Regularities in buyer behaviour and brand performance: The case of Australian beer

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Abstract

In recent years, there have been calls for more emphasis on empirical generalisations in marketing. An empirical generalisation is a 'pattern or regularity that repeats over different circumstances'.[1] Empirical generalisations are important for marketers. They provide a fact base from which to work, and are distinguished from mere opinions—even very learned or considered opinions. Three empirical generalisations to be discussed in this paper originated from the work of Ehrenberg and his colleagues. They are (1) repertoire buying, (2) the 'double jeopardy' phenomenon and (3) the duplication of purchase law. While many studies have demonstrated these generalisations, more evidence from other markets and conditions would be useful. Indeed, marketing textbooks typically do not discuss these findings, which limits the chance that practitioners become aware of them. This study examines whether these three established generalisations hold in quite a different market to those considered previously—the market for beer in Australia. Local market wisdom and other published research casts doubt over their applicability to this market. Therefore this study can either identify an exception to these generalisations, or find that they do apply where arguably they would not be expected to apply. The study finds that Australian beer drinkers do buy from repertoires of brands, that the brands do exhibit the classic double jeopardy pattern in loyalty, and that the duplication of purchase law also holds in this market. Therefore Ehrenberg's findings hold in another new context, one in which they were not necessarily expected to. The implications from these findings are that marketers should not expect many of their buyers to be very loyal, rather they should view them as people who occasionally buy their brand among a portfolio of other competing brands. Secondly, marketers should recognise that brand loyalty metrics are largely dictated by market share levels, and that somewhat lower levels of loyalty to smaller brands are to be expected. Thirdly, marketers should view their competition more widely and not focus too much on any one specific competitor brand. Rather, brands usually compete with all other brands in the market approximately in-line with the size of those other brands. This is to be expected unless there are marked functional differences between the competing brands.

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INTRODUCTION

Over a period of decades from the 1960s, Andrew Ehrenberg along with colleagues, principal among them Gerald Goodhardt, developed a series of empirical generalisations in marketing. They specifically pertained to buyer behaviour and brand

performance. A recent summary of this work can be found in the *Journal of Business Research*.[2] There have been many calls in the literature since the 1990s for a focus on empirical generalisations in marketing as a basis for knowledge development (eg Bass;[1] Barwise;[3] Ehrenberg;[4] Wright and Kearns[5]). Why are empirical generalisations important for marketers? The answer is that marketing strategies are more likely to be successful if they are based on an accurate understanding of buyer behaviour and brand performance. How is one to achieve this understanding? By turning to established knowledge about such phenomena—knowledge based on results that replicate over different conditions, markets and time. In other words, empirical generalisations. For example, Ehrenberg Uncles and Goodhardt pose a marketing strategy scenario: to launch a new coffee brand as a niche brand appealing to a tiny part of the market who would be intensely loyal to it; or as an extreme mass-marketing brand bought by many people but only once per year. The empirical generalisations based on their prior work showed that neither of these strategies would be tenable, as neither scenario produced anything like the existing patterns of performance seen in that market or in others. Rather, the brand would sit somewhere between these two strategies in terms of the number of buyers it would attract and their level of purchasing loyalty.

Textbooks are obviously a very broad way of disseminating knowledge about empirical generalisations. Have these three findings of Ehrenberg's made their way into textbooks? I examined a convenience sample of eight popular general marketing texts published since 2000 to answer this question. The texts were as shown in Table 1.

Table 1 Sample of recent textbooks

Title	Author and year published
Marketing Management: 12th Edition	Kotler and Keller[6]
The Fundamentals and Practice of Marketing: 4th Edition	Wilmshurst and Mackay[7]
Marketing Strategy and Management: 3rd Edition	Baker[8]
Introduction to Marketing	Dann and Dann[9]
Principles and Practice of Marketing: 3rd Edition	Jobber[10]
Essentials of Marketing: 4th Edition	Lamb *et al.*[11]
Marketing Principles and Best Practice: 3rd Edition	Hoffman *et al.*[12]
Marketing: 4th Edition	Solomon *et al.*[13]

Across the eight texts, only one oblique reference to these findings is evident. Hoffman *et al.*[12] refer to polygamous loyalty (p. 340), but do not elaborate on it. Polygamous loyalty basically describes repertoire buying. Apart from that mention, none of the eight texts discuss these three empirical findings. There are several reasons why this might be the case:

— Textbooks cover a broad range of topics, and perhaps there is little space left to discuss such issues.
— Many textbook authors are unaware of these findings.
— Perhaps textbooks—particularly 'general' texts such as these, are not seen as the appropriate platform for empirical generalisations by their authors.

In any event, the upshot is that many readers of such books will not know about these generalisations, which are arguably very important. Their importance is discussed in the following section. Arguably there is a case for more investigation and dissemination of them, as this will (1) potentially extend the existing level of generalisability, (2) disseminate this information and (3) possibly prompt

additional interest in these and other empirical generalisations among researchers.

The three findings that are pertinent to this study are now discussed.

(1) Repertoire buying: Most buyers buy from a repertoire of brands. Few are solely loyal and the ones who are, tend to be less frequent buyers of the product category.[14] This finding was initially based on analyses of packaged goods markets, indeed such markets are often called 'repertoire markets' to distinguish them from the so-called 'subscription' markets where a buyer has an ongoing trading relationship with a provider for a time period—such as banking, insurance or telecommunications.[15] Recent work has, however, shown that in such subscription markets, people also buy from a repertoire of brands—for example in banking, many consumers use two or three banks for their gamut of requirements such as transaction accounts, loans or investments.[16] Even in industrial purchasing situations such as aviation fuel contracts, repertoire buying is seen.[17,18]

It is worth noting that the process of buying multiple brands from a repertoire over time is sometimes called, or interpreted as, 'brand switching'. Indeed, Ehrenberg and Goodhardt[19] used the term to describe consumers switching between television shows (but not brands, in that paper). The interpretation of the word 'switching' in the context of brand buying may, unfortunately be interpreted as a *rejection* of one brand in favour of another. Repertoire buying, however, simply means the buyer routinely purchases from a selection of brands—there is not necessarily any conscious decision to 'switch' or 'reject' one over another. This is evidenced by the fact that a particular brand is bought, then perhaps another on the next purchase occasion—then the first one is bought again. Over time, a purchase sequence among three brands for a given consumer may resemble this: A, A, B, A, C, B, C, A and B. This is hardly indicative of rejection of any brand. The notion of rejection or 'switching away' is not consistent with the fact that the brand supposedly 'switched from' is bought again at a later date, and for a given consumer, this process could repeat itself dozens or hundreds of times over a period of years. As Bass *et al.*[20] put it, 'it is … possible that switching occurs without a change in the behavioural state of the consumer' (p. 267).

Implications of repertoire buying: The fact that one's customers freely buy from a repertoire of competitor brands appears at odds with conventional views on consumer behaviour. The conventional view is that consumers engage in fairly extensive cognitive processing to evaluate the relative merits of competing brands.[21] Logically, this implies that consumers should confine their purchases to *a* brand—the brand that suits them the best. Indeed, marketing textbooks suggest consumers must be convinced of unique benefits in order to buy:

> 'the brand must demonstrate clear superiority …. Consumers must be convinced that Louis Vuitton has the most stylish handbags, Energizer is the longest-lasting battery and Merrill Lynch offers the best financial advice and planning' (Kotler and Keller,[6] pp. 313–314). 'the marketer attempts to convince consumers that a particular brand is distinctive and that they should demand it over competing brands' (Lamb *et al.*,[11] p. 205).

This notion is contradicted by the empirical evidence of widespread repertoire buying. Not many consumers are likely to be convinced that *one* brand is superior, if they are routinely buying from a *range* of brands within a category. The marketing implication is that it is often unrealistic

and unnecessary to attempt to convince consumers that one's brand is *best*, at least not for established brands in repetitively bought categories. Instead, perhaps the marketer should recognise that their brand is good enough for people to buy, but given that they also buy other brands there is scope for consumers to *forget*. Therefore the goal should be to keep reminding the consumer, in the most efficient manner possible, to buy the brand from time to time.

(2) Double jeopardy: Small brands have far fewer buyers and somewhat less loyalty.[22] Therefore the major difference between competitive brands is the number of people who buy them, not how loyal they are to them. Double jeopardy has been found to hold in diverse circumstances. A selection of published papers that have found double jeopardy effects is shown in Table 2.

While in general, there is a clear relationship between brand size and brand loyalty, some departures to this relationship have been documented. Bhattacharya[32] analysed the double jeopardy effect across 372 brands in 34 categories and while the overall pattern was persistent, there were exceptions, with many brands arranged in some degree of 'scatter' around the double jeopardy line. A long-standing deviation is that market-leading brands enjoy even more loyalty than what they should get, given their size.[33] Rungie,[34] however, points out this may be an artifact—what is considered to be excess loyalty for a market-leading brand depends on what mathematical model is used to calculate the expected level of loyalty.

Table 2 Double Jeopardy effects

Market/context	Authors
Packaged goods	Allsopp *et al.*;[23] Ehrenberg *et al.*;[22] Ehrenberg and Goodhardt[24]
Cars	Colombo *et al.* [25]
Forest products	Michael and Smith[26]
Respondent's selection of scale point responses in surveys	Dawes[27]
Politicians and political parties	Ehrenberg[28]; Solgaard[29]
Brand awareness	Macdonald and Sharp[30]
Perceptions of trust in the brand	Bogomolova and Romaniuk[31]

Implications of double jeopardy: The fact that loyalty typically does not vary hugely between competitive brands, and has a close relationship with market share, suggests a constraint on the limits of what can be achieved in terms of brand loyalty. A brand of a particular size will 'naturally' have a certain level of loyalty, and it appears very hard to change this independently of brand size. Even dedicated loyalty programmes tend to have only fairly minor effects on repeat-purchase loyalty.[35] The upshot is that the most reliable way of increasing brand loyalty is to grow market share!

(3) Duplication of purchase law: The duplication of purchase law is simply that brands share their customers with other brands in-line with the size (market share) of those other brands. This phenomenon was first shown to exist for television viewing where viewer switching between programmes was shown to depend mainly on the overall ratings of the programme switched to.[19] It was also well expounded for packaged goods in the textbook 'Repeat Buying'.[14] The duplication of purchase law has also been identified in purchasing of consumer services,[36] durables[37] and in business to business contexts.[17,18]

It is worth noting that if one examines patterns of purchase sharing across quite different product formulations or variants, there may be quite marked 'partitioning'.[38] This means that there are groups of brands

or products competing with each other more intensely than expected.[39,25] For example, if we analyse the broad category of 'cars' as a market—including small size cars, sports cars and SUV's, then there is a greater switching between the brands within those functionally different types[40] than across them. But when one analyses a set of brands that share mostly similar characteristics—say, brands of soft drinks[41] then the duplication of purchase law holds well.

Implication of the duplication of purchase law: When the brand's customers are not buying it, which other brand are they buying? Which brands does one gain sales from and lose sales to the most? The duplication of purchase law illuminates this question of competitive structure. Brands gain and lose more to the other big brands and less to the other small brands. This is true unless there are pronounced functional differences between the brands. For example, gains and losses among car brands is mainly dictated by market share—but this is mitigated by certain obvious functional differences.[25]

The marketing implication is that competition between brands is generally 'head on'—brands tend not to be partitioned off from the rest of the market and compete against a single competitor. Rather, it is 'brand A versus the rest of the market' for a share of customer's purchases.

These three findings are important, basic 'facts' that all marketers should know. As shown in the discussion, they contextualise many other topical concepts and ideas in marketing. But many marketers may tend to think their particular market is different, or that broad-scale generalised findings may not apply. Or they may simply not be aware of these findings, given their absence in textbooks. Therefore, a process of further investigation and replication is desirable. How widely does repertoire buying, double jeopardy and the duplication of purchase law apply? Are there markets where they do not?

EXTENDING GENERALISABILITY

The purpose of this paper is to investigate whether these three empirical generalisations hold for a quite different product market and context: Australian beer. It is fair to say that the international image of the Australian beer drinker is one of a blue-collar, heavy drinking, knockabout character, and one for whom beer consumption is a serious affair. In Australia, advertising for beer portrays a 'religious trinity of masculinity, nationalism and beer'.[42] A recent study reported that Australian beer drinkers 'employ beer consumption as an effective form of [personal] image management'[43] and that they '…demonstrated a need to monitor other's reactions to their choice of beer brand' (p. 117). From this description, choice of beer brand sounds more considered than the normal small-value consumer purchase. Perhaps under such conditions we might not expect to see the law-like patterns of behaviour that have been documented in the scholarly journals and texts cited. Rather, we might expect to see the Australian beer drinker as one who is heavily involved with their favourite beer brand and for whom the concepts of multi-brand buying, duplication of purchase and lessened loyalty for smaller brands would be anathema. Indeed, this seems to be aligned to the views from industry. Management of Fosters, one of Australia's largest brewery/wine companies describes brand loyalty to its brand as 'intense'.[44] The Managing Director of Fosters, which also owns the famous VB and Carlton brands in Australia, when queried on the potential for Carlton to

cannibalise VB sales, was quoted as follows:

> '…[he] rejected any suggestions there was cannibalization between the two brands. "The core VB drinker is very loyal to VB" he said … the Carlton range of products were pitched at a different set of drinkers [to VB]'.[45]

Based on this insider knowledge, beer in Australia might be a different type of market that does not adhere to the norms found in many other markets. I therefore report on a study designed to examine this issue.

THE STUDY

This study is based on a survey among patrons of the unique antipodean sport, Australian Rules football. Staff from a commercial market research organisation conducted face-to-face interviews with 620 people attending Australian Rules football matches in a mainland state of Australia. Recruitment was random selection among the patrons at the sporting venue. Respondents provided information on which brands of beer they currently purchased. They were simply asked by the interviewer, 'Which brands of beer do you drink currently?' These data have the shortcoming that they do not include actual usage, but are still certainly adequate for the purposes of this research.

I analysed the data to see if the three empirical generalisations emerging from Ehrenberg's work would surface in this Australian context. I consider this to be a 'strong test' of Ehrenberg's generalisations, by selecting not just the ordinary or infrequent consumers of beer, but a particular group that is more archetypally 'true-blue Australian' and more likely to be enthusiastic, brand-loyal consumers of beer.

The results for each generalisation are now discussed. Note that the Australian beer market is regionalised and so some brands that are well-known internationally, such as Fosters, do not feature in this analysis because they are not promoted in the state where this research was conducted.

REPERTOIRE BUYING

Repertoire size is the average number of different brands used by the consumers of each brand. These Australian beer drinkers typically satisfy their requirements from a repertoire of 2–3 brands as shown in Table 3. Sole loyalty—sticking to one brand—is not common. Therefore, this market looks 'normal' in the context of the empirical generalisation from other markets. The marketing implication is that these brands compete for a share of their buyer's requirements—there are not 'our customers' and 'their customers'. Rather, there are simply customers who sometimes buy *this* brand and sometimes buy certain *other* brands. There is scope for forgetting, since the consumer's requirements are shared around multiple brands. The marketing task therefore would appear to be mostly about reminding these intermittent or occasional brand buyers to buy it and ensuring it is easy to purchase.

DOUBLE JEOPARDY

Weight of purchase and share of category requirements are the most common metrics used to identify brand loyalty, and related double jeopardy effects. Unfortunately, due to this study being based on a survey, such data were not available. Therefore I used two other measures of brand loyalty. The first is the proportion of solely loyal buyers. This is a standard behavioural loyalty metric. If one brand has 80 per cent of its customers who *only* buy it and a competitor has only 40 per cent of its

customers who *only* buy it, then obviously the former brands enjoys more loyalty.

The second measure is an index of loyalty based on brand repertoire size. I do not use repertoire size directly (as reported in Table 3) because it is potentially confusing as a loyalty indicator. The reason is that a smaller repertoire size indicates *more* loyalty and a larger repertoire size indicates *less* loyalty. This is the opposite to the normal way of presenting the double jeopardy effect whereby a smaller loyalty metric indicates lower loyalty.

Therefore, to avoid confusion I derived a loyalty measure from the repertoire sizes whereby a larger number for that measure indicates more loyalty. The derived measure is the average repertoire size for all brands divided by the repertoire size for a particular brand. For example, for West End, which is the largest brand, this derived measure is 1.3 (eg 2.8/2.2), which means that the average repertoire across all the brands is 1.3 times what it is for West End. For Tooheys, the smallest brand, it is 0.9. A larger number denotes more brand loyalty.

The double jeopardy pattern is very clear from both measures as seen in Table 4. The brands are arranged in descending order of size. The proportion of 'solely loyals'—those who reported they only bought that brand—declines steadily in-line with the size of the brand (correlation = 0.97). Toohey's reportedly has 5 per cent of its buyers that are solely loyal to it, which is slightly higher than what VB and Crown enjoy—but this is undistinguishable from random variation. Likewise, the derived loyalty measure based on repertoire size declines in-line with brand size. The correlation between brand size and this loyalty measure is 0.93.

Table 3 Brand repertoires

Brand	% of sample who buy this beer	Average repertoire of beer brands among the buyers of this beer
West End	58	2.2
Coopers	47	2.4
Carlton	20	2.8
VB	14	3.0
Crown	12	3.4
Tooheys	10	3.0
Average		**2.8**

On average, these beer drinkers had a repertoire of 2.8 brands.

DUPLICATION OF PURCHASE LAW

For this analysis I show the results for only the largest five brands, because the cell counts for the smaller brands become too unreliable due to random sampling variation. The purchase duplication table is ordered by size in both rows and columns.

Table 4 Loyalty statistics

Brand	% of sample who buy this beer	Proportion of this brand's buyers who are 'solely loyal' to it	Derived brand loyalty measure: average repertoire size for all brands is *x* times this figure:
West End	58	26	1.3
Coopers	47	17	1.2
Carlton	20	10	1.0
VB	14	3	0.9
Crown	12	3	0.8
Tooheys	10	5	0.9

Loyalty declines as the size of the brand declines.

The overall duplication of purchase pattern is readily seen from reading along the 'average' row. The average proportion of *other* brands' buyers who also buy the brand in each column steadily declines from left to right—in-line with the descending order of brand size in the columns. On average, 50 per cent of any brand's buyers *also* bought West End, 43 per cent *also* bought Coopers and so forth. Relatively fewer buyers of any particular brand also bought Crown—because Crown is a small brand. On average then, the major competitor for any brand is the largest brand, and the minor competitor for any particular brand is the smallest brand in the market. The correlation between penetration and average duplication is 0.99 as in Table 5.

While the overall duplication of purchase law holds, there is some variation within any particular column that may indicate some 'partitioning' or sub-markets between particular brands. For example, Crown buyers are more likely to buy VB than we would expect given the overall popularity of VB among all buyers. On average, 17 per cent of any brand's buyers also buy VB, but Crown buyers are more likely to do so, with a purchase duplication between this pair of brands of 27 per cent. It is worth noting that Crown, VB and Carlton are all owned by Fosters group. This may mean they share commonalities in distribution, which could explain the partitioning. The important point is, however, that the overall pattern holds, as it has done in many other markets. Once the overall pattern is evident then such deviations become meaningful.

ANOTHER IMPLICATION: BRAND SEGMENTATION, OR THE LACK OF IT

Another marketing implication flows from the finding about repertoire buying and the duplication of purchase pattern. This relates to segmentation among competing brands.

It is widely accepted that brands that are designed to offer different benefits, or constructed to have distinct brand positions, must appeal to different groups of buyers. Indeed, this is logically predicated on the textbook process for brand positioning. For example, according to Kotler and Keller, brand positioning involves (1) identifying groups with different needs, for example, market segments; (2) choosing which ones to target and (3) constructing distinctive brand positions that are attrac-

Table 5 Duplication of Purchase

Brand	Penetration: % buying this brand	Duplication: % who also buys…				
		West End	Coopers	Carlton	VB	Crown
West End	58		35	18	14	13
Coopers	47	43		17	10	11
Carlton	20	52	40		19	15
VB	14	58	33	26		23
Crown	12	60	44	25	27	
Average		**50**	**43**	**23**	**17**	**16**

The average proportion of a brand's customers who also buy the other brand, declines in-line with the size of the other brand.

tive to the target segment (Kotler and Keller,[6] Chapter 10). Aaker *et al.*[46] state

> 'segmentation … involves the decision to aim at a certain group of customers… positioning … involves a decision to stress certain aspects of our brand … the objective must be to have segmentation and positioning strategies that fit together: a brand must be positioned in a way that is maximally effective in attracting the desired target segment' (p. 131).

According to this logic, such brands *must* therefore appeal to different segments as their entire construction is based around accomplishing that end. Recent evidence, however, casts doubt on this popular belief—users of competing brands have generally similar demographic or psychographic profiles.[47–50] Likewise, in a recent study variations in brand performance across demographic groups were overwhelmingly attributable to overall brand size—with brand segmentation a noticeable but not large effect.[51]

What is the explanation for this lack of difference among brand users? At least part of the answer is that if the buyers of one brand also buy other brands, then the users of each cannot be *too* different because they are often the same people ! This is exactly what is shown in the present analysis. The buyers of West End beer are largely the *same* people who also buy Coopers beer, Carlton and so forth. The same people cannot be in different segments unless we redefine segments as 'the brand the person bought last time'—which is hardly useful. Therefore the industry belief cited earlier, that somehow VB pitches to a different group of beer drinkers to Carlton appears to be incorrect. The two brands compete for purchases with each other about as much as they should, after allowing for the size of the respective brands.

LIMITATIONS OF THE STUDY

This study has some obvious limitations that much be acknowledged. The data are based on claimed behaviour in a personal interview, rather than recording of purchases as per a consumer panel. Therefore data on the number of times the respondents bought or consumed each brand were not available. The sample size used was 620, which is quite large, but an even larger sample may have lowered the extent of random error in the figures for individual brands. This would have made it easier to clarify whether the higher than expected purchase duplications between Crown and VB is actually market partitioning, rather than being indistinguishable from random sampling fluctuation. Finally, there is a limitation stemming from the sample composition, namely patrons at Australian Rules football matches. Sponsorship rights may mean that certain beers brands enjoy exclusive distribution at these venues. If this is the case, some patrons at the football venues may purchase a brand that they normally would not consume. The study did, however, identify quite a clear pattern in terms of purchase duplications and the double jeopardy effect, and the results are consistent with prior published research that did not share such limitations. Replication with a broader sample would be desirable.

SUMMARY

In summary, this study investigated whether some well-established and important empirical generalisations about buyer behaviour and brand performance would apply in a quite different market context. They did. This adds to our confidence that repertoire buying, double jeopardy and the duplication of purchase law are to be expected in most markets. Therefore,

they are facts that marketers should know about as they have important implications for marketing practice. Hopefully, marketing textbooks may in-time begin to incorporate these basic findings.

The findings reported here reinforce the notion that generally, marketing people should consider their customers or buyers as occasional buyers—there are not customers who are 'ours' and others who are 'theirs'. This means that competition is very robust and direct—the buyers of one brand are not particularly attached to it, they simply buy it some of the time. This may sound depressing—what is one to do? The answer is: marketing activity to remind buyers about the brand, and make the brand easier to buy is paramount. This may sound simple, but there is huge scope to learn how to do this more efficiently and effectively than competitors.

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