Patterns of Attitudes and Behavior in Fragmented Markets

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Abstract

The strong correlation between consumer attitudes towards brands and the brands' market shares or usage levels is well known. This attitudinal evidence, however, mainly relates to sectors where there are large, well established brands. This raises the question of what happens in fragmented markets where there is a proliferation of small, mostly not very well known brands. This paper investigates possible sub-patterns in a fragmented market such as wine. Neither the peculiarities of fragmented markets nor the type of measures employed seem to affect the occurrence of the known patterns. The interpretation of the findings and the managerial implications are discussed. Specifically, we suggest that knowledge of these patterns can be useful to managers for the interpretation of attitudinal statements concerning their brands compared with the competition. The results also imply that strategies aimed at raising attitudinal scores may be pointless, unless trial and usage are increased first.

1. Introduction

There is extensive evidence that attitudinal responses to a brand generally relate to the use of the brand (e.g. Bird et al. 1970, Barwise & Ehrenberg 1985, Castleberry & Ehrenberg 1990, Dall'Olmo Riley 1995). The likely interpretation is that the level of such attitudinal measures is mostly determined by and predictable from the size of the brand (in terms of its market share or usage), rather than by any more specific properties of the brand itself. This corresponds to the pattern found in buyer behavior, where a

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larger ratio between the frequency of buying the brand and the frequency of purchasing the category occurs because of the large size of the brand, rather than because of anything specific about the brand itself (Goddard 1978). An additional known factor is a "Double Jeopardy" effect, whereby even among regular buyers of each brand, fewer give a favorable response for a small than for a large brand (Castleberry & Ehrenberg 1990, Ehrenberg et al. 1990).

This attitudinal evidence, however, mainly relates to highly branded and advertised sectors such as breakfast cereals and laundry detergents, where there are a number of large and well known brands, as well as many smaller brands. Furthermore, many brands in these sectors receive substantial above-the-line advertising support, which may be a contributing factor to the correlation between usage and attitudes. There is some evidence that, for instance, more current than past users of a brand remember seeing it advertised (Brown et al. 1992, Dall'Olmo Riley 1995), although the effect is not large. A plausible interpretation is that advertising has a supportive and reinforcing role, keeping the brand salient for its users (see Barnard & Ehrenberg 1997, Ehrenberg et al. 1997).

This raises the question of what happens in those sectors where there are no large brands, but there is a proliferation of small, mostly not very well known brands with minimal advertising support. One such market is wine, where no single brand in the UK has a market share greater than 2% (Mintel 1999) and where main media (or above-the-line) advertising expenditure is traditionally low, not usually more than 0.2% of sales value (Mintel 1999). Furthermore, most advertising expenditure in the UK market has tended to come from marketing bodies, promoting the wines of different countries or regions, rather than specific brands. Brand advertising in the UK market (which is the focus of this study) has historically been undertaken mainly at the two opposite ends of the spectrum, i.e. either by Champagne houses or by volume-based, low-priced brands. Some commentators actually believe mass advertising to be counterproductive for wine brands, making them appear less exclusive (Rachman 1999). However, wine in the UK market has been receiving a lot of indirect support from retailers, with intense

promotional activity at the point-of-sale in the form of in-store displays and tasting events. Nonetheless, these activities are spread over the myriad of existing brands, hence may amount to very little for each individual brand.

An additional characteristic of the wine market is that 'social image' pressures may influence consumers' attitudes, since wine is generally consumed in the company of others (white wine in particular tends to be associated with drinking in pubs and at parties - Mintel 1999). Indeed, Quester et al. (1996) remark that wine has been used in previous studies with an emphasis on product involvement, as it is able to satisfy the criterion of having both high and low involvement consumers. This is in contrast with previous attitudinal studies by Ehrenberg and colleagues which focused on markets where purchase involvement is generally low. Where purchase involvement is low, consumers' brand choices may be driven mainly by habit. As a consequence, brand attitudes may not be very strongly held and may be a post-hoc rationalization of one's behavior (e.g. Bem 1967). In contrast, where consumers' involvement is high (e.g. for the heavier, more enthusiastic wine drinkers), pre-formed attitudes about different brands may be strongly held.

The main aim of this paper is to apply previous knowledge concerning the relationship between usage and attitudes to a context where the peculiarities of the market structure may make a difference in the extent to which mentioning a belief towards a brand is related to its past usage. The large number of very small brands with no clear leader in "popularity" also raises some questions regarding the occurrence of the Double Jeopardy phenomenon (see Section 2).

In addition, and in contrast to most previous studies which employed free-choice attribute-by-attribute type of questions, a forced-choice Likert scale measuring the strength of the attitude was used for this study. This was done to satisfy a further aim, namely to replicate and generalize the findings by Barnard & Ehrenberg (1990) who had directly compared free-choice and forced-choice techniques of attitude measurement. We also wanted to check on possible sub-patterns related to the attitude strength and the

degree of purchase involvement. For example, whether the known correlation between attitudes and usage occurred only beyond a given attitude strength, which could have been associated with higher consumer involvement. The type of questioning used in this study is also relevant to testing the occurrence of the Double Jeopardy phenomenon, as we discuss in the next section.

The contribution of this paper is therefore to expand on the scope of the existing research about the relationship between consumer attitudes and purchase behavior, in terms of the measures employed, the variables examined, and the product fields surveyed. This will help us to better understand such patterns. Furthermore, replication and generalization studies of this kind do help establish a consistent body of knowledge that can be drawn upon for modeling and normative purposes.

In this perspective, the key finding of this research was that the known patterns did generalise to the UK wine market (in spite of its differences) and to the forced-choice measurement technique.

In the next section we review past evidence on the relationship between attitudinal responses and brand usage. After describing our methodology for this study (Section 3), we report on our results concerning the wine market in Section 4. We draw conclusions and we discuss the implications of our findings in Section 5.

2. Previous Knowledge of Usage/Attitude Relationship

2.1. The Attitude - Behavior Relationship

Marketing researchers have approached the study of the attitude - behavior relationship by borrowing heavily from theories developed within other disciplines, and especially from those which have evolved within a social psychology framework. These mostly postulate a complex evaluation process, leading to attitude formation and to subsequent behavior. The development of Multi-Attribute Attitude Models has been pivotal to the

development of this stream of research (e.g. Rosenberg 1956, Fishbein 1963, Wilkie & Pessemier 1973, Ajzen & Fishbein 1977).

However, while the study of attitudes in psychology has usually dealt with rather involving issues (e.g. donating blood, or smoking), marketing researchers have often analyzed attitudes in the context of much less involving activities, such as routine brand choice. The complex choice processes borrowed from psychology have often revealed themselves to be inadequate in explaining the relationship between consumers' attitudes and their *brand* purchase behavior, although they have found some application to choices concerning *product* categories (East 1997).

For routine brand choice, consumers appear to rely upon habit and past experience, rather than on the collection and evaluation of all available information, in order to reduce their "cost of thinking" (Ehrenberg 1974, Olshavsky & Granbois 1979, Rothschild & Gaidis 1981). And even for so-called high-involvement purchases, consumers appear to make use of their existing value systems and often display quite limited information search (Wasson 1979, Olshavsky & Granbois 1979, Markin 1979).

Furthermore, extensive empirical evidence in the context of brand choice has supported the correlation between attitudes and behavior in terms of mutual reinforcement and consistency (Attitudes $\Leftrightarrow$ Behavior), rather than causality (Attitudes $\Rightarrow$ Behavior). This stream of research is reviewed in the next Section.

2.2. Variations in Attitudinal Responses with Brand Usage

As already mentioned, the strong correlation between current and past usage of a brand and consumers attitudes towards it is well documented. (An exception occurs when an attribute reflects a strong functional differentiation for a particular brand, as will be discussed below). Lower positive attitudinal responses (e.g. "washes white") for brand B than for brand A are mainly due to the fact that B has a lower market share and fewer frequent buyers and users. This has been found for many different low-involvement,

highly branded product categories over the past thirty years, both in the UK and the US (e.g. Bird & Ehrenberg 1966, Bird et al. 1970, Barwise & Ehrenberg 1985, Castleberry & Ehrenberg 1990, Dall'Olmo Riley 1995).

As extensively documented in the references, the explanation is that very frequent or recent buyers or "users" of a brand nearly all say that the brand "tastes nice", or that more generally they "intend to buy it". In contrast, fewer of the less frequent or less recent users of the brand give such positive attitudinal endorsement, fewer still do so among infrequent users, let alone among those who claim never or virtually never to have used the brand. Since a small brand B has relatively fewer frequent users compared with a big brand A, fewer people overall tend to give B a positive attribute response. But this is not because the users of brand B feel differently about B than users of A feel about A, but rather because B has fewer users (i.e. a market share effect).

Attribute beliefs which vary in this way with brand usage are called "evaluative", because they reflect that users of a brand value the brand on each of the main features expected from the product category as a whole (e.g. "tastes nice" for Breakfast Cereals or "washes white" for Laundry Detergents).

The question here is whether such patterns replicate in a product category (wine) where not only there are no large brands with a high number of current and past users, but also where "social image", usage occasion and involvement may dilute the structural market share effect just described.

2.2.1. "Descriptive" Attributes

In contrast with the above, attribute beliefs which reflect a strong functional characteristic or heavily promoted property of a specific brand and hence appear "descriptive" (e.g. "Washes well in cold water" for the Laundry Detergent Cold Power) were found *not* to be related to how many users the brand has. Indeed, "descriptive" attribute belief mentions differ little between a brand's users and its non-users. This is

because not only the users but also quite a lot of the infrequent users and non-users of the brand will be aware of an obvious or heavily promoted characteristic (e.g. that Cold Power allegedly "Washes well in cold water"). In this respect, "descriptive" attributes do not reflect an 'attitude' towards the brand.

A more detailed discussion of the difference between "descriptive" and "evaluative" attributes and their characterization can be found in Dall'Olmo Riley et al. (1997).

2.2.2. Double Jeopardy

A further known pattern in this kind of attitude - behavior relationship is that there is some variation in attitudinal response levels even *among* the "users" of each brand - however usership may have been defined (Castleberry & Ehrenberg 1990, Dall'Olmo Riley 1995). This is again a market share variation, rather than being specific to the particular brands: the fewer the number of brand users (i.e. for the smaller brand B), the fewer of these fewer users also mention an "evaluative" attribute belief. This is a classic instance of Double Jeopardy (e.g. McPhee 1963, Ehrenberg et al. 1990).

The theoretical explanation of Double Jeopardy (due to McPhee 1963) is as a statistical selection effect that *has* to happen every time two or more items (for example brands) only differ in their popularity (or their "*sizes*"), but are otherwise of "equal merit". In practice, the "equal merit" assumption is less restrictive than it might sound, and refers to the condition that an alternative must be compared with an appropriate "par".

McPhee's typical example to illustrate the phenomenon of Double Jeopardy is of two restaurants (the only two in town) which hardly differ in anything else but their popularity: one is known by many more people than the other. The people who know the less popular restaurant almost certainly will know also the well known one, since almost everybody does: when asked to indicate which restaurant they prefer some will say the lesser known, but many will say the popular one (since it is the most popular!). However,

the less-informed people, who know only of the well-known restaurant, can name only that one.

Similarly, in unpartitioned product categories, the few users of a small brand B are likely to be users also of a large brand A, which has many users overall. Thus, especially in free-choice questioning (e.g "Which of these brands 'tastes nice'?"), the users of the small brand B will have the opportunity to say 'tastes nice' for either brand, and may "split their vote" between the two. On the other hand, the users of the large brand A may not know, let alone have ever used, smaller brands such as B, since few people do so anyway. When asked to indicate "Which of these brands 'tastes nice'?", they will only have A (or little else) to choose from. Hence the statistical selection and the Double Jeopardy for the smaller brand: few users, and fewer of whom say they like it, compared with the many users of a large brand, many of whom say they do.

As we have just remarked, the statistical selection procedure at the basis of the Double Jeopardy phenomenon is intensified by free-choice questioning, because of inherent under reporting for the smaller brands in this type of work. This was noted by Barnard & Ehrenberg (1990) in their comparison of free-choice and forced-choice techniques. They found that with forced-choice questioning the Double Jeopardy phenomenon was still noticeable, but was much less strong. The reason was that by forcing respondents to give an answer to both large and small brands, no under-reporting could occur. We test this finding here, whilst also testing the applicability of the Double Jeopardy pattern to a sector lacking obvious 'popular' versus 'unpopular' brands.

3. Method of Analysis

Procedure

A sample of 110 consumers were interviewed in the London area by means of a personally administered questionnaire about their usage and attitudes concerning wine. The sample selected was kept approximately within the proportions of the demographic

profile of wine drinkers given by The 1998 Drink Pocket Book. However, as later discussed, the proportion of medium and heavy wine drinkers may have been over-represented, accounting for 85% of our sample, versus the combined total of 74% reported by Mintel (1999). In particular, the proportion of respondents claiming to buy wine once a fortnight or more often was substantial, at 68% of the sample. This was used as a proxy for the degree of involvement of respondents, which was considered high.

After a filter question to ascertain whether the respondent was indeed a wine drinker, respondents were asked a wide range of questions regarding their buying habits, intentions to buy and attribute beliefs concerning each of six brands of wine. The questionnaire was modeled on a format frequently used by market researchers.

Wine Brands Selection

As remarked by Mintel (1999), brands in the wine market are difficult to define. A wine "brand" may equally refer to a particular vintage, or to a ch✇teau, or to a name applied to a very wide range of different wines, red or white, sourced from many different countries. As a consequence, the name of the variety of grape, or the country or region of origin may fulfill the role of a "brand" for many consumers, giving an indication of the characteristics and quality to be expected. Furthermore, as already noted in the Introduction, the UK wine market is very fragmented, with no single brand having a market share of more than 2%. Apart from some celebrated and usually expensive wines that are available in most countries in the world, there is no popular, consistent wine that can be found on supermarket shelves around the world (Rachman 1999).

Nonetheless, in pilot testing, it was possible to identify some names of wine producers which most people were familiar with and would recognize as "brands". On these grounds, six brands were selected for the study: E&J Gallo, Jacob's Creek, Stowells of Chelsea, Le Piat d'Or and Hardy's. These are given as the top 5 wine brands in the 1998 Drink Pocket Book, but their combined market share is only 6.9%. Their volume

sales are very similar, and the actual leadership may vary from month to month (Mintel 1999). The sixth brand, namely Blue Nun, was added to these five as it has a significantly different price and image, and is also a well-known brand in the UK. The brands tested were therefore all 'large' (relatively to the high degree of fragmentation in the market), as also shown by the 'penetrations' figures among the sample reported in the Results section. This was inevitable, given the necessity to identify recognizable brands and avoid small sample biases. The underlying fragmentation of the wine market and its potential consequences on the known usage and attitudinal patterns however still remain. Thus the replication with extension nature of the study is unaffected.

Measures

The format of all questions was forced-choice. The two main measures we report in this paper[2] are:

(i) consumers' claimed frequency of purchasing each brand in the past (referred as 'brand usage')

(ii) their beliefs about seven attributes of each brand.

Brand Usage

For the buying frequency of each brand, respondents were asked to choose one out of seven possible frequencies ranging from "Once a week or more often" to "Less than once or twice a year" and "Never" (plus Don't know). Given the relatively small size of the sample and in order to avoid biases especially for the lesser brands, the respondents were collated into two main usage groups for tabulation and analysis purposes: i) the individuals who claimed to drink a brand once a month or more often were grouped as **'Users'** of that brand; ii) those who claimed to drink a brand 'less than once or twice a year' or 'never' were considered to be **'Non-users'**. This classification is consistent with previous studies (e.g. Barwise and Ehrenberg 1985; Castleberry and Ehrenberg

[2] For the analysis of the other measures, see Rink (1998).

1990) that we are seeking to generalize and also reflects the composition of the sample in terms of the buying frequency of the category.

Attribute Beliefs

Selecting attitudinal beliefs is often done by means of focus groups or in-depth interviews to discover general ideas about the attributes that are valued by consumers. For this study, and in order to get both descriptive and evaluative attributes for the questionnaire, a variety of sources were used. These included past attitudinal studies completed by Spawton (1991), Morgan & Sarris (1992) and Mintel (1997). Additionally, various wine experts and suppliers were consulted.

This led to the selection of seven attributes: 'Popular Nowadays'; 'Good Value for Money'; 'Attractive Bottle Design'; 'High Quality'; 'Refreshing Drink'; 'Good Flavor'; 'The Region the Brand Comes From is Important to Me'. Of these, it was expected that the attributes concerning the bottle design and the region of origin would behave descriptively. This is due to the fact that the wine does not need to be drunk for the respondent to have an attitude towards these factors. Furthermore, Mintel (1997 and 1999) remark that Australian and Californian wines have become increasingly popular. As the leading Californian and Australian brand respectively, E&J Gallo and Jacob's Creek may have shown some deviations. Negative attributes were not included, since past research (Barwise 1985) indicated that the responses for these attributes tend to be lower and are therefore not very helpful discriminative attributes.

Attitudinal Belief Strength

We also wanted to measure the "strength" of the attitude held by consumers. Consumers' beliefs for each brand were therefore measured by means of a five point Likert scale, ranging from "Strongly Agree" or "Agree" to "Disagree" or "Strongly Disagree", with a "Neither Agree or Disagree" option in the middle. The order of the brands was alternated to avoid any response bias.

In this paper we were concerned with variations in attitudinal belief strength amongst brands and between attribute beliefs. The conceptual questions were: (i) whether the known association between brand usage and attitudinal beliefs would generalize to a sector characterized by low branding and media advertising activity; and (ii) whether the pattern would be stronger for more strongly held beliefs. We also wanted to test the applicability of the Double Jeopardy pattern to a sector lacking obvious 'popular' versus 'unpopular' brands and the effect of forced-choice questions on the manifestation of DJ itself. The results are detailed in the next Section.

4. Results

In this Section we analyze the relationship between attribute beliefs and claimed usage behavior for each brand. In Section 4.1. we discuss the general relationship between attitudes and usage. The issue of the strength of the attribute is also mentioned. Section 4.2. goes on to examine evaluative and descriptive attributes. Finally, in Section 4.3. the Double Jeopardy phenomenon is discussed in the light of this research.

4.1. Current Brand Usage and Attribute Beliefs

Table 1 shows the results concerning the relationship between claimed brand usage and the strength of attribute beliefs. The brands in Table 1 have been ordered by claimed 'usage' i.e. relative size. The column headed "Users" reports the percentages of respondents claiming to drink each brand once a month or more often. The percentage

of respondents who either "agree" or "strongly agree" with each attribute statement for each brand is also shown in Table 1.

Table 1
Percentage of Respondents who 'Agree' or 'Strongly Agree' with the Attribute Statements for Each Brand

Brands by Usage	'Users'	Popular nowadays	Value for money	Good Flavor	Refreshing	High quality	Region of origin is important	Attractive bottle	Average Belief
	%	%	%	%	%	%	%	%	**%**
Jacob's Creek	56	83	76	81	76	73	42	73	**73**
E&J Gallo	46	59	59	68	67	53	21	61	**56**
Hardy' s	25	41	36	42	36	43	34	41	**39**
Le Piat d'Or	11	19	21	23	19	18	14	64	**26**
Stowells of Chelsea	5	23	28	23	16	21	10	21	**20**
Blue Nun	4	21	18	6	6	7	7	31	**14**
Average	25	41	40	41	37	36	21	49	**38**
Correlations with usage		**.98**	**.97**	**.98**	**.99**	**.97**	**.82**	**.76**	**.92**

NOTE: the r in the last column is the average of the correlations for individual attributes

4.1.1. Current Brand Usage

The first noticeable feature of the results presented above is that the percentages of claimed "users" of each brand in the first column of Table 1 are much larger than the respective market shares and show wide size variations among the brands. For example, as many as 56% of respondents claim to drink Jacob's Creek once a month or more often, whereas, as mentioned earlier, no single wine brand accounts for more than 2% of the UK market (by volume - Mintel 1999).

The discrepancy between the claimed usage among our sample and the market share of each brand should not be in itself surprising. Claimed usage is one of the many possible measures of the 'penetration' of each brand among the sample. 'Penetrations' and market shares are two related, but *distinct* measures of the relative size of the brands. Both 'penetrations' and market shares rank brands in the same relative order (e.g. the two brands with the highest market shares - Jacob's Creek and Gallo - versus the other four alternatives). However, while market shares are based on the proportion of total sales accounted by each brand, our self-reported 'penetration' measure reflects the relative awareness and usage of the different brands among the respondents.

The fragmentation of the wine market in terms of the brands' market shares and the relatively high claimed usage of each of the brands are not in contradiction. In any variety-choice category, where consumers purchase a portfolio of brands and the average purchase frequency is high, 'penetrations' (however defined) will be considerably larger than market shares. As already mentioned, a substantial percentage of our sample were heavy and medium wine buyers. According to Mintel (1999) medium and heavy buyers account for over 95% of wine consumed, are likely to be the more involved wine users, and hence the "more confident" and willing to experiment with different wines on a regular basis. The high degree of switching among a large number of wines and the large portfolio sizes characteristic of the wine sector explain the fragmentation of the market and the low market shares of individual brands. It also helps to explain the relatively high 'penetrations', or exposure to a large number of brands, over a month period.

4.1.2. The Relationship between Current Brand Usage and Attribute Beliefs

The main pattern in Table 1 is that the higher the claimed usage of the brand, the larger the proportion of respondents who either "strongly agree" or "agree" with each attribute statement. For instance, whilst 73% of respondents "strongly agree" or "agree" with the average attribute belief for Jacob's Creek, only 14% do so for Blue Nun.

The pattern is reflected by the correlations between each attitude statement and the claimed usage of the brands reported in the bottom row of Table 1 above. The correlations between attitudes and usage are all very high, at .76 or above. The results in Tables 1 do therefore confirm the previously known pattern of a strong correlation between *positive* attribute beliefs and brand usage, with higher "strongly agree" and "agree" responses to the attitudinal statements for the more heavily bought brands. This is in spite of the peculiarities of the wine market noted at the beginning of the paper and of the forced-choice questioning employed in the questionnaire. Different usage splits do not affect the general pattern of results, apart from small sample biases especially for the lesser brands.

4.1.3. Attitude Strength

We also checked whether the strength of the attitude affected the general results just discussed. The reasoning behind this was that the patterns may be stronger and possibly even show up only beyond a certain level of agreement, i.e. for the more "committed" and strongest "supporters" of each brand. This would have been manifested, for example, by higher correlation between the "strongly agree" responses and usage, than between the "agree" statements and usage. However, as documented in Appendix A (see Tables A1 and A2), this was not supported by the data. The correlations between usage and the "strongly agree" and "agree" responses not only were remarkably similar - showing no attitude strength effect -, but when they did differ, they tended to be higher for the "agree" than for the "strongly agree" statements (see Table A2 - Appendix A)[3].

Additionally, even for the largest brands, the proportion of respondents "strongly agreeing" with the attribute beliefs were considerably lower than the percentages "agreeing" (see Table A1 - Appendix A). This may have been an "end-of-scale effect", causing respondents to avoid the selection of extreme points on the scale (Oppenheim 1992) (indeed, a similar "end of scale effect" occurred for the "strongly disagree" responses). Such results did not justify discussing the issue of attitude strength in more detail. Hence the decision to aggregate the "strongly agree" and "agree" responses as done in Table 1 above.

4.2. "Evaluative" versus "descriptive" attributes

As mentioned in Section 2, attribute beliefs which vary with brand usage are called "evaluative" because they reflect that users of a brand say, in effect, that they value the brand they use on each of the criteria. Most attributes are of this kind (i.e. attitudinal) and do not therefore reflect any idiosyncratic differences among brands, but merely reflect that *users* of each brand generally endorse it on any of the attributes. The

correlations between brand usage and response levels for individual "evaluative" attributes are usually found to be above .8 (Barwise & Ehrenberg 1985, Castleberry & Ehrenberg 1990, Dall'Olmo Riley 1995).

This appears to be the case for all attributes in Table 1, in spite of occasional blips up or down for individual brands, such as the relatively high score of Stowells of Chelsea for the attribute "value for money" compared with the more used brand Le Piat d'Or. Therefore, while "evaluative" attributes generally reflect the usage and presumably the liking of each brand, they still capture such idiosyncratic differences among brands for some attributes, such as Stowells of Chelsea's characteristic box packaging, leading to a "cheaper" image (see also the comparatively low score for the same brand on the attribute "attractive bottle"). However, for the average attribute in Table 1 there is no blip for Stowells of Chelsea. Individual differences should therefore not be interpreted in isolation, but with reference to the general patterns in the data.

All the attributes in Table 1 have high correlations with usage levels (r = .92 on average). This is so even for the attributes "region of origin is important" and "attractive bottle" which had been predicted to be "descriptive" of idiosyncratic differences among brands or sub-groups, and therefore were expected not to correlate with usage. In spite of several blips up and down for individual brands on these two attributes, their correlations with usage are still about .8.

It must be noted, however, that whilst useful in bringing out the main pattern in the data, the relative size of the correlation coefficients may not be a sufficient criterion for discriminating between "descriptive" and "evaluative" attributes. Not only can high correlations be obtained as an effect of the large spread of the values, but also the cut-off point between the two kinds of attributes can be subjective. Additional criteria should therefore be used to bring out the "evaluative"/"descriptive" pattern. One of these criteria

[3] In contrast, for the "disagree" and "strongly disagree" responses, the correlations with usage are negative.

is to compare the agreement scores of "Users" with those of "Non-Users". This is discussed below.

4.2.1. Beliefs Among "Users" and "Non-users"

As discussed in Section 2.2., belief responses of "Users" should be considerably higher than those of "Non-Users" for "evaluative" attributes, since these attributes are strongly correlated with Usage. In contrast, since "descriptive" attributes are brand specific factors, derived either from advertising or from a prominent and distinctive characteristic of the brand, both "Users" and "Non-Users" should be able to recognize the features that have become closely associated with individual brands (e.g. that Stowells of Chelsea is a boxed wine).

In Table 2 we compare the differences between the percentage of "*users*" who gave "agreeing" responses, and the percentage of "*non-users*" who gave "agreeing" responses.

Table 2
Differences in "Agreeing" Responses Between "*Users*" and "*Non-Users*"

	Agreeing Responses of "*Users*" minus Agreeing Responses on "*Non-Users*"							
	"Evaluative"					"Descriptive"		
Brands by Usage	**Popular nowadays**	**Value for money**	**Good flavor**	**Refreshing**	**High quality**	**Region of origin is important**	**Attractive bottle**	**Average Belief**
Jacob's Creek	80	83	100	98	52	0	13	**61**
E&J Gallo	56	65	74	73	70	19	51	**58**
Hardy's	70	67	85	75	57	36	66	**65**
Le Piat d'Or	75	66	86	80	43	33	11	**56**
Stowells of Chelsea	92	33	97	33	65	15	36	**53**
Blue Nun	84	87	80	80	77	55	31	**71**
Average	**76**	**67**	**87**	**73**	**61**	**26**	**35**	**61**

A considerably larger percentage of "Users" than of "Non-Users" is found to agree with certain attributes statement. The difference can be substantial, i.e. up to an average 87 percentage points in Table 2 for "good flavor". As mentioned above, larger differences are expected for "evaluative" attributes. Therefore, according to the results in Table 2, "popular nowadays", "value for money", "good flavor", "refreshing" and "high quality" can be categorized as mainly "evaluative". This result helps to explain the high

correlations between these attributes and the Usage of the brand, since large brands have more current "Users" than smaller brands.

In contrast, the differences between "users" and "non-users" agreement scores for the attributes "region of origin is important" and "attractive bottle" are much lower than for the rest of the attributes (at 26 and 35 respectively, on average). This indicates that respondents do not need to be "users" of the brand to agree about these attributes, which therefore show "descriptive" characteristics. This occurs in spite of the fact that these two attributes had not been found to have significantly lower correlations with usage than the other attributes in Table 1. The results in Table 2 do therefore support the expectation that these two attributes should be considered as "descriptive" of brand specific attributes which may be obvious to both "users" and "non-users" alike.

A further pattern, namely the occurrence of the Double Jeopardy phenomenon in our data is discussed below. This is also relevant to the distinction between "evaluative" and "descriptive" attributes.

4.3. Double Jeopardy

The relationship between attribute evaluations and usage is analyzed further in Table 3, where we report the "agreeing" responses *among the "users"* of each brand (Stowells of Chelsea and Blue Nun were not included in Table 3, due to the small number of "users" for these two brands giving potentially misleading results).

Table 3
Double Jeopardy for "Agreeing" Responses *Among "Users"*

			"Evaluative" Beliefs						"Descriptive" Beliefs		
Brands by Usage	% Users	Overall Average Belief	Popular nowadays	Value for money	Good flavor	Refreshing	High qual.	Average Evalua. Beliefs	Region of origin is important	Attractive bottle	Average Descrip. Beliefs
	%	%	%	%	%	%	%	%	%	%	%
Jacob's Creek	56	**83**	94	90	100	98	81	**93**	43	77	**60**
E&J Gallo	46	**81**	88	86	100	96	86	**91**	30	80	**55**
Hardy's	25	**80**	82	85	96	82	78	**85**	52	82	**67**
Le Piat d'Or	11	**70**	75	75	92	83	50	**75**	42	75	**59**
Average	35	**79**	85	84	97	90	74	**86**	42	79	**60**
Correlation with usage	**.63**		**.99**	**.91**	**.97**	**.93**	**.83**	**.93**	**-.38**	**.18**	**-.10**

The results reported in Table 3 are consistent with the Double Jeopardy pattern first remarked by McPhee (1963). For brands, this phenomenon takes the form of fewer belief mentions among the "users" of small brands than among the "users" of large brands. The overall results in Table 3 are consistent with this phenomenon. While 70% of the "users" of the small brand Le Piat d'Or agree with the average belief, 83% do so for the larger brand Jacob's Creek. This is so regardless of the supposed peculiarities of the wine market. The average of the seven correlations for the individual attributes (in the second column of Table 3) is then 0.63. This is positive (and significant), but not any higher because of a sub-trend, in the Double Jeopardy pattern in Table 3, which is useful in discriminating between "evaluative" and "descriptive" attributes.

As discussed earlier in the paper, the theory set out by McPhee (1963) states that Double Jeopardy has to occur as a statistical selection effect in "Users" responses whenever items of otherwise equal merit differ in the awareness level among respondents. This is relevant to "evaluative" attributes which reflect the differing size, or awareness, of a brand, rather than idiosyncratic brand characteristics. Indeed, "evaluative" attributes show up an obvious Double Jeopardy trend. In Table 3 this is illustrated by an average correlation (between the agreement scores of "Users" and usage) of .93 for those attributes which had been classified as "evaluative" in the previous section.

In contrast, for "descriptive" attributes brands do differ in their "merits" and this shows up as a deviation from the general Double Jeopardy trend. Consistently, the "bottle design" and the "region" attributes appear once again as "descriptive", with correlations with usage of -.38 and .18, respectively, in Table 3.

The other notable feature in the data reported in Table 3 is that the gradient in users' agreement scores among the brands is not very large, even for the "evaluative" attributes. For example, 93% of respondents agree with the average "evaluative attribute" for Jacob's Creek, and as many as 75% do so for the smaller brand Piat d'Or. This is in spite of the fact that the two brands differ much more substantially (in the order of 5 to 1) in their usage rates, at 56% versus 11%, respectively. This is consistent with

previous findings (Barnard & Ehrenberg 1998) that whilst "penetrations" (or brand usage) vary considerably from brand to brand, the percentage of users stating an attribute belief tends to vary little amongst brands, except for a small Double Jeopardy trend such as the one illustrated in Table 3. Similarly, in buying behavior, brands are found to vary little in their respective loyalty rates, in spite of large variations in market shares (Ehrenberg & Scriven 1996).

The gradient in attitudinal agreement scores among the four brands in Table 3 is small also due to the effect of the forced-choice questioning used in this study. This may be because the statistical selection procedure which is the basis of Double Jeopardy is dampened by forcing respondents to give an answer for all brands, large and small. The results in Table 3 therefore validate Barnard & Ehrenberg's (1990) finding of a weak Double Jeopardy pattern resulting from forced-choice questioning. The effect, however, is not strong enough to eliminate the Double Jeopardy phenomenon altogether.

5. Discussion

This study set out to examine the strength of the theory about attitude-behavior relationships as proposed by Ehrenberg and colleagues, and found support for their previous work. The purpose of testing whether the theory could be extended to a market whose characteristics are different from any market previously examined was achieved, and it was found that the theory is indeed generalisable to the wine market, in spite of its peculiarities. The same aggregate patterns were also found for a different questioning method (forced-choice) and for different attitudinal strengths.

A number of limitations of the study should however be recognized. The first limitation is the small sample size. This had a number of consequences, including the small number of responses for the lesser brands and the necessity to exclude such brands from the Double Jeopardy results. As earlier mentioned, the proportion of medium or heavy wine drinkers in the sample was over represented (at 85% versus the 74% proportion reported by Mintel 1999). Medium and heavy consumers may be more involved with

wine purchasing and be more aware of the different brands, possibly inflating their claimed usage. However, it should be noted that medium and heavy users do account for over 95% of wine consumed anyway (Mintel 1999). Hence our results should not be greatly affected by this over representation. The other limitation is that the brands tested were all 'large', relatively to the overall number in the market. However, as already mentioned, this was unavoidable, given the necessity to identify recognizable brands and avoid further small sample biases.

The main findings and interpretation are now summarized below.

5.1. Summary of Results

Attribute Beliefs and Brand Usage

Consistent with past studies by Ehrenberg and colleagues, our results showed that agreement with brand attribute evaluations increased with higher claimed usage (i.e. relative brand size or 'penetration'). The correlations between such attribute evaluation agreement scores and usage were positive and greater than 0.76 for all seven attributes. In contrast, disagreement with brand attribute evaluations decreased with higher claimed usage, resulting in negative correlations with usage (see Table A1 in Appendix A).

Our results confirm previous patterns, in spite of the peculiarities of the wine market, such as its great fragmentation, the lack of substantial brand specific advertising support and the reputedly higher purchase involvement.

The internal consistency of the attitude and usage measures has been established in spite of the danger, stressed by several authors (e.g. Heeler & Ray 1972), that close relationships between variables would originate mostly from the effort of respondents to be seen as consistent in their answers. However, in the context of the number of studies reporting such patterns (e.g. Bird & Ehrenberg 1966, Bird et al. 1970, Barwise & Ehrenberg 1985, Castleberry & Ehrenberg 1990, Dall'Olmo Riley 1995; and our evidence here), the consistency of the correlation between usage and attribute scores is

staggering, given for instance differences in the degree of purchase involvement across products (i.e. reputedly higher for wine and lower for laundry detergents). Furthermore, the number of products, brands and attributes used in some of these studies would make it extremely difficult for respondents to purposely achieve such high degree of consistency in their answers.

Moreover, although some consistency bias is conceivable, the pattern for "descriptive" attributes and the occurrence of Double Jeopardy would seem to suggest that such bias does not affect large and small brands in the same way, and other factors should be considered. For instance, there is evidence that the exposure to a stimulus (in our case to a brand) influences its perception and its degree of liking (Zajonc 1968), and has the effects described by Double Jeopardy theory (McPhee 1963). Moreover Bem (1967) has suggested that attitudes are expression of people's self-perceptions of their behavior (e.g. "I must like brown bread, because I am always eating it").

However, future research should resolve this issue of internal consistency further, first by means of wide replication, and then by testing if changing the order of the questions across respondents in a randomized manner affects the relationship between attitudinal responses and usage in any way. This procedure is suggested by many authors (e.g. Oppenheim 1992) as a way of testing for any bias arising from the order of the questions.

Scaling and the Strength of the Attitude

The extension to a scaling technique for measurement revealed the expected pattern of results, i.e. the positive relationship between attitudes and usage. No sub-patterns were found relating to different attitude strengths. The positive relationship between attitudes and usage occurred to the same extent for the “strongly agree” and the “agree” responses in a forced-choice situation. This result indicates that no great commitment or attitude strength is necessary for the known patterns to occur.

The conclusion of this extension is therefore that "free choice" and scaling reveal similar relationships; yet "free choice" produces less data and is therefore easier and clearer to analyze, and may be preferred in this kind of work.

"Evaluative" versus "Descriptive" Attributes

The distinction between "evaluative" attributes - which vary with brand usage - and "descriptive" attributes - which do not - was also tackled in the context of the wine market. First we compared the relative sizes of the correlations between usage and attribute statements. The correlations with usage of the two attributes which we had 'a priori' classified as "descriptive" were indeed lower (at about .8) than the correlations with usage of all other statements (.97 or higher), but not in a significant way. This may indicate that "evaluative" and "descriptive" attribute statements operate in a continuum, rather than being two discrete types of judgments. Perhaps it would be more appropriate to talk about "mainly evaluative" versus "mainly descriptive" attributes.

However, when we compared the agreement scores of the "Users" and "Non-Users" of each brand, we did find evidence for the differentiation of two attributes as "descriptive", as the differences in "agreeing" responses between "Users" and "Non-Users" were substantially smaller than for the other five attributes. This indicated that the respondents did not need to be users of the brand to have positive attitudes about these two attributes. In contrast, all other attributes behaved as "evaluative", with large differences between the agreement scores of "users" and of "non-users". Our results confirmed that "descriptive" attributes only account for a small percentage of all attributes, as discussed in more detail elsewhere (Dall'Olmo Riley et al. 1997). They also confirmed no apparent causation between brand specific "descriptive" attributes and brand choice.

Double Jeopardy

We also investigated the occurrence of the Double Jeopardy phenomenon. Specifically, since the brands chosen did not differ markedly in market share, with no consistent brand leader from month to month (Mintel 1999), it might have been conceivable for the Double Jeopardy effect not to occur. Yet, in spite of the brands' similarly low market shares, they varied a lot in terms of their 'penetrations' (or degree of awareness) among respondents. As discussed in the Results section, 'penetrations' and market shares are two distinct, but related measures of the relative size of the brands. The wide variations in the brands' 'penetrations' was enough for the Double Jeopardy phenomenon to be manifest in the data. The result is, however, "real" and not an artifact of the measurement technique, as demonstrated by the fact that the use of force-choice questioning was not enough to overcome the statistical selection procedure upon which the Double Jeopardy theory is based. (As expected, an exception did arise for the two "descriptive" attributes concerning bottle design and region of origin, for which the correlations with usage were low or even negative.)

Once again, therefore, neither the peculiarities of the wine market nor the type of measures employed affected the occurrence of the known patterns.

5.2. Managerial Implications

In contrast with many failed attempts in previous literature to predict the buying behavior of individual consumers from measures of their attitudes, the results presented in our paper show strong support for the generalisability of Ehrenberg's theory of the usage-attitudes consistency.

Such results are useful to management and marketers conducting attitudinal research not only within the wine, but also within other industries. First of all, our results have stressed the necessity to shift the emphasis of attitudinal research from a deterministic and predictive Attitudes → Behavior causality to a diagnostic Behavior/Experience →

Post hoc Evaluation approach. This is strongly supported by the found correlations between the relative size of the brands and consumers' attitudinal evaluations. These showed no idiosyncratic differences among brands that would justify (or cause) brand choice. This was also so for those attributes which reflect peculiar characteristics of individual brands, such as their country of origin or their packaging. Neither appeared to be determinant of brand choice.

This study provides managers with an understanding of "normal" market behavior with respect to:

- The relationship between attribute beliefs and brand usage (or relative size). Awareness of these different patterns can be useful to managers for the interpretation of attitudinal statements. For example, managers should question to what extent are attributes "determinant" (e.g. Myers & Alpert 1968, Alpert 1971, Armacost & Hosseini 1994) in influencing consumers' choices and to what extent do they merely reflect the relative size of the brands.

- The Double Jeopardy phenomenon for brand attitudes. The effect of Double Jeopardy can also be seen as a valuable point for managers and marketers to consider. They must acknowledge that it is often unrealistic to expect a small brand to achieve more positive attitude scores than a large brand.

An overriding implication for all managers and marketers from the results of this study is that in order to spread positive attitudes towards their brands, they must encourage actual 'trial' and usage of the brands, as this is what leads to the attitudes concerning the brands. Managers should therefore take this as an indication that distribution is very important and brands must be very widely available and promoted in store, in order to obtain and reach a large number of consumers, especially in increasingly cluttered markets (such as wine). The rise in supermarket wine sales (accounting now for 60% of the wine market in the UK) favors branded wines supplied by big producers. Not only

shoppers are likely to be attracted by a wine they have heard of, but the supermarkets themselves like branded wines which make up for high-volume sales (Rachman 1999).

Increasing distribution and usage poses a challenge especially for the smaller producers whose resources are limited. While achieving distribution by the big grocers and off-license chains might be infeasible, smaller brands may profitably compete in independent retailers and may also aim at building relationships with distributors serving restaurants and caterers. Promotional activities at the point of sale seem to be an effective method of increasing awareness of wine brands, resulting in over a third of wine buyers deciding what to buy when in the shop (Mintel 1999). These below-the-line activities should not be a major drain on the resources of wine producers, and can be undertaken on behalf of both large and small brands.

This research can direct marketers towards a more market oriented approach, as it gives a clearer picture of how consumers behave in the market, the attributes that are most closely associated with usage, and the importance of obtaining wide distribution and a large brand share. Specifically for brand managers of the six brands in this study, it also gives a clearer picture of where these brands are in relation to their competition, and within the mind of the consumers. However, through this and previous research, the same general patterns are becoming established whatever the peculiarities of individual markets.

Finally, the finding that the use of a scaling technique provides no new or more detailed results than the use of the method of 'free choice' is valuable information for market researchers, as it prevents time wasted over more time consuming measurement methods.

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Appendix A

Table A1
Responses for Each Level of Agreement with Each Attribute Statement

	'Users' (%)	Popular nowadays (%)	Value for money (%)	Good flavor (%)	Refreshing (%)	High quality (%)	Region of origin is important (%)	Attractive bottle (%)	Average Belief (%)
Jacob's Creek	**56**								
Strongly agree		23	8	15	12	4	4	11	11
Agree		60	68	66	64	69	38	62	62
Neither		9	18	12	15	20	13	21	15
Disagree		7	6	7	9	7	36	2	11
Strongly disagree		0	0	0	0	0	9	4	1
E&J Gallo	**46**								
Strongly agree		16	6	16	7	9	4	17	11
Agree		43	53	52	60	44	17	44	45
Neither		31	29	16	21	28	25	32	26
Disagree		13	12	14	10	16	43	7	16
Strongly disagree		0	1	1	3	4	11	0	3
Hardy's	**25**								
Strongly agree		6	3	11	7	10	2	5	6
Agree		35	33	31	29	33	32	36	33
Neither		47	43	39	44	43	31	55	43
Disagree		11	18	17	16	12	26	4	15
Strongly disagree		1	3	3	4	3	10	1	4
Le Piat d'Or	**11**								
Strongly agree		5	6	3	3	4	2	6	4
Agree		14	15	20	16	14	12	58	22
Neither		22	36	31	34	24	17	19	26
Disagree		55	38	35	38	48	51	13	40
Strongly disagree		4	5	11	9	11	18	4	9
Stowells of Chelsea	**5**								
Strongly agree		4	1	3	0	1	3	3	2
Agree		19	27	20	16	20	7	18	18
Neither		58	50	53	54	40	29	58	49
Disagree		17	15	18	22	32	46	19	24
Strongly disagree		2	7	6	8	7	15	2	7
Blue Nun	**4**								
Strongly agree		3	0	0	0	0	2	2	1
Agree		18	18	6	6	7	5	29	13
Neither		28	33	17	24	9	17	23	22
Disagree		40	30	43	48	41	45	32	40
Strongly disagree		10	18	34	23	42	31	14	25

Table A2
Correlations Between Brand Usage and Level of Agreement with Each Statement

	Popular nowadays	Value for money	Good flavor	Refreshing	High quality	Region of origin is important	Attractive bottle	Average Belief
r with usage								
Strongly agree	.96	.81	.95	.94	.56	.80	.91	.85
Agree	.95	.94	.97	.99	.95	.78	.63	.89
Neither	-.53	-.75	-.60	-.64	-.02	-.22	-.25	-.43
Disagree	-.65	-.73	-.78	-.81	-.83	-.44	-.79	-.72
Strongly disagree	-.71	-.80	-.66	-.76	-.62	-.71	-.45	-.67