



RESEARCH

CONSUMERS' BELIEFS ABOUT BRANDS ARE FICKLE

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THE beliefs and attitudes that customers hold about your brand are unstable.

In one survey, some customers may say your brand offers "good customer service", yet the next time around half of them will give a different response.

But you and your market researchers will probably never notice this because overall brand image scores will remain unchanged.

The phenomenon

It is a little-known fact that individuals very often give different responses to the same questions on different surveys, and that they do this in a predictable manner.

Each month Acme Pty Ltd's market research company surveys the market and reports that about 60% of customers state that the Acme brand "is a reliable product". Acme's researchers and management conclude there is a group—a bit over half—who think Acme is reliable and another group who think other brands are reliable.

But Acme's management is wrong, it turns out that most of the market think Acme is "reliable" but they only think this about 60% of the time.

It is common practice in market research to collect perceptual and attitudinal data and, in particular, brand image data.

This has been an important concept in market research for more than 40 years.

Commonly asked questions include "Do people like our brand?", "Do they associate us with good service?", "Do they think we are trustworthy?", and "Do our flavours taste nice?".

Such measures are typically seen to be important because a consumer's situation may change, but attitudes are relatively enduring.

Market researchers conduct image surveys to show how competing brands score against our brand on chosen attributes

From this, managers hope to develop a good positioning strategy, or to expose relevant attributes that can be used in marketing communication efforts.

With this in mind, attitudes and brand beliefs are commonly assumed to predict consumers' future behaviour.

Managers often base segmentation and targeting decisions on such customer data.

However, research using attitudes to predict future behaviour has shown very poor results. Averages across studies show attitudes typically explain less than 10% of variation in later behaviour (Wright and Klÿn, 1998).

One of the possible reasons for this poor correlation is the recent discovery of the fickleness of consumers' responses.

This instability was first described comprehensively by researchers working on the R&D Initiative for marketing (www.MarketingScience.info), after looking at the stability of individual brand image responses for more than 100 brands in the US and UK, for both branded products and services.

Individuals' responses turned out to be highly variable over time.

On average, only about half of the people interviewed ever gave the same answer to the same question across two interviews.

The instability is inherent, even if people are interviewed only 15 minutes later.

This is in spite of the fact that the results, at an aggregate level, contrasted with the individual ones, as they remained pretty much steady across the various markets.

If 52% of respondents associated the brand COMFORT with "nourishing", then in a second survey again COMFORT would score 52%, leading most people to suppose that the same 52% of people were consistently rating the brand as "nourishing", and 48% were rating it "not nourishing".

But about half the people that made the association in the first survey, did not in the second, while some who did not make the association in the first place later did so in the second.

Further work indicates there are no "hardcore" stable or fickle respondents (Dall'Olmo Riley et al., 1997, Sharp and Romaniuk, 2000).

The predisposition to change response appears common across all respondents.

This important finding has yet to be reconciled with the brand-image literature that assumes stability of the attitudes and beliefs over some time, and that any change in brand image will impact on customer behaviour.

Changeable respondents

There are several possible explanations for this fickleness which are currently being investigated. It may well be that brand beliefs are driven by behaviour.

Given that in most purchasing, customers are not 100% brand loyal but shop from a portfolio of brands, then between surveys it would be quite easy for a customer to buy or use another brand and hence change their beliefs.

But this doesn't explain why the instability occurs, even when the surveys are conducted 15 minutes apart.

So, alternatively, it could be that perceptual variability is driven by an underlying stochastic (chance-like) pattern of response that affects the probability of any response being given.

The average respondent just has a 52% probability of saying COMFORT is "nourishing".

Just as behaviour is probabilistic—I have a 40% chance of buying Coke on any soft-drink purchase (I buy Coke 40% of the time)—brand beliefs are also probabilistic (I have x% chance of saying Coke "tastes good" on any brand-image survey).

What this means

First, we have to give up our views of customers holding deeply-held beliefs and attitudes about brands.

It is hard to imagine someone holding deep beliefs that they sometimes express about one brand and then sometimes about another.

Second, we can't use someone's response on one survey to place them into a segment (for example, psychographic or attitude-based segments).

Many market researchers segment on respondents' attitudes, values or beliefs and then profile the segments in terms of behaviour—such as media habits or buying frequency—and demographics.

The findings here suggest this is rather pointless. The attitudes and, hence, composition of the groups, is changing with each survey.

A much more sensible and stable approach would be to segment using other more-stable behavioural variables, such as usage rate or repeat-purchase as the dependent (or membership) variable.

This way, while attitudes may change, the segments will remain relatively stable.

Third, we can't use the attitude a customer expressed on one survey to predict how they are going to behave in the future.

If we say that all those who say "John Howard is a good Prime Minister" will vote for him, we will be misled because if we asked these people a second time only half of them would give the same response.

References

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