



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Simon is a Senior lecturer in marketing at the School of Management, Cranfield Institute of Technology. After graduation, he followed a career in international food marketing with Unilever Plc. He regularly contributes papers to international conferences and publishes in the area of consumer behaviour and branding. He has recently been appointed Director of the Centre for Marketing Relationships at the School.

CONSUMERS AND GROCERY BRANDS:

Searching for Attitude - Behaviour Correspondence at the Category Level

by Dr Simon Knox

ABSTRACT

During 1983 there was a national water strike in the UK. As a result, sales of bottled mineral water leaped by over fifty percent within a year and, each year since then, volume growth has been sustained at well over ten percent. In the last few years, sales of these brands through supermarkets have begun to significantly outweigh the traditional market channels of pubs, restaurants, bistros etc. and a plethora of own-label brands have become well-entrenched in the market. All the evidence suggests that a mass-market has evolved from the niche market established by Perrier in London during the 1980s. According to Leo Burnett Advertising, the Perrier Agency, the brand was originally positioned to appeal to image-conscious trendies and the advertising created to reflect life-style, fashion and success. Mineral water was established as an expressive product; one which lent itself to demonstrations of status amongst the cognoscenti.

Given the way that the market has evolved and radically altered with new competition and new distributive channels, I was interested to find out if consumers still saw the brands in this way. So, the primary research task was to determine the saliency of both normative and behavioural beliefs amongst users, arguing, a priori, that product-derived benefits would now significantly outweigh the influence of social conspicuousness as the main reason for consumption.

Despite its recognised limitations, the Extended Fishbein Model (E.F.M.) was selected to measure both beliefs about drinking mineral water and its social consequences. Once the model had been validated, the data was then disaggregated into four respondent cells based upon consumption criteria. Using principal components analysis, I was then able to look at the degree to which product-performance beliefs and social norms variously influenced each group. Differences in the balance of behavioural influences were detected across heavy, medium and light users. These differences were particularly marked when contrasted with non-users of the product category.

Finally, using median tests the researcher looked for attitude-behaviour consistency across groups. Using evaluations of product-performance beliefs, it was possible to demonstrate an extraordinary degree of correspondence which would seem to signpost that the behavioural characteristics of consumers directly determine the saliency of their attitudes held about mineral water consumption. Further managerial conclusions are drawn out from the research findings, accepting the limitations of small-sample research and the validity of multiple regression analysis.

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European Consumption of Mineral Water

Since the second world war, mineral water markets have been successfully created in Western Europe and the USA. France leads the world in consumption of mineral waters at 72 litres per capita (Table 1) and remains the leading producer:

Table 1: Per Capita Consumption of Mineral Water (litres)

Country	Litres
France	72
Belgium	54
Italy	54
Spain	20
USA	20
Holland	9
UK	2

Some 70% of French people regularly drink the product. However, since the early 1980s domestic sales of both the sparkling and still water have remained static. During this time, exports of both products from France have grown dramatically, spearheaded by the Source Perrier Company, which is the market leader with a product portfolio of some 15 brands including Perrier, Volvic and Buxton[1]. In the USA, Perrier accounts for about 86% of all imported water and is market leader with a 30% share (Financial Times 1988). Source Perrier has also been instrumental in developing the UK market. Since 1972, when Perrier (UK) was formed, the UK market has been dominated by Source Perrier brands.

Mineral Waters in the UK

During the 1970s, Perrier built the market almost single handed, aided by the "Eau so successful" advertising campaign devised by Leo Burnett. By the early 80s, there were five major competitors each contributing to advertising spend and stimulating market growth (Table 2).

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1 Prior to the acquisition of the company by Nestlé in 1992. Currently, some of these brands are being sold off to meet necessary conditions of numbers within the EC

In 1983 there was a major marketing windfall, a national water strike, which caused the market to leap by almost 50% in one year. At the same time, the market began to segment on a price basis, as the premium brands gained national distribution through grocery outlets and own labels were introduced.

Table 2: The UK Mineral Water Market (Million litres)

Year	Litres
1980	25
1982	34
1984	65
1986	105
1987	150
1989	300
1991	430

Source: BDAS/Natural Mineral Water Association

Whilst product life-cycle theory suggests that volume growth will inevitably slow down, Perrier estimate that the average Briton will be drinking twenty litres of bottled water a year by the turn of the century (Super Marketing 1993). Currently, some 60% of UK consumers drink sparkling mineral water either in their own home or out at a pub, restaurant etc. (Super Marketing 1992).

The UK Consumer and Derived-Brand Benefits

Forty-one per cent of UK mineral water is consumed by Londoners. This may be due to the fact that the original "eau" campaign was targeted at "image-conscious trendies" who saw mineral water as a status symbol (Source Perrier 1987). Perrier was associated with life-style, fashion and success. The press and poster campaign was London and Southern-based to complement the distribution channels which were primarily through the on-trade: hotels, bistros, restaurants and pubs. Thus, the intention was to establish mineral water as an expressive product; one which lends itself to demonstrations of status.

As the distribution base broadens (56% of national sale are distributed through major multiples [Mintel 1988]), a mass market has developed from the niche position previously occupied.

There is also considerable evidence to suggest that other environmental and social factors are contributing to structural change. Thompson writes "... there has been an increased awareness of the fact that tap drinking water has been subjected to multiple recycling; concern about chemical additives (to tap water) such as fluoride; worries about the effects of industrial and farming pollution and changes in drinking habits with younger people looking for alternatives to spirits" (Financial Times 1986). Richard Foulsham, Managing Director of the BSN Groupe, has suggested that the drink-drive factor has contributed significantly to the increased sales of mineral water. He concludes that this is due to a psychological shift in consumers' perceptions of soft drinks as acceptable alternatives to alcohol (Marketing Week 1986).

If one accepts the premise that bottled mineral water has now evolved from niche branding to mass market, one also needs to recognise that consumers' attitude towards the brands and their perceived benefits are likely to have shifted with increased product availability. Under these market penetration conditions, the brands are likely to be perceived as having less status value and more instrumentality (i.e. benefits derived from personal satisfactions). Clearly, this typology is unlikely to be mutually exclusive since many brands offer both expressive and instrumental benefits. However, it is my contention that there has been a shift in consumer buying behaviour, attitude and intention which places the product category firmly towards the instrumental end of this continuum.

The purpose of my research was to carry out an exploratory market study to test this hypothesis by constructing and validating a multi-attribute model of the product category. A further research task was to disaggregate the data by user group so that consistencies in attitude-behaviour correspondence could be traced. Should the data reveal directional consistency (viz. heavy user to non-user), then the research could provide timely contributions to the contemporary debate about the extent of consumer information processing surrounding grocery brands of this type (McWilliam 1991).

The Role of Attitudes in Influencing Consumer Behaviour

Traditional marketing research appears to be based on the assumption that an understanding of consumers' attitudes will provide some guidance as to likely behaviour, albeit a knowledge of attitudes will not guarantee a reliable forecast of a specific type of behaviour. Whilst there has been a considerable amount of research into this relationship (e.g. Day and Deutscher 1982), the fact that "attitude" has been defined in over 100 different ways (Fishbein 1967) undermines much of the categorical analysis of the attitude-behaviour relationship. The most widely accepted definition of attitude is that from Allport: "learned predispositions to respond to an object or class of objects in a consistently favourable or unfavourable way".

The framework generally held for understanding attitudes is based upon three components, i.e. cognitive (beliefs about the particular object), affective (feelings or evaluation regarding the attitude object) and conative (behavioural tendencies towards the object). The relationship between differing patterns of these three components is thought to characterise the nature of attitude (Krech and Crutchfield 1962). Consideration of market research procedures shows that attitude measurement techniques tend often to be unidimensional scalings of either beliefs about brands or evaluations of brands (Sampson and Harris 1970). Also, these measures often focus upon consumers' attitudes towards brands, rather than their attitudes towards buying the brand (cf. Levitt's classic observation in 1970 that industrial purchasers buy quarter inch holes, not quarter inch drills).

In developing the Theory of Reasoned Action, a new era of attitude research was introduced by Fishbein and Ajzen (1975, 1980) who stressed the difference between attitude and belief (i.e. the probability of the object having a specific relationship with some other object or value). They viewed attitude as an unidimensional concept based upon the amount of affect for an object and define attitude as a "learned implicit response that mediates evaluative behaviour". They also argued that researchers need to study four variables to better understand consumer behaviour: actual behaviour, behavioural intentions, attitudes and social norms. In the model (the Extended Fishbein Model) they

postulate that overall behaviour can be inferred from behavioural intention which is a function of:-

1. the individual's attitude toward performing the behaviour in a given situation.
2. the norms governing that behaviour in that situation and the person's motivation to comply with these norms.

So, the model takes the form:

$$B \approx BI = W1\ [\text{Attitude to act}] + W2\ [\text{influencing norms}] + E \quad (1)$$

$$\text{Attitude to act (Aact)} = \sum_i b_i e_i \quad (2)$$

$$\text{Influencing norm (SN)} = \sum_j (nb_j)\,(mc_j) \quad (3)$$

Where:

B	=	actual behaviour
BI	=	behavioural intention
b_i	=	salient belief about an outcome of the behaviour
e_i	=	evaluative aspect of the possible outcome (i.e. relative desirability of each outcome)
nb_j	=	normative belief i.e. respondents' belief about what salient referents would advise
mc_j	=	motivation to comply with the wishes of the referent
W1, W2	=	weighting factors (Beta weights)
E	=	residual term

From a marketing perspective, this model is very apposite since it evaluates an individual's attitude towards consuming or purchasing a product rather than their attitude towards the product itself. Whilst someone may have a very positive attitude towards a Porsche, there may be a negative attitude towards purchasing because of price. Further, by including the effects derived from salient referents, the model can offer a broader account of behavioural influences.

The virtue of this model is that it tries to simplify the complex process of consumer behaviour. However, it is not without its weaknesses. The first is the assumed relationship

between behavioural intention and actual behaviour. As the time between measurement of intentions and actual behaviour increases, factors can intervene to change the original intention. Factors that can weaken the assumed relationship include unforeseen situational and environmental events as well as the response to new information. Secondly, if consumers feel a low level of involvement with the product category, they are only likely to have a few weakly-held beliefs in memory on which to base their attitudes and behavioural intentions. There is then the danger that these intentions remain transitory and, as a result, may vary as time elapses. Thirdly, there is the problem that both the attitude and the normative beliefs may relate to the same influencing source which complicates any attempt to identify whether Aact or SN primarily determines the behavioural response. As a consequence, several studies have been critical of the value of the Extended Fishbein Model (see Wilkie 1986 for details). In contrast, others have shown the model to have good predictive validity in both the laboratory (Bonfield 1974, Wilson et al. 1975) and the market place (Ryan and Bonfield 1980, Tuck 1973).

Despite the limitations of the Extended Fishbein Model, it was selected for this research as it can be readily constructed and validated in the context of the proposed hypotheses and measurement criteria.

The Research Hypotheses

Since the purpose of the research was to utilize the E.F.M. to provide a measure of the relationship between consumer behaviour, attitudes and social influences in the mineral water market, it was first necessary to establish the model's predictive validity (H_1) before any such component analysis (H_2 **and** H_3) could be applied with confidence. Thus, our research hypotheses can be summarised:

H_1 **That the EFM is a valid predictor of consumption behaviour in the mineral water market, accounting for more than 60% of the variance in behavioural intentions.**

H_2 **That the perceived benefits derived from consumption stem from personal satisfactions rather than from the effects of social conspicuousness.**

H_3 That the strength of these perceived benefits increases with consumption, i.e. that attitude-behaviour correspondence is observed.

METHODOLOGY

Individual Depth Interviews

In order to elicit behavioural and normative beliefs regarding the drinking of bottled water, 25 in-depth interviews were carried out amongst respondents using a free response format. Eighty per cent of the sample were female and 25 years old or more; sixty per cent were in the C1 C2 socio-economic category. Twenty per cent of interviewees were drawn from non-users aware of the product category. Modal attitudinal and normative beliefs were identified as outlined by Fishbein and Ajzen (1980); in total, there were 12 salient attitudinal beliefs and 7 salient referents derived by data reduction of the twenty five taped interviews. These belief statements are listed below in figure 1.

Figure 1: Attitudinal beliefs and salient referents

Attitudinal beliefs

Drinking bottled water ....

1. Provides a source of water free from impurities
2. Provides a drink free from additives
3. Provides a drink which is alcohol-free
4. Provides a refreshing drink
5. Gives me a drink with no calories
6. Provides a drink which is healthy
7. Provides a non-alcoholic drink when driving
8. Will help me control my weight
9. Offers an alternative taste to soft drinks
10. Tastes the same as drinking tap water
11. Provides a mixer with other drinks
12. Is a waste of money

Normative beliefs

Referent influences include:

13. The family
14. The doctor
15. Close friends
16. Articles in the press
17. Advertisements on TV
18. Media personalities
19. Fellow members of sporting and social groups

Main Survey Sample

One hundred subjects for the main study were drawn from the Anglian TV region at three sampling points. The region was selected for two main reasons:

1. According to the "Which" report on tap water, the region does not meet EEC standards for principle drinking water pollutants.
2. The region now has a higher overall level of bottled water consumption per capita than London or Southern TV areas (Mintel 1988).

It was thought likely that in this area of the country, the sample population would hold beliefs about the consumption of bottled water which reflected both instrumental and socially-derived benefits.

A stratified, quota sampling technique was used to ensure that four user groups (heavy, medium, light and non-users) were included. In the event, the researcher was able to recruit 25 respondents into each of these four cells. The sample was weighted towards women ABs in the 25-44 age group, identified by Mintel Market Intelligence (1988) as being the highest consuming categories. No attempt was made to differentiate between individual brands or water types (still or carbonated).

Measuring Behaviour and Behavioural Intentions (BI)

The Dependent Variable

Behavioural intention was measured amongst users and non-users by asking how often respondents intended to drink bottled water in the next month. Each respondent was then placed into one of ten consumption categories based upon the Mintel classification. These ten behavioural categories were used as a basis for constructing a behavioural intention index, corresponding to the BI component in equation (1). As a cross reference, respondents were also asked how often they drank bottled water at present [B in equation (1)]; there was very little difference between stated current behaviour and intentions over the stated time period. (It would have been more rigorous methodologically to measure behaviour by collecting labels or empty bottles after a one month period but time did not permit in this exploratory study). The questionnaire was administered over two weeks during the summer period so that any seasonal influences on consumption would not vary significantly.

Analysis

The raw data was analysed in two phases. Firstly, regression analysis was carried out and regression correlations (R) and their corrected values (R^2) were computed using Minitab. In addition, summed scores for Aact (equation 2) and SN (equation 3) were also calculated using this software.

Secondly, disaggregate analysis was carried out on the attitudinal data using SPSS so that the characteristics of discrete user groups could be identified and attitude-behaviour correspondence between groups examined.

Results and Discussion

Initially, it was necessary to determine the extent to which the EFM could predict behavioural intention since the validity of subsequent data analysis was dependent upon predictive ability. Table 3 shows the beta weights and multiple regression coefficients obtained for the model specified in equation (1) and also for two additional

incorporating the attitudinal and normative components separately. In the full model, attitudinal and normative components together accounted for 75% of the variation in behavioural intention. In the other two models tested, attitude alone accounted for 72% of the variation in behavioural intention whilst subjective norm alone accounted for 47% of the variation.

Table 3: Regression Analysis Results

REGRESSION MODELS	AVERAGE REGRESSION BETA.Wt.W1	AVERAGE REGRESSION BETA.Wt,W2	AVERAGE MULTIPLE R	CORRECTED AVERAGE R^2
BI = W1Aact+W2SN+E	0.72**	0.17	0.87**	0.75
BI = W1Aact+E	0.85**	-	0.85**	0.72
BI = W2SN+E	-	0.69**	0.69**	0.47

** $p < 0.05$

With regard to the intention to consume mineral water, the EFM was thus shown to have good predictive power (accepting the assumption that multiple regression models can be used for predictive purposes):

H1 is shown to be valid

The relative magnitudes of the beta weights W1 (0.72) and W2 (0.17) in the full regression model (Table 3), suggest that attitudes influence the behavioural intentions about drinking bottled water more strongly than normative influences. This is borne out by the correlations of the two independent variables (Aact and SN) with BI (see second and third models in Table 3). R^2 values of .72 and .47 respectively were obtained for these component contributions when assessed individually. In consumer behaviour research, it seems reasonable to assume that differences in predictive usefulness (as measured by beta weights) for normative vs. attitude beliefs will reflect the degree of social conspicuousness vs. the need for personal satisfaction with product performance (Bourne 1964, Cohen and

Barbar 1970). In this instance, the attitudinal component significantly outranked the normative component from which one can infer that these brands are now drunk primarily for "instrumental" rather than "expressive" reasons. Whilst the researcher has no empirical evidence to suggest that the reverse was true during the early 1980s, the historical development of the advertising and distribution strategy suggests that this was the underlying assumption of the manufacturers.

H2 is shown to be valid

Differentiating between user groups

To assess whether the different groups of respondents (i.e. non-users, light, medium and heavy users) considered the same basic dimensions to formulate their behavioural intentions, a principal components analysis of the beliefs and social norms that influence their consumption was undertaken. This technique is a powerful data reduction device and has also been used in several research projects to determine the key attributes of different consumer groups (see Churchill 1983 for details). For each of these four respondent groups, attention was focused on the matrices of the 25 cases x 19 variables (i.e. the 12 elements of the beliefs about drinking mineral water and the 7 social norms). Correlations between these 19 variables were calculated and, using the SPSS suite of programs, these four correlation matrices were subjected to principal components analysis.

Examination of the non-rotated component loadings did not provide a particularly illuminating picture, so a Varimax rotation was applied to those components with eigenvalues greater than one, (between 6 and 9 components depending on the respondent group). For each of the four respondent groups, it was found that the first five components explained approximately 60% of the variance. To interpret the meaning of these components, only those variables that had the highest loadings on each of the rotated components were considered. Table 4 summarises these high-loading variables for each of the four user groups.

A visual inspection of the variables shows that there are similarities across the three user groups (e.g. the alcohol-free, additive-free nature of the brands) which clearly distinguish users from non-users since the latter group do not recognise these benefits. Indeed, non-users appear to hold only weak or negative beliefs about mineral water brands in general. What is really interesting, though, is that non-users appear to be strongly influenced by social norms whilst heavy users, with a wide repertoire of product-derived beliefs, show much less reliance upon these influences. For instance, the behavioural intentions of non-users are strongly influenced by the press, close friends, media personalities and TV ads; product-derived beliefs are very limited. By contrast, heavy users hold broad-ranging beliefs about these brands which include value for money, healthy, impurity- and alcohol-free. Their normative influences appear more removed and limited to social groups, the press and media personalities.

Table 4: Sources of Influences across User Groups

	MINERAL WATER USER STATUS			
Component	**Non-users**	**Light**	**Medium**	**Heavy**
1	Influenced by press.	Refreshing and alcohol-free. Influenced by press.	Additive- and alcohol-free.	Influenced by social groups. Impurity-free.
2	Influenced by friends and media personalities.	Influenced by TV advert and doctor	A healthy drink and an alternative to soft drinks. Influential social group.	Alcohol-free. Influenced by press.
3	Helps control weight.	Influential media personalities. Additive-free.	Influential family. Refreshing and helps control weight.	Influenced by media personalities. Healthy drink.
4	Influenced by TV advertisements.	Tap-water taste.	Influenced by TV advertisements.	Tap-water taste.
5	Waste of money but is an alternative to soft drinks.	An alternative to soft drinks and helps control weight.	Influenced by media personalities and close friends.	Alternative soft drink.

Finally, Median tests were carried out for each of the twelve attitudinal beliefs so that average scores amongst each of the four user groups could be determined and consistencies (or differences) between groups investigated. What was particularly striking about the between-group responses was the level of attitude-behaviour correspondence. For example, eight of the twelve belief statements about brand benefits yielded median scores that were significantly different across each group ($p < 0.001$); the saliency of attitudinal beliefs increase with consumption. Accepting that attitudes are developed from these evaluative beliefs, I have therefore concluded that consumer attitudes towards consuming relatively low-involvement brands of this type are strengthened by usage.

H_3 is shown to be valid.

Managerial implications

Recognising the limitations of small sample research, the results indicate that the non-user and the heavy user of mineral water may be differentiated, with the former being more concerned about their perceptions of influencing social norms rather than their constellation of beliefs. These results would benefit from further testing amongst a larger sample and, if replicated, they could help develop marketing strategies. For example, by using qualitative research amongst non-users, the influence of social norms could be explored and the marketing offering suitable altered (e.g. PR and sales promotions strategies). Likewise, research could be undertaken amongst heavy users to assess whether their beliefs about individual brands of mineral waters reflected the manufacturer's selling proposition and a revised communications strategy suitably developed.

Conclusions

The present research was undertaken to test the efficacy of multi-attribute modelling in predicting consumer behaviour and to study attitude-behaviour correspondence in the mineral water market. It was argued from the extant marketing literature that the Extended Fishbein Model would be appropriate for this exploratory research. Under the conditions

which behavioural intentions and behaviour have been judged by the respondents, the researcher has shown the model to have good predictive power. With the model measuring both attitudes towards a given behaviour and the social influences, it has been possible to discount the notion that the current market growth is based upon the "designer water" concept since the evidence suggests that instrumental benefits are now more important than status-derived values.

Principal components analysis indicated, however, that non-users were more concerned about influential norms while heavy users had a constellation of beliefs about mineral waters. For the heavier user, consumption appears based upon a risk reduction process (drinking mineral water due to concerns about tap water pollution). Non-users do not seem to value the benefits of mineral water and, while apparently aware of media activity, are insufficiently predisposed to modify their behaviour.

This disaggregated data also provided convincing evidence to suggest that attitude-behavioural consistency varied according to frequency of usage which lends further weight to the notion that consumers adopt a behaviouristic approach to information processing and the formation of stable attitudes towards these types of brands (see Krugman 1965, 1967 and Foxall 1990).

Whilst the researcher recognised that it was never the intention to measure individual brand benefits (or derived benefits to be more precise), the salient beliefs do appear to be highly generic to the market. The growth in own-label products and their use of supplier brand names bears witness to this generic market idea. However, the forecasts seem to be suggesting that market growth will continue in the short term and that household penetration should also increase as uncertainty about tap water purity continues to be reported in the media. Source Perrier, as the market maker and leader, continues to provide an awareness function through its media advertising. Spadel, on the other hand, has recognised the importance of associating its Spa brand with body purity and health; for the last few years the company has had a black and white campaign in the quality press to reinforce this positioning. It remains to be seen how effective Perrier are in arresting the

advances of brands that successfully communicate product-derived benefits now that a mass market has evolved and "designer water" is a thing of the past.

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