

# **Qualitative Foundations of a Study into Category Choice amongst Alcohol Purchasers**

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## **Abstract**

This paper reports on the qualitative foundations of a choice experiment that will examine the social, situational and personal factors that influence consumers' choice behaviour at the category level. A model of cross-category consideration is presented. The model highlights the importance of consumer goals in the cross-category choice decision. Findings from the qualitative research suggest that consumers, when faced with consumption situations that carry a degree of social unfamiliarity, make choices from alternatives that stretch across categories.

## **Introduction**

Consumers usually choose between alternatives from the one product category – known as “within-category” choice (Felcher, Malaviya and McGill, 2001). Occasionally, consumers will consider products that belong to different or multiple categories, the classic example being that of gift-giving (Russell *et al.*, 1999; Shocker, Bayus and Namwoon, 2004). Such “cross-category consideration” will be higher in cases of goal conflict and goal ambiguity (Ratneshwar *et al.*, 2001; Ratneshwar, Pechmann and Shocker, 1996; Russell *et al.*, 1999).

The single-category paradigm dominates choice literature in marketing (Russell *et al.*, 1999). Shocker, Bayus and Namwoon (2004, p.35) note that “research is needed....to identify the circumstances in which cross-category consideration and choice are most (least) likely to occur. Whether the stage of product life cycle, individual differences (e.g., experts versus novices, different personality types) purpose, or other factors matter more has not been investigated”. This current research advances the knowledge of category choice through an examination of the way social, situational and personal factors impact upon cross-category consideration amongst alcohol purchasers. Although a body of literature exists in the area of alcoholic beverage preference amongst at-risk and problem drinking groups (see, for example, Corcoran, 1995; Corcoran and Segrist, 1993; Martino *et al.*, 2006), little research has been conducted in relation to alcoholic beverage choice in “everyday” purchase scenarios.

## **Category Choice**

A category is a set of objects that are considered equivalent (Rosch, 1978). In a marketing context, a product category is a set of products that the buyer views as closely substitutable in meeting his or her needs, and is part of a broader hierarchical structure of decreasing generality from the most general categories of products and services to specific brands (Howard and Sheth, 1969). Van Osselaer *et al.* (2005) argue that consumer motives and goals are an important factor in how consumers perceive products cognitively, and that these representations are likely to be flexible and dependent upon the situation and context. Nominal (or taxonomic) category definitions may therefore not always align well with the goals consumers utilise in decision-making (Russell *et al.*, 1999; Ratneshwar *et al.*, 2001).

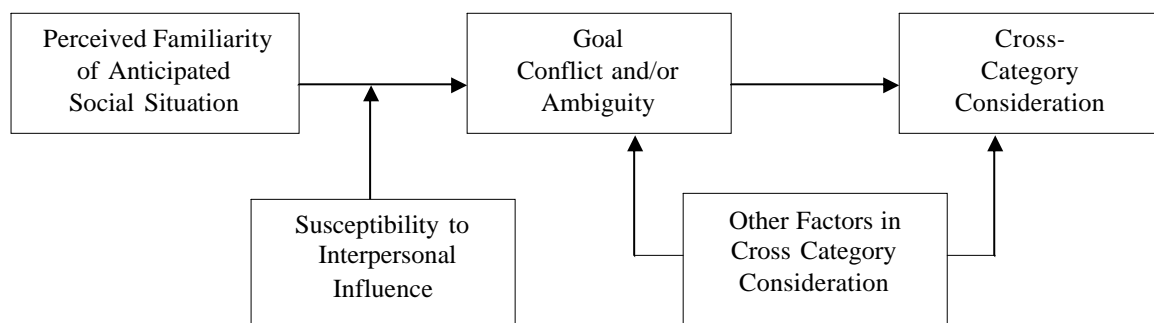
Hence, in a marketing context, it is important to make the distinction between taxonomic product categories (for example, breakfast cereals) and goal-derived product categories (for example, getting something quick and easy to eat before going to work) (Felcher, Malaviya and McGill, 2001). The distinction between taxonomic and goal-derived product categories is not always clear-cut. Nevertheless, an extreme generalization can be made that within-category (eg brand) choice often reflects consumers' use of taxonomic categories, while across category choice reflects the use of goal-derived categories (Lawson, 1997; Felcher, Malaviya and McGill, 2001). The features that members of the two types of categories share differ in two important ways: first, the features in taxonomic categories tend to be *context independent*, that is, they are relatively well-defined and stable across people and situations, whereas the features of products related by a consumption goal but belonging to different taxonomic categories are relatively *context dependent*. These features become salient only when the products are considered in a particular consumption context. The second difference between taxonomic and goal-derived categories is that members of a taxonomic category are perceived as sharing more *attributional* features (features relating to the object itself) and fewer *relational* features (features referring to the relationship the object might have with other objects), with the reverse being true in the case of members of a goal-derived category (Felcher, Malaviya and McGill, 2001). A finding from the Felcher study is that consumers generate broader (that is, across-category) choice sets in less-familiar situations, presumably because they are uncertain about the goals that should be adopted in the situation. The situational context provides a "stage-setting" role, with contextual and social cues utilised in formation of consideration sets that stretch across categories (Ratneshwar, Pechmann and Shocker, 1996; Russell *et al*, 1999).

### **Social and Situational Influences on Consumer Choice**

Usage situations play a major explanatory role in consumer choice. It is thought that the usage context is a factor that can aid consumer decision making by imposing constraints upon the possible solutions to the consumer problem-solving process (Warlop and Ratneshwar, 1993). Individuals make use of social norms to interpret and respond to the usage context. Deutsch and Gerard (1955) distinguished two types of social norms - informational and normative. Informational influence results from actively seeking information from others or from observing the behaviour of others (Park and Lessig, 1977), and occurs through a process of internalisation (Burnkrant and Cousineau, 1975). Two types of normative social influence have been identified in the literature: utilitarian and value-expressive influence. Utilitarian influence occurs through a process of compliance where individuals conform to the expectations of others so as to receive rewards or avoid punishments. Value-expressive influence occurs through a process of identification where individuals associate themselves with positive referents and distance themselves from negative referents in order to enhance or support their self-concept (Park and Lessig, 1977). Bearden, Netemeyer and Teel (1989) developed and validated a scale (SUSCEP) that measures consumer susceptibility to interpersonal influence as an enduring individual difference (Clark and Goldsmith, 2005). Susceptibility to interpersonal influence is conceived as a general trait that varies across persons, but remains relatively constant across social situations for given individuals (Bearden, Netemeyer and Teel, 1989).

In summary, it can be seen that consumer choice is largely top-down or goal driven at the category level, and that social and situational factors help shape and modify consumer goals especially in the case of cross-category consideration where goal ambiguity or goal conflict may be evident. Goal determination is likely to be more immediate and extensive when a

consumer is confronted with a new or non-routine situation, for example when comparative strangers are likely to be present at an anticipated usage or consumption situation. Consumers will generate broader cross-category choice sets in such less-familiar social situations because they are uncertain about the goals that they should adopt. It should be emphasised of course that various factors are likely to impact upon cross category consideration, be they personal, interpersonal or situational. For example, the nature of the choice environment may lead to across-category consideration when the number of available alternatives is constrained (such as with a limited selection of beverages on a restaurant menu), or when the visual arrangement of choice alternatives may juxtapose competing categories (such as in a retail store display) (Ratneshwar *et al.*, 1999; Shocker, Bayus and Namwoon, 2004). While it is acknowledged that other factors will play a role in cross-category consideration, they have not been modelled separately in the interests of maintaining a focus upon the social and interpersonal factors (of the anticipated consumption setting) that may influence cross-category consideration at time of purchase. In light of the preceding discussion, the following model of social and situational influence on cross-category consideration is put forward (see Figure 1). The model proposes that when a consumer is faced with an anticipated unfamiliar consumption situation (for example, when comparative strangers are likely to be present) the consumer, depending on his/her susceptibility to interpersonal influence, is more likely to engage in cross-category consideration and choice at purchase because of the uncertainty created by the presence of indeterminate and/or potentially competing purchase goals.



**Figure 1: Conceptual Framework for Cross-Category Consideration**

### Methodology

Alcoholic beverages have been selected for this research because they provide a suitable vehicle for examining consumer choice across different product categories (wine, beer, spirits, mixers, etc). Further, alcohol is consumed across a variety of drinking occasions, permitting the development of distinct scenarios that can be varied according to the degree of familiarity (to a given individual) of the people anticipated to be present (e.g., privately at home with family, at a barbeque picnic with friends, or perhaps a more formal dinner occasion with people who are merely acquaintances). It is intended that the model shown in Figure 1 will be tested by means of a mixed methods research design of qualitative research followed by quantitative research.

This paper presents the preliminary findings from the qualitative phase of the research (the quantitative phase will use a choice experiment to understand how consumers go about choosing an alcoholic beverage in store for consumption at different social situations). This

qualitative phase of the design comprised 24 in-depth semi-structured consumer interviews. The interviews were conducted with the view of eliciting information about subjects' choice considerations for alcohol in different social situations, and the impact of goal-driven factors on their choice. Subjects were selected via a modified snowball sampling technique. Care was taken to ensure that an equal number of male and female subjects were recruited, together with an even distribution of beer, wine and spirits drinkers, and an even distribution of age groups over the age of 18. The interviews were audio-recorded with the majority lasting around three-quarters of an hour. The interviews were analysed using NUD\*IST computer software. Data obtained from the interviews highlighted the dimensions along which consumers evaluate alcoholic beverages and in particular provided guidance to the development of appropriate consumption scenarios for use in the quantitative research phase.

### Findings and Implications

The interviewees mentioned a variety of motivations or goals when considering the purchase of alcohol for different social occasions. With respect to occasions with familiar people, such as a family barbeque, the major goal for many was self-satisfaction. For example, when Travis purchases alcohol for consumption with family and friends at a barbeque, he feels no need to change his usual purchase or consumption patterns, as he explains as follows

*“[For a barbeque] I would bring the beer I drink and nothing else... the situation has got nothing to do with my choice, I can just make the choice I prefer, I could basically buy anything in the liquor store because the people around me couldn't care about what I'm drinking, so it just depends on me, what I feel like on the day”* Travis (primarily a beer drinker) – see footnote concerning use of interviewees' names.

With respect to social situations with a degree of unfamiliarity (for example, a dinner party with people of only passing acquaintance) several participants spoke of their alcohol choice in terms of its relational aspects, that is, how the others at the dinner would most likely perceive their drink choice. Allied to this was the sense that their choice reflected to some degree a conflict of goals, that is, the wish on the one hand to purchase their usual drink, but on the other, also one that all at the anticipated dinner party would enjoy. The following comments illustrate this motivational conflict

*“[For a formal dinner occasion] I would think of what the host likes, and then I would say OK, it doesn't really matter if I like it, I would buy a light red or something, and [because] there may not be anything [at the dinner party] I would like, I would just sit there with a glass of wine that I won't drink”* Stephanie (primarily a beer drinker)

*“I'll be thinking about what a lot of people like to drink, and not everybody likes red [wine], so I'll probably go champagne, or a nice light crisp white [wine]. My host or friend who is having this dinner party might be under a bit of stress, so anything that would help that person out I would be interested in doing. I would be worried or concerned that people may not like red so I'd stick to something that I think would be a popular choice”*

Debby (primarily a red wine and champagne drinker)

The feelings of anxiety expressed by the subjects in the quotes above may be explained as stemming from goal conflict due to the gift-giving character of the purchase. Dissonance between individual goals and group expectations have been cited as a source of anxiety among givers (Green and Alden, 1988; Wooten, 2000). Research has shown that anxiety is a common occurrence with gift-giving (Sherry, McGrath and Levy, 1993; Wooten, 2000; Roster, 2006) and that the antecedents of gifting anxiety include the importance, formality and novelty of the occasion, as well as unfamiliarity or lack of knowledge about the recipient's tastes, wants or needs (Wooten, 2000). The following comments of David and Brenda reflect these considerations

*"I would like to take something that is a conventionally nice drop that would be recognised as being a nice contribution, just as you might take a bunch of flowers or some chocolates. It may well not be opened, I mean, it may well be that it gets put down and what's going to be drunk has already been opened and allowed to breathe. [The other people present] would only notice it if you turned up with something extraordinarily good or extraordinarily bad. Extraordinarily bad would be a cleanskin, unless it had some sort of provenance"* David (wine and beer drinker)

*"For an occasion that's not familiar, because you don't know the people, in your mind you think you've got to put on a better show...and choose a reliable wine, one you can depend on, hoping it won't be corked...I wouldn't necessarily buy something I didn't like...but if the host doesn't think so, he can keep it for another occasion"* Brenda (primarily a red wine drinker)

Many participants provided instances of cross-category consideration when faced with a non-routine social situation or one where unfamiliar people would be present. For these occasions, in contrast to familiar ones, participants would consider the purchase and/or consumption of an alcoholic beverage they normally wouldn't purchase or consume. The comments of Sarah and Debby are representative of these two contrasting scenarios:

*"[For a dinner party] I try and pick something in store that other people will like, because people might be at this dinner party that have lots more experience than me.....and I think naturally people will look at the label when you bring a wine to a dinner party"* Sarah (primarily a white wine drinker)

*"Because a BBQ is a lot more casual, it's not so important what other people think. A lot of times at BBQs people will bring their own and drink it themselves. It's more relaxed, so I'd be more inclined to bring something I like, as well as what other people might happen to like"* Debby (primarily a red wine and champagne drinker)

The preliminary findings from the qualitative research suggest that consumers, when faced with consumption situations that carry a degree of unfamiliarity, do indeed make choices from alternatives that stretch across categories. The situation provides a "stage setting" role, in which social and other cues are used to determine the relative merit of the different alternatives. In more formal or non-familiar situations, consumers appear to take into account the role of others in their motivations or goals for purchase. This degree of goal determination is less likely to occur in more familiar scenarios (such as purchasing an alcoholic beverage for consumption at home with family) as goal determination has occurred some time in the past. The information derived from the qualitative interviews will be used in

the quantitative phase of the research to develop consumption scenarios that, while being explicit, allow for the unrestricted selection of beverages across categories. The qualitative research clearly highlights the importance of studying the social, situational and personal factors that influence cross-category decision-making.

**Footnote:** For reasons of privacy, the names of the interviewees have been changed.

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