Shopper Value:
A Framework and Examination of the Impact of Importance, Shopping Context and Shopping Social Situation

A Dissertation

Presented in Partial Fulfillment for the

Doctor of Philosophy Degree

The University of Tennessee, Knoxville

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May 2012

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DEDICATION

This manuscript is dedicated to my wife Anne, and our children Kathleen and Ryan. I am blessed with steadfast love and support from Anne, without which I would not have been had the opportunity to pursue this new direction in life. My children, a source of great pleasure and pride, have provided me with support through many relocations and too many career changes, including this transition to academia. Without the love, patience, and understanding of my family, this degree, and this manuscript would not have been possible.

I also dedicate this to this work to my father, who years ago, through example must have instilled the need to pursue a terminal degree. This research was in part inspired by his dissertation and in particular by the following passage:

> "Unfortunately, for the inclusive, categorical thinker, mankind's knowledge of the world around him constantly expanded. It became increasingly difficult to transmit knowledge in toto. Rather, each discipline or branch of knowledge tended to become sacrosanct and to view knowledge from its own theoretical position rather than as an inclusive whole." (H. J. Jones, 1968, p. 1)

ACKNOWLEDGEMENTS

A dissertation is not completed without the support of many hands and minds, and for that assistance I offer great thanks. I am grateful to the University of Tennessee for the opportunity to pursue this degree. I thank all of those who helped in making this opportunity possible, particularly the faculty and staff of the Retail, Hospitality, and Tourism Management Department. I have been given a great gift through your example of scholarship and student care. I wish to thank Dr. Ann Fairhurst for taking the time to work with me in pursuing this degree and for chairing my committee. I thank Dr. Youn Kyung Kim, for her support and drive to have me complete my first research project and publication. I thank Dr. Rodney Runyan for his contribution to my committee and his valuable support and guidance, which helped me, become a better scholar and instructor. I thank Dr. Wanda Costen who provided me many insights both as a member of my committee and as an academic.

This research was performed in conjunction with the Shopper Marketing Forum, where I have many to thank. I thank Dr. Daniel Flint, who agreed to co-chair my committee and pushing me to always search for connections in the analysis and deeper insight. I thank Dr. Sarah Gardial, who graciously agreed to serve on my committee, providing me great insights about her research which served as a foundation for this study. I wish to thank Dr. Dave Schumann, who although not a member of my committee, gave so freely of his time, which is in short supply, to support me and this research. I thank Dr. Ernie Cadotte, for his insight and patience in guiding the development of the new scale items developed for this research.

I offer special thanks to my fellow students whom I had the pleasure to work with, including; Vertica Bhardwaj, Jeffrey Campbell, Jewon Lyu, Yun Hee Kim, Nathan Line, Robert Daniell, Wanmo Koo, Christopher Sneed, Melanie Doss and Hye June Park. Thank you for assistance and friendship, I hope that we have the opportunity to work together in the future.

I would like to thank my siblings and their families, Larry, Marianne, and Amy. Together, we have been through a lot these past three years. Your support of my family has been instrumental in making this achievement possible. I look forward to our being able to gather in celebration. To my mom and dad, I thank you for a lifetime of support; I wish your lifetime would have lasted to see this completed. To my many friends, thank your support particularly these last three years has been invaluable, as has been your willingness to find time to share a laugh, a meal and of course, wine.

I also want to thank the Retail, Hospitality, and Tourism Management Department, for the Ida A. Anders scholarship, travel support and research support, particularly $2000.00 for this dissertation. I also want to thank Bellomy Research for their generous offer to develop the on-line survey instrument and gather the data for this dissertation. In particular, I wish to thank John Sessions for seeing value in this research leading to his spontaneous offer of support, and Courtney Dooley and her team who together developed the on-line survey instrument and hosted the data gathering.

ABSTRACT

This dissertation is exploratory, examining a little studied part of retail, the shopper. Shoppers are defined as: actively engaged in the pursuit of a target purchase driven by a specific need requiring a solution. The objectives of this research are to clarify the differences between consumers and shoppers, justifying the need for further study. This research also seeks to develop a values based framework of shopper behavior in order to facilitate future research.

An extensive review of the literature provides a foundation for the differences between shoppers and consumers. The theory of reasoned action provides the foundation for the shopper value framework. The literature provides theoretical support for a framework which supports empirical measurement of shopper behavior identifying and measuring their differences from consumers and demonstrating their unique engagement with the retail economy.

In order to examine the shopper, two studies are undertaken. The first seeks to add to the understanding of what shopper's value through qualitative research using value laddering. The second study employs an on-line survey with an experimental design using salty snacks purchasing as the context. The second study tests the shopper value framework for applicability in studying the shopper, and the salience of several proposed moderators.

The research demonstrates that shoppers utilize a limited number of values which support their decision making process. These values come in two forms primary and secondary. Their interaction is explored in some detail. The study also finds that the

shopper value framework can be an effective tool in describing and demonstrating how occasion specific factors, along with importance and social factors, can combine to influence shopper outcomes.

Together both studies provide a foundation for understanding the world of the shopper. This foundation generates several managerial and academic implications, limitations, as well as many areas for future research of the shopper.

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CHAPTER 1 – INTRODUCTION TO DISSERTATION

Shopper Marketing and the Need to Explore Shoppers Vis-à-Vis Consumers

Shopper marketing, a rapidly growing field within marketing, has profound implications for the effective integration of demand and supply chains for suppliers, and retailers. Shopper marketing has been described as a way of engaging the shopper during the shopper experience (Fast Company, 2008). One simple definition expresses the activities of shopper marketing as: "designed to drive growth by improving the shopping experience for the shopper" (Fast Company, 2008). A more formal definition which is perhaps more generally accepted in industry is:

> "The use of strategic insight into the shopper mindset to drive effective marketing and merchandising activity in a specific store environment. Key elements of effective shopper marketing include: an organizational culture that embraces shopper insights as a key component of the marketing strategy; strong collaboration between retailer and brand marketer, in which both sides work toward mutually beneficial objectives; the development of programs that, in addition to driving sales, can build brand equity for both product and retailer by engaging shoppers in relevant ways." (Schober, Bold, & Breen, 2011, p. 40)

From these definitions it can be said that shopper marketing is focused on gaining insights from the shopper and utilizing those insights to help both the brand and retailer co-create value with the shopper. What is less clear from either definition is where this takes place. Initially shopper marketing was believed to be solely an in-store activity (J. Neff, 2007). However, the application of shopper marketing is beginning to expand and now encompasses activities not necessarily bound by the in-store environment (Neff,

2011). This expansion may cause further blurring of the distinction between "traditional" marketing and shopper marketing.

This relatively new marketing format has developed at a pace which far exceeds that of either industry or academia. The dearth of research associated with this marketing phenomenon has resulted in a lack of clarity and definition in both academic and industry literature. Definitional discrepancies confound communication among practitioners as well as academics regarding many topics such as: where shopper marketing is employed (e.g., in-store or out), consumers versus shoppers, data points used in shopper analysis, and marketing metrics for determining success. Similarly there is no framework outlining how the shopper processes and approaches the shopping experience. Therefore, understanding the shopper's acknowledgment of a shopping need, preparation for, and assessment of, value from the shopping experience, also lack clarity. Defining this marketing phenomenon is therefore essential. Shoppers, similar to consumers, are interested in value maximization (Woodruff & Gardial, 1996). However, similar to those areas already mentioned in need of research, shopper value has also not been addressed.

The literature is not silent on the concepts of value, shoppers, or shopping. A review of the extant literature reveals a significant number of articles addressing shoppers and value. (Note: these articles will be covered in Chapter 2) However, the research generally focuses on price orientation or value to the firm. Out of more than 150 articles reviewed, only eight articles discuss shopper or shopper value. Of those eight articles, seven examine value from a hedonic and/or utilitarian perspective, but take two distinct approaches. Of the seven hedonic and utilitarian article five leverage an early scale (Babin, Darden, & Griffin, 1994), comprised of fifteen hedonic and utilitarian personal

shopping value items (Babin, et al., 1994; Babin, Gonzalez, & Watts, 2007; Eroglu, Machleit, & Barr, 2005; Jones, Reynolds, & Arnold, 2006; Overby & Lee, 2006). The two remaining articles with a hedonic and utilitarian orientation, examine the experiential elements which a shopper may value (Michon, Yu, Smith, & Chebat, 2008; Stoel, Wickliffe, & Lee, 2004). The final article of the eight found in the literature examines the role of income for the shopper (Paridon, Carraher, Carraher, & Entreprises, 2006). While these articles address a shopper's orientation toward shopping, or an element of shopping which they may value, shopper value is not addressed. The type of investigation undertaken by these authors is consistent with the majority of the literature, representing shoppers through a consumer lens.

The consumer paradigm unfortunately, assumes a largely static typology of preferences. These preferences toward product, brand, retailer, store location, and channel are assessed by consumers in the abstract (Bliss, 1960). Yet the fixed perspective these preferences have relative to value, allows for the isolation of shoppers into distinct categories for use in shopper segmentation (Myers & Nicosia, 1968). The shopper is much more fluid and interactive with regard to value than the consumer. Dynamism during the shopping experience significantly impacts the ability of some consumer research to explain shopper behavior.

Within the literature, two seminal articles define important distinctions between shoppers and consumers (Jolson & Spath, 1973; Westbrook & Black, 1985). These articles provide insight into what makes a shopper unique and point to areas of further research needed to adequately address them. One specific area identified is the shopper's relationship to merchandise and retailers (Jolson & Spath, 1973). A second area focuses

on shopper motivation and situation (Westbrook & Black, 1985). Unfortunately, these gaps remain largely unanswered in the extant literature. The current research seeks to address these gaps. Additionally, this investigation provides a process framework through which the shopper engages the shopping experience and the generation of shopper value.

Not only is this research necessary to address gaps acknowledged in the literature, but implicit in the shopper marketing paradigm is the concept of value assessment by the shopper. Co-creation of value with the shopper is part of the "win, win, win", shopper marketing goal and is achieved through brands and retailers recognizing her needs, and delivering enhancements through product or information which helps address those needs. Yet, estimation of value and value added remain elusive as the elements which contribute to shopper value have yet to be defined.

How can marketers (brands or retailers), benchmark marketing performance absent of a definition of what elements impact shopper value? This research, leveraging the existing academic and trade literature, provides a conceptual definition of shopper value. Further, a framework for shopper value assessment is developed and its components described. The development of a shopper value framework (SVF) draws heavily from sociology, psychology, social psychology, consumer behavior, and marketing disciplines to describe the various constructs and how value is assessed by the shopper.

Research Objectives and Questions

The primary objective of this dissertation addresses the development of a framework to investigate how shoppers create value. The shopper experiences a dynamic world as she moves down her path to purchase. Elements in her environment (e.g., physical, emotional, social, temporal, financial, and risk) compete for, and/or conflict with, her targeted solution during the shopping experience. How the shopper balances these changing demands, sometimes instantaneously, is critical to understanding how the shopper assesses value. The SVF is designed to enhance the understanding of value for the shopper through both qualitative and quantitative research methods.

The research questions and objectives for this study develop insight into shoppers' evaluation of the dynamic elements in the environment during the pursuit of value.

Research objectives:

1. *Identify differences between shopper and consumer value for:*
    a. *Brand*
    b. *Product*
    c. *Retailer*
    d. *Store location*
2. *Identify differential importance weighting points during the shopping process for:*
    a. *Brand*
    b. *Retailer*
3. *The impact of perceived temporal constraints on shopper value.*
4. *The impact of perceived financial constraints shopper value.*
5. *The impact of purchase recipient perception on shopper value.*
6. *The impact of social shopping situation factors (e.g., alone, with another supportive, or with another not supportive) on shopper evaluation of:*
    a. *Retailers*
    b. *Brands*
7. *The impact of perceived need occasion importance on shopper value.*

The research questions are designed to address these objectives as follows:

Research objective one examines the following research questions:

1. *Does shopper occasion perception create a value frame for the shopping experience?*
2. *Does the occasion perception value frame, identify for the shopper what she will value, in shopper purchase assessment?*
3. *Is the shopper value for an outcome different from what a consumer would value?*
4. *Will those differences be reflected in:*
    a. *Brand?*
    b. *Product?*
    c. *Retailer?*
    d. *Store Location?*
    e. *All or none of the above*

Research objective two examines the following research questions:

1. *Are there points within the SVF where brands are more important to the shopper than the retailer?*
2. *Are there points within the SVF where retailers are more important to the shopper than brands?*
3. *Are those points important enough to alter what the shopper values from the shopping experience?*
4. *Are those points important enough to alter shopper behavior?*

Research objective three examines the following research questions:

1. *Do genuine temporal constraints alter what the shopper values during the shopping experience?*
2. *Do perceived temporal constraints alter what the shopper values during the shopping experience?*
3. *Is there a difference for the shopper in outcome between genuine or perceived temporal constraints?*

Research objective four examines the following research questions:

1. *Do genuine financial constraints alter what the shopper values during the shopping experience?*
2. *Do perceived financial constraints alter what the shopper values during the shopping experience?*
3. *Is there a difference for the shopper in outcome between genuine or perceived financial constraints?*

Research objective five examines the following research questions:

1. *Does the recipient of a purchase impact value for the shopper?*
2. *How does the shopper's perception of the purchase recipient impact what she values?*

Research objective six examines the following research questions:

1. *How does the alone social shopping situation factor impact what the shopper values?*
2. *How does the, with another supportive, social shopping situation factor impact what the shopper values?*
3. *How does the, with another not-supportive, social shopping situation factor impact what the shopper values?*
4. *Do social shopping situation factors impact what the shopper values for;*
    a. *Retailers?*
    b. *Store Locations?*
    c. *Brands?*
    d. *Products?*

Research objective seven examines the following research questions:

1. *Does the shopper's perception of the importance of the need occasion impact value for the shopping experience?*
2. *Does the shopper's perception of the importance of the need occasion impact how she values:*
    a. *Retailers?*
    b. *Brands?*

Contribution of this Research

This research extends the body of shopper value knowledge. More than two decades ago two sets of authors, Jolson and Spath (1973) and Westbrook and Black (1985), called for a further investigation into the shopper. Since that time shopper marketing has become the fastest growing marketing activity outpacing all other marketing formats (e.g., print, television, radio) (Neff, 2007). Shopper marketing budgets with brand marketing firms particularly consumer product goods (CPG) continue to grow in real dollars, even as their overall marketing budgets are being reduced (J. Neff, 2007).

The rise of shopper marketing as a valuable marketing format provides further impetus to the need for investigating the shopper.

Foundational to the effective development, implementation and assessment of shopper marketing is the understanding of shopper value. The co-creation of value between the shopper, retailer and brands during the shopping experience is intimately associated with the "win, win, win", shopper marketing strategy (Deloitte Consulting LLP, 2008, p. 17). However there are no defined metrics which measure change in shopper value associated with shopper marketing in order to gauge performance against this strategy. Investigating the SVF and how shoppers move through the process in relation to products, brands, retailers and store locations form the core of this research. In addition, descriptions and definitions are provided to aid in the development of a common understanding between industry and academia.

Future research, using consistent nomenclature, will reduce expenditures on duplicated efforts which arise from imprecise language. This clarification is a result of a conceptual framework describing the processes the shopper employs to assess value. The SVF represents a hierarchical process model, identifying the stages the shopper progresses through, leading to the outcome of shopper value. Also identified are co-creation of value touch points for both retailers and brand practitioners for use in measuring marketing effectiveness with the shopper.

The contributions of this study should help brand marketers, through their relationship with the retailer, interact with the shopper through the point of purchase. The processes which the shopper employs to manage her dynamic environment, allow brand

marketers the opportunity to continually influence shopper purchase outcomes in the retail store environment. Brands which can identify how the shopper may have arrived at her initial targeted purchase solution can also identify how to best present a superior offering suited to her needs. Brands can tailor messages to the shopper toward, maintaining her present solution, providing alternative solutions, and/or link to complementary product(s). Any of these may further increase the assessment of value by the shopper. Engagement with the shopper in the co-creation of value stands to have a significant impact not only for the shopper, but for the performance of brands, products, retailers, store location, and channel as well.

For retailers, the economic downturn coupled with a saturated retail environment (Lord, 2000) helps to further fuel the need to study the shopper in-depth. Because of the economic pressure with the meteoric rise in resources being expended on shopper marketing (J. Neff, 2007), the need to understand the shopper and her assessment of value becomes a paramount goal. This need for understanding impacts not only academia, but retailers and brand marketers as well. Retailers need to understand the processes shoppers employ toward, store and channel selection, as well as brand and product selection. It is through these attributes shoppers attempting to maximize value.

Economic pressures, depress sales, which drives retailers to increase margins. One of the chief methods to achieve margin enhancement by retailers is to move more inventory dollars into private label (store brand) products, at the expense of branded products (Ailawadi, Pauwels, & Steenkamp, 2008). This shift in inventory dollars results in increased intra-category competition for margin, space and sales between private label

and branded products (Ailawadi & Harlam, 2004). The loss in branded product availability may also represent a decrease in value to the shopper. However, marketers of branded products that can develop meaningful programs, based on measurable co-creation of value with shoppers, can develop superior positioning strategies for their brand. The superior positioning can apply not only to shoppers but to retailers as well. Alternatively, retailers who can develop meaningful co-creation of shopper value programs with their branded product marketers, even with a reduced branded presence in their stores, can gain a similarly superior position with branded marketers. Together, brands and retailers can help generate an environment which encourages value creation. This helps move them into an even more favorable position with shoppers, resulting in mutual performance enhancement.

As brands are one of the integral elements in the shopper purchase solution, understanding the impact of brand change and availability to shoppers is important. This research will contribute to our knowledge of branding and what role it may have in impacting shopper outcomes. The goal of brands as it is with shoppers is to maximize value while minimizing expenditures. Therefore, the one solution for the retailer to minimize shopper search expense is private label (Ailawadi, et al., 2008). Search expense can be further minimized through loyalty to a single-brand retailer. The shopper who is single-brand loyal has an extremely truncated information search and solution set, benefiting both shopper and retailer (Jones & Kim, 2011). These shoppers represent an enormous benefit for the retailer. This type of loyalty to a private label while beneficial to the retailer is hardly beneficial to marketers of brands. However, shopper brand loyalty

either to a private label or a branded product, forces competitors to develop effective co-creation of value offerings. However, the costs for the competitor to develop, generate awareness of, and gain a positive shopper assessment of that offer, is prohibitive (Jones & Kim, 2011). As a result, this research examines the interplay of product, brand, retailer, store location and channel as manipulated by the shopper, through the SVF, in pursuit of value optimization. Included in that examination is an investigation into how shopping social situation, recipient and occasion importance impact shopper value. Finally, this research investigates the impact of retail trip type (e.g., convenience, quick fill-in) on the assessment of value by the shopper.

Learning how shoppers engage the shopping experience for a specific purchase solution is important to the establishment of shopper value. Retailers and brands that offer product, store and channel solutions, optimized to co-create value with shoppers, will benefit from increased performance. Solutions that can be consistently offered, successfully replicating the shopper's movement through the SVF, can return predictive results which may develop loyalty toward the retailer, store location, channel, product and/or brand. The result of that replication is truncated shopper information searches and increased performance for brands and retailers.

Dissertation Organization

The dissertation is organized into five chapters. Chapter one serves to introduce and frame the research, focusing on the need, objectives, and research questions. Chapter one concludes with a review of the anticipated contributions to the body of knowledge resulting from the research. Chapter two reviews the literature which is relevant to this

investigation. A theoretical foundation supporting the development of the SVF is examined as well as the development of the individual constructs. Methodological approaches for studying the framework are proposed and supported. Chapter three further details the methodological approaches undertaken to answer the questions posed in this research. Chapter four is comprised of two studies: the first reports the findings and analysis from the qualitative investigation, and the second reports the findings and analysis from the quantitative investigation. The first study reports interpretations of shopper's descriptions of their experiences across a variety of occasions. The second study details the results of an on-line survey employing an experimental design comprised of eight differing scenarios. The findings detail the impact that perceived occasion importance, perceived recipient importance, and shopping social situation have on shopper outcomes. The study serves as an indication of value change which occurs from consumer estimation to shopper assessment. Chapter five summarizes and integrates the findings from both studies, describing limitations and providing opportunities for future research. The chapter concludes with a review of the contribution to the literature.

CHAPTER 2 – LITERATURE REVIEW

The exploratory nature of the investigation into shopper value predicates a minor deviation from the traditional review of the literature. By convention, a literature review would begin with an explication of the theoretical framework which supports the study. However, the importance of framing for the reader the unique conceptualization of shoppers and value used in this study, requires that these two variables be discussed in advance. Through their review, it is hoped that the reader will develop a shopper orientation toward the discussion of the theoretical framework.

The literature reviewed for this study provides an integrated examination of the shopper and how they may assess value. Through the synthesis of this literature, gaps are identified which form the opportunity for this and future research. For organizational clarity, Chapter Two is divided into two sections. The first section begins with a review of the shopper and value literature, as previously stated, followed by the theoretical framework; theory of reasoned action. The theoretical framework provides support for the processes shoppers may undertake in value creation. These processes in this research are represented by the shopper value framework (SVF). The constructs which comprise the (SVF) are introduced and discussed through theory of reasoned action. The review of the literature contained in section one is therefore organized in the following manner:

1. Shopper
2. Value
3. Theoretical Framework
    a. Shopper value framework constructs

The second section of Chapter Two begins with a brief overview of the SVF, followed by the qualitative and quantitative research agenda. Due to the exploratory

nature of the investigation into shopper value, a mixed-method approach is proposed. A qualitative methodological approach is proposed as an appropriate first step in the investigation. A quantitative methodological approach is proposed to commence at the conclusion of the qualitative study. As such, the mixed-method approach employed for this study follows a sequential design. Following the introduction to this methodology, a presentation of the quantitative model will be offered and a review of the research design provided. The second section concludes with a discussion of the rationale behind the need for a mixed-method approach to the research. With that description of the organization for Chapter Two, we begin with the discussion of the shopper.

SECTION ONE: SHOPPER, VALUE AND THEORETICAL FRAMEWORK

SHOPPER

Literature, describing "shoppers", appear in several disciplines but is most thoroughly addressed in the consumer behavior literature. It is important for the purposes of this research to focus not on where shoppers and consumers are similar, but instead to focus on where shoppers have been shown to be different. While shoppers and consumers do share commonalities, it is the differences that are at the core of the SVF.

Shoppers, from the earliest literature entry, are discussed through a consumer behavior paradigm. This approach, rooted in the marketing priority of segmentation, results in shoppers being assigned to specific and fixed categories or archetypes (Kim, Jung, Suh, & Hwang, 2006). Shoppers in the literature first appear more than a half century ago in sociology where the first shopper typology is established. This typology is

comprised of four orientations; economic, personalizing, ethical and apathetic (Stone, 1954). Synonymous with the consumer, the shoppers' orientation is fixed as they are assigned to one of the four categories. The marketing literature will continue in this vein, but will introduce the first difference between shoppers and consumers. Shoppers, unlike consumers, are actively engaged in the pursuit of a purchase (Bliss, 1960). (The development of the shopper through the marketing literature can be seen below in Table 1.) Consumers' product thoughts are more generalized, as they have no defined purchase need requiring a resolution (Bliss, 1960)

The shopper develops further in the marketing literature, through the addition of elements which are identified as having a significant impact on their decision making process. One such element is the retailer. Shoppers, different from consumers, include retailers as an integral component during decision making (Jolson & Spath, 1973). Further, the retail environment is also identified as salient in decision making (Jolson & Spath, 1973). From this research, six metrics are identified as essential in shoppers making a retail selection; value perception, specialization level, merchandise quality, merchandise availability, sales service, and store location (Jolson & Spath, 1973). Through this research, retailers were examined to ascertain whether or not they were aware of, and/or make accommodations for, the shopper decision metrics. Unfortunately, the results indicated that retailers were either unaware or failed to consider these key shopper retailer selection metrics used by the shopper (Jolson & Spath, 1973).

Table 1 *Shopper Development in the Literature*

Journal	Citation	Finding
American Journal of Sociology	Stone (1954)	Typology of Shoppers: • Economic • Personalization • Ethical • Apathetic
Journal of Marketing	Bliss (1960)	Shoppers are different from consumers by virtue of their current pursuit of a purchase
Journal of Marketing	Herrmann & Beik (1968)	Shopper motivation to search for product outside their local trade area: • Search for increased selection • Catalog is different than out of town • Out of town charge accounts increase out of town purchases • Out of town purchases increase with income
Journal of Marketing Research	Darden & Reynolds (1971)	Further validation of the Stone typologies, suggesting that it may be possible to segment across these typologies
Harvard Business Review	Cunningham & Cunningham (1973)	Three forms of active in-home shoppers, all high status and/or income: • Convenience • Novelty • Adventure

Table 1 *Continued*

Journal	Citation	Finding
Journal of Retailing	Jolson & Spath (1973)	Examines retailers as an important element to shoppers. Does not investigate retail brand as being salient and indicates that retailers are not aware of trying to meet shopper needs. Six elements critical to shoppers: • Value perception • Specialization level • Merchandise quality • Merchandise availability • Sales service • Store location
Journal of Marketing	Boone, Kurtz, Johnson, & Bonno (1974)	Cross-Cultural study (Stone typology) Hispanic and Anglo shoppers notes changes to the segments and introduces an intermediate segment
Journal of Marketing	Gillette (1976)	Introduces four key elements in research on shoppers which severely reduce generalizability: • Empirical studies are few and small-scale • Definitions of variables are not standardized • Measurement of purchasing and shopping behavior is limited • Sampling frames are restricted
Journal of Retailing	Berkowitz, Walton & Walker (1979)	Shopper increasingly balancing convenience with pricing as shopper cost of search increases
Journal of Advertising Research	Mills (1983)	Identifies six social identification as typology for shoppers: • Leaders • Followers • Socialites • Neutrals • Independents • Rejectors

Table 1 *Continued*

Journal	Citation	Finding
Journal of Small Business Management	Barnes (1984)	Psychographics and demographics vary across shopper segments. The combination of the elements can produce reliable segment profiles.
Journal of Retailing	Westbrook & Black (1985)	Identify motivation as important to shoppers instead of fixed typology of shopper. Need research into occasion as it relates to motivation. Generate seven shopper motivations: • anticipated purchase utility • economic shopping role • negotiation of price concessions • product choice maximization • affiliation with in-groups • power in the marketplace • sensory stimulation of the marketplace
Industry Definition	Shopper Marketing Glossary (2010)	Definition: "A consumer who is actively involved in considering products to purchase"

The identification of retailers as important in shopper decision making represents a leap forward in shopper understanding. However, at this stage of shopper development in the literature, large gaps associated with retailer selection attributes including in-store environment, store location, staff, product assortment, trade area composition, and retailer brand, in shopper decision making still exist. Any and/or all of these unstudied elements in the retail enviroment can have a significant impact on the shopping experience. As such, they can also have a significant impact on shopper value.

At this stage of shopper development, only two attributes associated with merchandise have been identified; quality and avaliability (Jolson & Spath, 1973). This

leaves unexplored merchandise attributes such as, brand, size, assortment, packaging, and location, as well as a series of pricing elements. These elements also impact how the shopper will assess value during the shopping experience.

Shopper literature at this point has identified two elements which are distinct from consumers; their active engagement in a purchase pursuit and the inclusion of external elements (such as the retailer) in their decision processes. Product, while often important to consumers, is central to shoppers, as it is the target of their active purchase pursuit. Therefore, shoppers require a clear definition of their product need in order to act. Metrics, while important, are by themselves insufficient to understand shopper decision making. What is essential is to identify which factor(s) is/are most important to the shopper in her decision making (Jolson & Spath, 1973). This point is central to shopper marketing and shopper value creation.

The marketing literature seizes on the retail gaps, and explores in-store and other retail sales channel environments related to shoppers. In this research stream there are examinations of direct, catalog, and telephone sales channels (Boone, Kurtz, Johnson, & Bonno, 1974; Cunningham & Cunningham, 1973; Gillett, 1976). Today, the investigation also includes television, online, and mobile, and will continue to expand with changes in technology (Eastlick & Liu, 1997; Eroglu, Machleit, & Davis, 2001; Kumar & Lim, 2008). This research expands on, or debates, the various factors to include in the development of more comprehensive shopper typologies. Variables focused on for much of this research are; demographics, psychographics, socio-economic, geographraphical, and lifestyle as factors (Barnes, 1984; Berkowitz, Walton, & Walker Jr, 1979; Bliss,

1960; Boone, et al., 1974; Crask & Reynolds, 1978; Cunningham & Cunningham, 1973; Darden & Reynolds, 1971; Gillett, 1976; Herrmann & Beik, 1968; Jolson & Spath, 1973; Mills, 1983; Stone, 1954).

In the mid 1980's however, there is a distinct shift in the shopper literature through the introduction of another element foundational in the understanding of how shoppers assesses value. The shift represents a move away from the fixed archetypes of the consumer paradigm, and toward a situationally oriented typology of motivation (Westbrook & Black, 1985). This typology focuses on shopper motivation employed during the pursuit of a purchase need resolution. The authors describe seven of these motivations; anticipated purchase utility, economic shopping role, negotiation of price concessions, product choice maximization, affiliation with in-groups, power in the marketplace, and sensory stimulation of the marketplace (Westbrook & Black, 1985). The shopper focused on a purchase need requires some motivation in order to pursue a resolution. Therefore, shoppers don't respond in a fixed manner to purchase need occasions. Instead, she is fluid in her motivation application based on the assessment she has made of the shopping need occasion. In fact she may apply any single, or combination of motivations which best suit her understanding of the purchase need she is charged with resolving. The dynamism implied in this motivational approach to shoppers indicates at least two other areas for research. First, is an examination into the degree of variation which may occur in motivation, and second, the impact of temporal changes on motivation. In both cases, the impact of the shopping context (e.g., convenience, stock-

up, etc.) should also be examined (Westbrook & Black, 1985). Westbrook and Black (1985) are particularly on point to shopper value and shopper marketing as a whole.

The literature has now identified shoppers are distinct from consumers in five significant ways; active engagement in a purchase pursuit, retailer is important, product is much more clearly defined, shoppers are situationally motivated, and shopper motivation toward a purchase solution can change with each purchase occasion. Despite these advancements which point to understanding shoppers as dynamic in the marketplace, the marketing literature continues to focus on fixed shopper typologies. The continued focus on categorization at the expense of motivation results in shopping context, temporal impact and motivation variation of shoppers being largely unstudied. The archetye approach to shoppers does not allow for changes in motivation introduced by the specifics of each purchase need occasion. The inability to account for changes in shopper decision making introduced through motivation creates the opportunity for significant error in the prediction of marketplace behavior and purchase solution outcomes. Further still, failure to acknowledge motivation removes a significant attribute through which the shopper will assess value from their shopping experience.

During this time not only is the academic literature studying the shopper, but the trade literature is as well. Through the trade and other literature we see the shopper being examined differently than from the consumer perspective. Through the trade literature we can find a simple definition of the shopper:

> "A consumer who is actively involved in considering products to purchase" (Schober, et al., 2011).

Similar to the Bliss (1960) definition, this shows shoppers to be different from consumers through active involvement in the purchase solution. Shopper involvement in the industry literature is often described as the "path to purchase" (Schober, et al., 2011). The path to purchase begins when the shopper becomes aware of a product need and culminates at the purchase (Schober, et al., 2011). Industry, similar to academic literature, also describes the "path" as an active pursuit. However, industry diverges from academic literature on purchase need recognition, which is central to understanding shopper behavior and shopper value.

Shoppers active engagement in the resolution of a purchase need, represents from a cultural perspective, engagement in a consumption "occasion" (McCracken, 1986). Recognized purchase needs may be driven by specific occasions, or driven by the cultural meaning assigned to the purchase target. Furthermore, cultural meaning is under constant pressure and is frequently changing and evolving. This requires a shopper to maintain a high level of specificity in her target choice set. It also makes it incumbent on the shopper to be vigilant in their pursuit of purchase target information. The high level of change, both situational and cultural, which exists in the shopper's environment, can lead to rapid information obsolescence. This obsolescence could render an identified purchase solution unsuitable for any number of reasons, including changes in cultural understanding (McCracken, 1986). The lack of fit between what the current optimum would proscribe, and a sub-optimum choice due to obsolete information, results in reduced value for the

shopping experience. The need for the shopper to be pro-active and responsive in their pursuit of a purchase need, particularly from a cultural perspective, highlights yet another gap which remains to be addressed in the literature.

The cultural gap stems largely from the segmentation approach to the shopper. The literature assumes that cultural meaning toward a product is just as fixed as the consumer typology. However, meaning associated with both the product and the occasion are constantly being altered through changes in the cultural environment (McCracken, 1986). Therefore, the instability of the cultural landscape in which the shopper acts, predicates that dynamism holds a preeminent position in the SVF. Shoppers must be able to adjust to each occasion, as well as cultural changes, which may impact their situation and/or the product. Therefore, the shopper is required to evaluate attributes related to all aspects of the occasion, for benefits and sacrifices, which are subject to constant change (Woodruff & Gardial, 1996). Evaluation of the need occasion has a tremendous impact on shopper assessment of the relative importance of attributes, benefits, and sacrifices. How she weights or changes importance weight assessment can cause changes in her behavior and what she values. The changes can impact her selection of a retailer, store location, shopping context, social shopping situation, brand, and/or product. The identification of this level of change which exists along the path to purchase further underscores the need for a dynamic model of the shopper.

The consumer literature, as reviewed, provides a solid foundation for examining the shopper. However, it also serves to highlight that the differences between shoppers and consumers can be quite stark. Shoppers require a more flexible and dynamic model

to allow for their interaction with a complex environment during the shopping experience. Consumers, who are more abstract in their product consideration, may be more suited to a static typology. Change, which is inevitable for the shopper, is in part driven by her identification of a purchase requirement which is tied to a specific need occasion. Need occasions have a formative function for the shopper. They are central to the determination of her purchase solution choice set. Need occasions help frame for the shopper important attributes, benefits and sacrifices, in relation to her values, needs, wants and desires, which will be used in the purchase solution evaluation (Woodruff & Gardial, 1996). Therefore, through the literature, shoppers can now be seen as different from consumers in five significant ways: (1) actively engaged in a purchase solution, (2) external elements (e.g., retailer) are important, (3) clear product definition is required, (4) purchases are situationally motivated, and (5) responsive to a highly dynamic environment. The result of these differences is that shoppers will assess value according to their understanding of each unique purchase need occasion. Additionally, the assessment of value is far from being static, and is subject to change throughout the shopping experience. Therefore, at a definitional level for the purposes of this research, we can understand that:

> Shoppers are actively engaged in the pursuit of a target brand(s)/product(s) from a retailer(s) through target store location(s)/channel(s) which is driven by a specific need occasion requiring a specific product solution.

The resolution of the identified product need is essential to the shopper and is critical to her assessment of value.

VALUE

Value exists within the literature in a variety of conceptualizations. Foundationally, value, values and valuation all stem from axiology, first mentioned in the literature in 1902 (Hart, 1971). Axiology is the study of those things which enhance the enjoyment of life (Hart, 1971). This is achieved through knowledge relevant to value, on a number of levels; good vs. bad, right vs. wrong, young vs. old, attractive vs. unattractive, to name a few (Hart, 1971). The importance of knowledge to axiology becomes more fully described in valuation, which is a process of knowing, doing and valuing (Lewis, 1946). Individual's experience or empirical knowledge provides them a foundation on which to make informed evaluations about outcomes. These knowledge based evaluations are not speculative, therefore outcomes can be tested against the known information (Lewis, 1946). As a result, knowing predicates thoughtful action, providing the individual the ability to value outcomes (Lewis, 1946). This understanding of knowing, acting and valuing of outcomes is directly related to the SVF. The consumer value literature follows from this stream of research. Through the years the consumer value literature has flowed largely through three main themes: customer lifetime value, customer values, valuing. A review of these streams is provided, followed by a discussion of value as it relates to the shopper. (A progression of this literature can be found in Table 2).

Customer Lifetime Value

One examination of value within the literature is as a utility function. This function is most often expressed as the expected value the customer is anticipated to bring to the firm over the duration of the customer/firm relationship. This concept is

introduced initially as customer equity (Blattberg & Deighton, 1996). The operationalization of customer equity requires firms to appraise the potential future profit from the customer, and then subtract the cost of their acquisition and retention. These estimations are made over some specified time frame which represent the estimated duration of the customer/firm relationship. Central to the estimates is the assumption that customers once acquired can be retained (Blattberg & Deighton, 1996). Lifetime value is an important business tool, projecting through customers an estimate of the firm's business. This utility model continues to be relevant to industry and serves as the foundation for many current academic investigations (Kumar, et al., 2010; W. Lee, Lin, & Lee, 2010; Shin & Sudhir, 2010; Zhang, Dixit, & Friedmann, 2010).

However the SVF differs significantly from this value conceptualization. First, the shopper receives value from the shopping experience. This is not an estimation of what a retailer or brand may receive from a continued relationship with the shopper. Second, shopper value is not a financial estimate, but a perceived level of value generated from the shopping experience. Third, shopper value is assessed according to a purchase outcome. This is a present assessment not an accumulated value achieved from a lifetime of shopping experiences. Furthermore, the shopper value perspective would argue that purchases are situationally driven. The utility function as expressed lacks sufficient specificity to be predictive, as it contains no understanding of the purchase need, which launched the shopper down the path to purchase from the firm. Unless the firm can ascertain the number of times the shopper will be engaged in similar occasions over the duration of the shopper/firm relationship, it is impossible to predict future value. While this literature stream adds value and is beneficial from a firm perspective it offers little

Table 2 *Value Development in the Literature*

Author	Construct	Measurement
Lapie (1902)	Axiology	Right vs. Wrong
Lewis (1946)	Knowledge and Valuation	Cognitive-evaluative process
Locke (1967, 1969)	Value Percept Disparity	Emotional response to a cognitive-evaluative process
Rokeach (1973)	Rokeach Value Survey	18 instrumental and 18 terminal values
Kahle (1983)	List of Values	Values relative to the role an individual plays during their lifetime
Monroe (1990)	Customer Value	Benefits minus the price
Anderson, Jain, & Chintagunta (1992)	Customer Value	Benefits minus the sum of costs and missed opportunity
Spreng and Oshavsky (1993)	Congruency Model of Satisfaction	Choice through perceived attribute and consequences
Dabholkar (1994)	Expectancy Value Theory	Value as perceived in relation to expected return
Gale & Wood (1994)	Customer Value	Benefits minus the sum of costs and missed opportunity
Herche (1994)	Multi-Item List of Values	Expanded LOV from 9 to 44
Butz Jr. & Goodstein, (1996)	Customer Value	Benefits minus the sum of costs and missed opportunity
Woodruff and Gardial (1996)	Customer Value	Perception of the outcome; consequences
Zeithamel (1997)	Consumer value	Benefits minus the sum of costs and missed opportunity
Anderson, Narus, & van Rossum (2006)	Customer Value	Benefits minus the sum of costs and missed opportunity
Flint (2006)	Valuing	Evaluation of possible solutions and their benefits in relation to other solutions

assistance to shopper value. The second in this stream of literature, representing values, offers more support.

Values

The values literature stream follows two main conceptualizations. While different in application, both streams hold a similar perspective on function. Both examine values as an intrinsic set of beliefs or perspectives which relate to desired end states. These end states contribute to decisions individuals make regarding how they will conduct their life. These decisions, from a consumer perspective, relate to purchases and conduct in the marketplace (Bearden & Netemeyer, 1999). Perhaps the most well known values conceptualization describes two forms of values, represented as either instrumental or terminal (Rokeach, 1973). The Rokeach Value Survey (RVS) establishes a finite hierarchical list of eighteen (for both instrumental and terminal) values describing desired end states of the individual. For RVS, values are central to the consumer and are considered to be stable over time. Stability has made the RVS perspective particularly popular in consumer research. Stability complements segmentation which is focused on identifying fixed typologies. Values in the RVS are described as personally and socially desirable. RVS values form the foundation for standards through which judgments, choices, evaluations, and actions are taken by individuals. Further, these values serve as criteria used to form attitudes, rationalizations, arguments and assignments of causality (Rokeach, 1973).

Shoppers establish value through an evaluation of known information. Values are considered important sources of known information for shoppers (Lewis, 1946). Shoppers apply values pertinent to a given occasion as one element used toward the

evaluation of potential purchase solutions. Through her shopping experiences, the shopper will assess value.

The second important conceptualization is the list of values (LOV) (Kahle, 1983). The LOV conceptualization examines consumer's values throughout their life. In particular, LOV focuses on how values may alter in relevance as the individual fulfills various roles. Therefore, the LOV conceptualization is particularly relevant to the development of the SVF. Through the need occasion, the shopper will frame a role for herself, which she deems appropriate, based on her perception of the situation. As an example, the shopper may perceive their role as any of the following; spouse, parent, employee, employer, child, host, guest or for self (Kahle, 1983). Through her role, values are engaged which aid in identifying optimum purchase solutions. The role perceived for the occasion also frames motivation for completing the purchase task. Therefore, values engaged by occasion are foundational to understanding the shopper. The LOV is comprised of nine values; sense of belonging, excitement, fun and enjoyment in life, warm relationships with others, self-fulfillment, being well-respected, a sense of accomplishment, security, and self-respect (Bearden & Netemeyer, 1999). This model has been further expanded to the multi-item measures of value (MILOV) (Herche & Institute, 1994). The MILOV scale measures forty four items which more broadly reflect the LOV (Bearden & Netemeyer, 1999).

Values make an important contributor to a shopper's evaluation process. Values shape shopper orientations toward a purchase solution. The introduction of a values assignment by role allows for dynamic engagement by the shopper through her evaluation of the need occasion. Values, while contributing to our understanding of the

shopper, do not represent shopper value, which is the outcome of the SVF. Not only can values be assigned dynamically through role assessment, but value itself can be dynamic which is a process called valuing.

Valuing

Value, as a measure used to assess a benefit, includes both a static form value, and an active form, valuing. The static form is closely related to the RVS as previously discussed and is considered resistant to change (Rokeach, 1973). The static value approach generally examines value as one of six approaches: trade-off; means-end chain; core values; functional, social, and relational benefits (coupled with monetary and non-monetary sacrifices); experiential and hedonic; and comparative (Flint, 2006). Consumer value describes the confluence of the user's values, products/services, and the use situation, as seen in Figure 1.

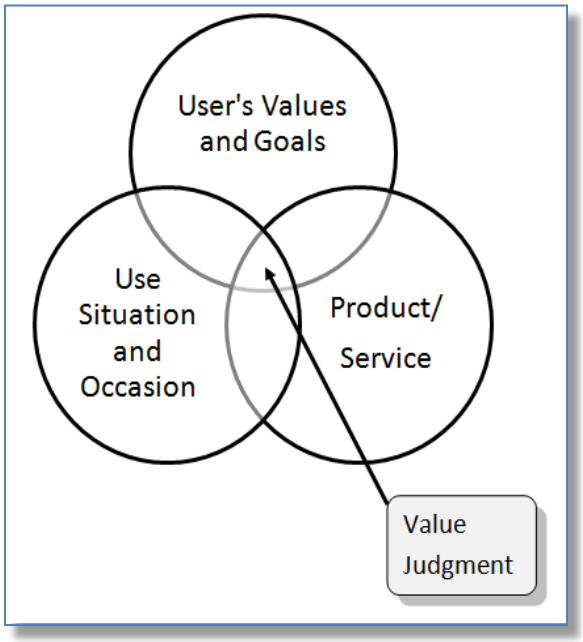


Figure 1. Consumer Value Judgment. Adapted from *Know Your Customer: New Approaches to Understanding Customer Value and Satisfaction* (p.60) Woodruff and Gardial, 1975, Malden, Massachusetts: Blackwell Publishers. Copywright, 1996.

Consumer value has been posited to exist only through consumption and has no relationship with the purchase (Smith, 1999). This is at odds not only with the concept of shopper value but at odds with much of the consumer value literature (Flint, Larsson, Gammelgaard, & Mentzer, 2005; Leclerc & Schmitt, 1999; Schau, Muñiz, & Arnould, 2009; Schmitt, Skiera, & Van den Bulte, 2011; Schouten, McAlexander, & Koenig, 2007; D. Sirdeshmukh, J. Singh, & B. Sabol, 2002; Slater & Narver, 2000; Ulaga & Eggert, 2006; Woodruff & Gardial, 1996). Consumer value can be impacted by delays associated with the purchase experience (Leclerc & Schmitt, 1999), aesthetics, and the environment (Richins, 1999). Value for the consumer is interactive and subject to influence throughout its generation, therefore it is appropriate to describe value from the dynamic standpoint of valuing, for both the consumer and the shopper.

Valuing is the process of evaluating beneficial attributes in relation to each other (Flint, 2006). Under the valuing paradigm, value perception is evolutionary. Value is subject to a variety of internal and external influences, which continually alter value perception (Flint, 2006). Valuing is not only a positive estimation because changes can also occur which have a negative impact that results in de-valuing. Changes in the shopper's environment, cultural meaning, occasion, and more can all negatively impact attribute evaluation resulting in de-valuing. Valuing establishes a process through which shoppers have the ability to re-value the benefit of certain attributes, which allows for the necessary change management to adapt to a dynamic environment as expressed by McCracken (1986).

Valuing may begin abstractly with the recognition of a product, service, or occasion. This is particularly relevant to the consumer. Because consumers are not tied to

a specific purchase need, their evaluations are more generalized. Value will alter as definition through the need occasion becomes more clear. Value will continue to alter as the actual process to purchase begins. In fact, value can alter throughout the process from purchase, to post-purchase, to consumption, and post-consumption reflection (Flint, 2006). Valuing therefore can be seen as a cycle for the consumer and the shopper which is modeled in Figure 2.

Valuing therefore is an iterative and evolving process. The shopper actively evaluates benefits throughout her shopping experience. The iterative nature of valuing offers tremendous benefits not only for the shopper but for retailers, and brand marketers. Every iteration in value change along the path to purchase is an inflection point at which retailers and marketers can offer superior value solutions to the shopper. Increased attention to the shopper's purchase need assists in identifying solutions which result in the co-creation of greater value. As such, valuing is instrumental in the development of value for the shopper.

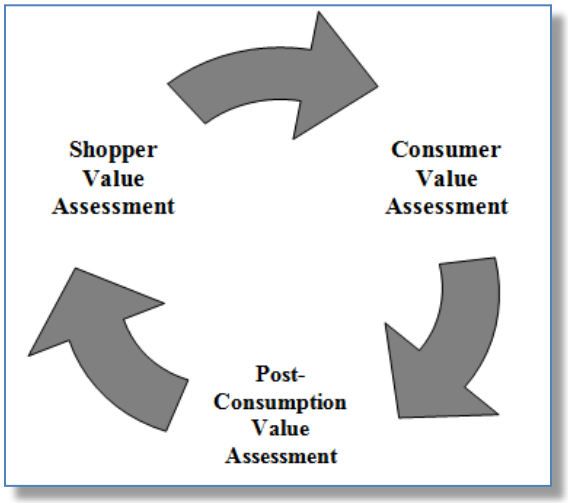


Figure 2. Shopper – Consumer Valuing Lifecycle

The shopper begins the valuing process with the recognition of a purchase need and continues re-valuing through attribute benefit assessment of product, brand, retailer, store locations, and channel. These assessments can occur with individual benefits or in combination through the point of purchase. Valuing, during the shopping experience, can be influenced through a variety of events; interactions with other shoppers or employees (brands and retailers), in-store environment, and the interplay of the product/brand with the store/retailer. Product/store interplay is a result of displays, stock levels, sampling, pricing, couponing, assortment, facings, positioning, as well as competitive and complementary product assortment (Simonson & Winer, 1992). For the purposes of the SVF, evaluations are made only to the point of purchase. All valuing which occurs beyond the point of purchase would create an assessment of value by the consumer. The SVF being both hierarchical and dynamic indicates that re-valuation may force movement both up and down the hierarchy, further reinforcing the dynamic orientation of the shopper.

The information on shoppers and value was provided to develop a "shopper value" orientation to examine the theoretical framework that follows. The framework used as the foundation for this research is theory of reasoned action (Fishbein & Ajzen, 1975).

THEORETICAL FRAMEWORK: THEORY OF REASONED ACTION

The theory of reasoned action (TRA) provides a method to examine relationships between beliefs, attitudes, and intentions leading to behavior (Fishbein & Ajzen, 2010). This theory was developed, in part, as a method to validate attitudes as predictors of

behavior. Prior to its development, many studies had failed to establish the relationship as significant (Montano, Kasprzyk, & Taplin, 1997). TRA demonstrates that the relationship between attitude and behavior engagement is significant, provided the measurement is consistently toward the behavior (Montano, et al., 1997).

The TRA model, as originally conceptualized, begins with a set of beliefs regarding a behavior in two distinct forms; beliefs and normative beliefs (Fishbein & Ajzen, 1975). Beliefs toward a behavior held by an individual inform her attitudes toward that same behavior. Normative beliefs regarding a particular behavior inform the subjective norms she believes are associated with the behavior. Both attitudes and subjective norms impact the individual's intention toward engagement in the target behavior. The TRA model concludes with an assessment of a behavioral outcome which ranges dimensionally between definitely not engage to definitely engage in the behavior (Fishbein & Ajzen, 1975). Each element within the model is subject to the individual's assessment of importance relative toward her decision to engage in the behavior. A representation of the TRA model can be seen in Figure 3.

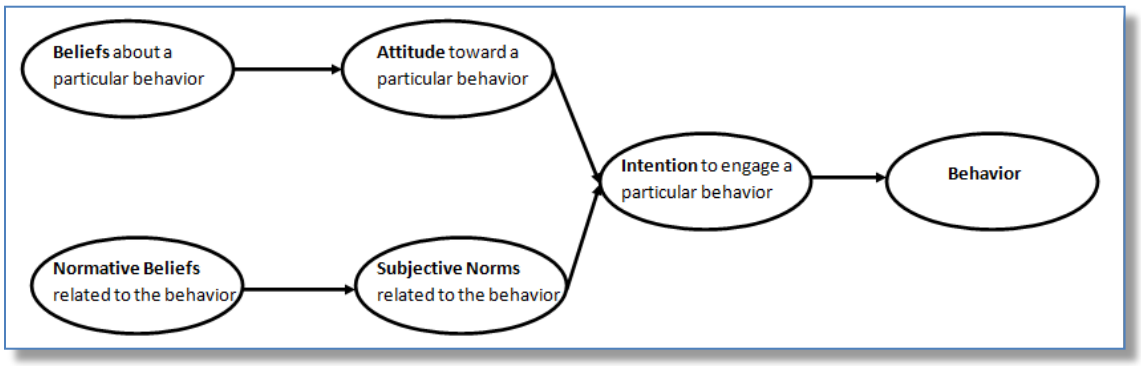


Figure 3. Theory of Reasoned Action Model. Adapted from *Belief, attitude, intention and behavior: An introduction to theory and research* (p. 16), Fishbein and Ajzen, 1975, Reading, Massachusetts: Addison-Wesley Publishing Company. Copyright 1975.

The balance of the discussion of TRA focuses on providing a detailed outline for each of the model's constructs. Once each of the TRA constructs has been introduced, the relevant SVF construct will be introduced and supported. Therefore the remainder of the section on the theoretical framework will be as follows:

1. Beliefs
    a. Need Occasion
2. Attitudes
    b. Shopper Occasion Perception
3. Intentions
    c. Shopper Targeting
4. Behavior
    d. Shopper Experiencing

BELIEFS

Beliefs for the shopper are specific and impact the assessments the individual will make for each purchase need occasion (Fishbein & Ajzen, 1980). Beliefs are inwardly oriented and are reflective of individual personal assessment (Fishbein & Ajzen, 1975). Beliefs must be tied to a specific behavioral objective. For the purposes of this research, beliefs are tied to the purchase of the identified need item(s); salty snacks. Therefore, shopper beliefs for this research must correspond to their beliefs toward the purchase of salty snacks, not simply their beliefs about the snacks themselves.

Beliefs also need to be specific enough so that their inclusion in the decision process will have an impact on attitudes (Fishbein & Ajzen, 1980). In addition to specificity, the individual's beliefs should carry with them a level of significance so that they are determinant in the decision process to engage in the behavior. One method of examining beliefs impact on attitudes is to begin with an examination of the level of self-

monitoring engaged in by the individual (Ajzen, Timko, & White, 1982). The correlation between beliefs and attitudes is stronger for individuals who engage in low self-monitoring (Ajzen, et al., 1982). Therefore, low self-monitoring would indicate a stronger set of beliefs that are internally oriented which allows for the stronger correlation to attitude. Beliefs which rely heavily on outward confirmation (normative) exhibit a weaker correlation with attitude as they require more constant updating to continue to validate the accuracy of the belief through non-internal sources (Ajzen, et al., 1982).

In the example of this research, beliefs regarding the purchase of a generically specified "salty snack" may lack the requisite specificity to elicit a strong correlation with attitudes. In that case the weak beliefs would render their impact on attitudes difficult to assess. Beliefs carrying the necessary significance would need to be tied to a much more specific target. In this case, the beliefs should at least be oriented toward a salty snack type (e.g., potato chips, pretzels), or better still, specific to a particular brand (e.g., Lays, Better Made), and still further to a particular product (e.g., Lays Bar B Que). On a continuum, specificity related to salty snacks could be represented as shown in Table 3. Furthermore, beliefs should also be tied to low levels of self-monitoring which would indicate a high level of belief strength (Ajzen, et al., 1982).

Beliefs in this research are tied to an attitude which leads to the intention to purchase a particular salty snack. Even if the beliefs are tied to a specific salty snack category (e.g., chip) the shopper may have significantly different beliefs related to the purchase of each of the chips listed in Table 3 (Fishbein & Ajzen, 1980).

Table 3 *Salty Snack Specificity Continuum Example*

Least Specific		**To**			**Most Specific (By inclusion)**	
Salty Snack	Chip	Potato	Waffle Cut	Original (Salt)	Lays®	16 oz. Bag
		Tortilla	Blue Corn	Spicy Black Bean	Guiltless Gourmet®	16 oz. Bag
		Vegetable	Mixed Vegetable	Sea Salt	Terra Chip®	5 oz. Bag

Furthermore, there are an abundance of brands, styles (e.g., wavy, waffle, baked, fried), component ingredients (e.g., corn, potato, multi-grain) and flavors within the chip category which alone may carry a different belief set for the shopper. Additionally, the shopper will carry a unique belief set toward the purchase of each member of the salty snack category, which in addition to potato chips, consists of; tortilla chips, snack nuts and seeds (including corn nuts), popcorn, pretzels, extruded cheese snacks, corn snacks, and other (Prepared Food Network, 2010).

Beliefs can also impact attitudes through a positive or negative valence toward the behavior (Fazio, Powell, & Herr, 1983). The salience with which the individual has assigned the belief determines the strength of the valance toward the behavior. In addition to beliefs toward the behavior, TRA specifies that there are also normative orientations toward the behavior.

Normative beliefs are outwardly oriented. Normative beliefs are a shopper's assessment of others expectations for engaging in a behavior (Fishbein & Ajzen, 1980). The others which the shopper references for this assessment are perceived to be important

to the individual and their opinion is relevant for the occasion (Fishbein & Ajzen, 1980). The shopper assesses the likelihood that those others would, or would not; support her engagement in the behavior as well as how she engages in the behavior. Through their perceived importance, the normative referents positive or negative assessment can influence the individual's attitude and intentions for engaging in the behavior. In this study, the assessment would relate to the support or lack thereof toward the purchasing of salty snacks.

Within the framework of this study, the shopper's assessment of the purchase need and the behavior required to facilitate its solution is multi-faceted. The shopper will be required to have both beliefs and normative beliefs toward the purchase behavior beyond just the purchase item alone. She will need to understand first, the reason for which the purchase need has arisen. Each occasion will carry its own belief set for the shopper. She will need to address her beliefs about retailers, store locations and/or channels where her purchase solution will come from. Therefore she may also engage beliefs she holds relative to where the purchase will come from, which may include: economic issues, personalization level, store size, employee attention, and supporting local ownership (Stone, 1954). Further, she may also need to assess her beliefs toward her value orientation such as price tier, full price, coupon usage, and sale shopping (Lichtenstein, Netemeyer, & Burton, 1990). Beyond these, she may need to address her beliefs regarding preparatory activity (or the lack thereof) for her shopping experience including; newspaper search, list making, internet search, opinion solicitation, or spontaneous purchasing (Thomas & Garland, 2004). These facets help to define the behavior which will need to be engaged by the shopper in order to procure the purchase

target. In combination, these facets begin the process for the shopper of addressing her appraisal of the need occasion which defines the purchase need for the shopper. Within the SVF, beliefs lie at the initiation point which is need occasion, which will be discussed in detail below.

NEED OCCASION

Need occasion begins the path to purchase the shopper will follow in pursuit of value. Need occasion in the SVF performs a similar function as beliefs in TRA. Within this construct, the shopper identifies the specifics associated with the occasion which is the source of the purchase need. Through her examination, she will begin to frame her beliefs toward the occasion and the product/service purchase need which it requires. Through need occasion the shopper assembles beliefs toward attributes for evaluation in relation to the shopping solution, the product solution, temporal boundaries and social requirements. This level of detail is necessary in order to frame the desired outcome for the shopper which is the purchase behavior through which she will assess value for the shopping experience.

Need occasion, at the initiation point of the SVF, highlights the divergence between shopper and consumer paradigms. It also demonstrates the need to increase our understanding of shoppers and shopper value through further research. Need occasion is not a necessary component for the consumer. Consumer beliefs exist in a general fashion informed by experience; prior personal, others, and/or the media (Gardial, Clemons, Woodruff, Schumann, & Burns, 1994). Need occasion is unique to shoppers because they require specific beliefs in order to properly frame a satisfactory purchase solution, which

will suffice for the given occasion. Therefore, it is important to define the elements which comprise need occasion. Through the definition of need occasion, an exploration of its impact within the SVF and value for the shopper will be discussed. See Table 4 for a recap of occasion development in the literature.

Need occasion is situationally driven and therefore must contain temporal and spatial elements (R. W. Belk, 1975). Need occasion requires further definition through the inclusion of social factors which serve to proscribe particular patterns of behavior (Barker, 1968). Increasing the level of definition of need occasion benefits the shopper through belief clarity, allowing for stronger attitude impact. However, the drive for specificity can result in the gathering of so many beliefs, exceeding what's required for successful implementation of the need occasion, which results in stagnation and confusion (R. W. Belk, 1975). Elements related to beliefs which are appropriate and important to capture within need occasion are; time, space and situational factors (R. W. Belk, 1975).

Occasion is recognized in consumer behavior research, however the tendency is to define it as noise which needs to be filtered out of the data (R. W. Belk, 1975). This too is contrary to the shopper paradigm. Occasion is central to understanding shopper beliefs regarding her behavior which she will employ to affect her attitudes. In fact, not only is occasion not considered noise, it is one of the determinant elements Jolson and Spath (1973) identified as requiring further research. In order to better understand the role of need occasion in framing beliefs, we will need to examine the specifics associated with occasion.

Table 4 *Occasion Development in the Literature*

Author	Measure	Findings
Lewin (1936)	Situation	Environmental cues, internal beliefs and social interaction impact situation assessment
Barker (1968)	Occasion	Behavioral setting includes temporal, spatial and behavioral elements
Belk (1975)	Situations	Comprised of Spatial and Temporal elements
Jolson and Spath (1973)	Occasion	For shoppers, is essential to measure for occasion noise
Lutz and Kakkar (1975)	Situation	Situation elements are definable and measurable
Cohen (1980)	Temporal Elements	Time perception can lead to stresses which alter the evaluation of an occasion
Thaler (1980)	Occasion	Current evaluation based on future projection
Holbrook and Hirschman (1982)	Task	Tasks can be either hedonic/affective or cognitive
Gardner (1985)	Environment	Environmental factors impact consumer behavior and choice in decision making
Westbrook and Black (1985)	Situation	Situation is important to shoppers
McCracken (1986)	Occasion	Social construction constantly evolving

Table 4 *Continued*

Author	Measure	Findings
Stayman and Deshpande (1989)	Situation	Occasion impacted by antecedent states
Goldstein (1990)	Importance	Perceived importance will affect the interest and motivation to fulfill role
Sanbonmatsu, Shavitt, & Sherman (1991)	Personal relevance	Impacts how consequences are evaluated
Gardial, Clemons, Woodruff, Schumann, & Burns (1994)	Occasion	Not important to consumers experience important
Harvey (1999)	Temporal Elements	Compression can reduce the ability to function
Wooten (2000)	Importance	Occasion and recipient can have conflicting levels of perceived importance

Need occasion with the SVF is multi-faceted, comprised of five sub-constructs reflecting unique aspects of the occasion for the shopper: occasion assessment, perceived product and/or service need, perceived importance of occasion and recipient (consumer), and occasion urgency. Each of these constructs is brought into the occasion through the shopper's consumer lens as she has yet to develop a full sense of the occasion. As she develops a full understanding of the occasion and the purchase need, she will develop her shopper orientation which is the next construct in the SVF. The balance of the need occasion discussion will focus on the theoretical support for each construct.

Occasion Assessment

Occasion assessment reflects specific elements related to time and space (R. W. Belk, 1975). Time and space dimensions for the shopper relate to; antecedent states, physical surroundings, and temporal dimensions (R. W. Belk, 1975). The assessment of each occasion brings with it the shoppers beliefs toward each of the dimensions which will be described in detail below.

Antecedent States

Antecedent states reflect the scripting details associated with the shopper's current situation. The shopper's present situation has a significant impact on her assessment of the future occasion (Stayman & Deshpande, 1989). Therefore, the shopper's antecedent state reflects her current situation and her perception of the future occasion. Further, antecedent states are not fixed but are also situationally bound (Stayman & Deshpande, 1989). The antecedent state may also be impacted by changes within the current circumstances such as interpersonal interactions both direct and technologically aided, marketing materials and communications, and cultural definitions (Gardner, 1985; Stayman & Deshpande, 1989). Beyond these, further alterations may occur through environmental cues, or any internal constructions of the individual (Lewin, 1936). Any of these changes can influence shopper beliefs toward behavior, product, and retail dimensions (Gardner, 1985; Stayman & Deshpande, 1989).

Antecedent states contain elements which are observable and measurable making them suitable and beneficial for further study (Belk, 1974; Lutz & Kakkar, 1975). Measurement is particularly important not only to shopper value but to shopper marketing, which needs metrics to gauge the impact of marketing programs. One

measurable area which can impact antecedent states is the physical surroundings (environment).

Physical surroundings

Physical surroundings encompass the shopper's current environment. The shopper acknowledges the need occasion in the present, and that physical environment will impact her beliefs toward the future purchase need. Studies of environmental factors and their impact on consumer choice and decision making are legion leaving no doubt as to their importance for the shopper (Baker, Grewal, & Levy, 1992; Baker, Grewal, & Parasuraman, 1994; Belk, 1974; Bellizzi & Hite, 1992; Kim, 2001; Kim, Sullivan, & Forney, 2007; Mathwick, Malhotra, & Rigdon, 2002; Moschis & Churchill Jr, 1978; Nord & Peter, 1980; Wansink, 2004). A comprehensive review of the consumer and the environment can be found in "Mood States and Consumer Behavior: A Critical Review" (Gardner, 1985).

The shopper acknowledges that both the occasion and product need are for some future time period. To prepare, the shopper will project herself into the future occasion to generate definition to her belief set (R. Thaler, 1980). Beliefs are weighted toward benefits, so that evaluations of potential purchase solutions focus on maximizing shopper value. This is different from the consumer literature where weighting assessments are based on estimates of costs and benefits (R. Thaler, 1980). Beliefs toward future benefits generally, are biased toward the present environment. Beliefs about future costs tend to be biased toward opportunity (D. Gilbert, M. Gill, & T. Wilson, 2002; G Loewenstein, 1996, 2000; George Loewenstein & Adler, 1995; G

Loewenstein & Frederick, 1997; G Loewenstein, O'Donoghue, & Rabin, 2003; G Loewenstein & Schkade, 2003; R. Thaler, 1980). Beliefs, while initially biased toward the present, will be moderated as the occasion and the shopping experience draws closer, and new information is acquired (D. Gilbert, et al., 2002). The adaptive nature of shopper beliefs toward the purchase need offers tremendous opportunity. Those brands and retailers, which together create environments the shopper assesses positively, benefit from the current shopping experience, and her positive beliefs will influence future shopping experiences as well.

Temporal Dimensions

Temporal dimensions reflect multiple streams in the SVF such as: time required to complete or terminate a current social script; time between the current script conclusion and next social script beginning; proximity to the next need occasion; time required to purchase the product need; and time required to gather missing information. Uncontrollable and unpredictable events such as perceived and/or actual time compression introduce stressors into the shopping experience which lead to sub-optimized value. Value reduction associated with stressors impact both the current situation as well as the future need occasion (S. Cohen, 1980). Stressors can combine, as an example, time and space compression (resulting from current and future need competition) which results in further sub-optimization of value. The pressures of compression resolution seriously reduce the shopper's ability to function in the current situation. This stems from the beliefs being employed by the shopper in the present may be in conflict with the beliefs she needs to employ toward the future need (Harvey, 1999). Further, unanticipated changes can compound the conflict impact for both present

and future need occasions (Harvey, 1999). Temporal conflicts add stress into the shopping situation, generating responses which could damage relationships for the shopper in the present, future situations, and in the extreme, both (Harvey, 1999). Relationship damage represents another value loss for the shopper.

Stressors

Stressors also impact shopper motivation to engage the shopping experience required to satisfy the purchase need. Abundant space and time may have a positive impact on shopper value through stress reduction from decreased temporal compression. However, abundance may also lead to overestimation of time by the shopper, delaying response thus creating time compression resulting in reduced shopper value (Harvey, 1999). Conflicts in beliefs caused by temporal conditions reduce task definition, which for the shopper, is the purchase of the perceived product and/or service need (Harvey, 1999).

Social Dimensions

In order to maximize value, shoppers must exploit all relevant dimensions associated with the shopping experience to their benefit. In addition to those which have already been discussed, is the social dimension (R. W. Belk, 1975; Chung, Chen, Chaboya, O'Toole, & Atabakhsh, 2005). Social dimensions have a significant impact on the beliefs the shopper has toward the product purchase. Social dimensions, similar to antecedent states, require the shopper to examine both the present and the future setting (R. W. Belk, 1975). The current social setting reflects the shopper gaining awareness of the new need occasion, while the future reflects the shopper's estimation of the new need occasion. As discussed for the physical dimension, the present and its positive or negative

valance biases the assessment of the future in the same direction (Gilbert, Gill, & Wilson, 2002) .

The social setting, both current and future, includes a variety of different participant scenarios from shopping alone, with others or some combination of the two. If both social settings, current and future is alone, the shopper maintains complete control leading to strong positive beliefs (Gilbert, et al., 2002) . However, alone social settings are also valenced (Long & Averill, 2003). Positive alone settings are self-reinforcing, while negative alone settings are often associated with loneliness and despair (Long & Averill, 2003). Positive alone settings encourage the shopper to not only meet but exceed her goals, thus increasing shopper value (Gardner, 1985). However, negative alone can cause delay or a failure to complete the shopping experience having a negative effect on shopper value (Gardner, 1985).

Perceived Product and/or Service Need

How the shopper perceives her task reflects the clarity and confidence she has in her ability to complete the task. Clarity reflects her already identified beliefs, while confidence reflects her ability to obtain the necessary information to form beliefs toward the purchase need solution. Task definition in the literature is described alternately as a cognitive, or hedonic/affective process (Holbrook & Hirschman, 1982). The cognitive model reflects the shopper seeking out relevant information for belief selection. Information once found is evaluated to assess the value of that information toward finding a task solution (Holbrook & Hirschman, 1982). This process is reflective of the normative beliefs which are outwardly oriented. The shopper lacking the necessary

information seeks other information from trusted sources to aid in her assessment of the shopping need.

The affective or experiential model of task definition is less about seeking and more about avoiding. The affective model reflects risk avoidance, providing self-gratification and pleasure for the shopper (Holbrook & Hirschman, 1982). However, rooted in the TRA model, the SVF would argue against only one orientation and would argue for inclusion of both conceptualizations. Shoppers bring certain pre-dispositions toward cognitive or affective processing to the shopping experience (Holbrook & Hirschman, 1982). The product need itself may come with a certain perceived hedonic or cognitive weight of its own. Thus, it is not only possible, but probable that the shopper will utilize both methods in pursuit of the occasion product need (Holbrook & Hirschman, 1982). The level of effort expended by the shopper along either the cognitive or hedonic orientation may relate to the importance the shopper has ascribed to the need occasion.

Perceived Importance: Occasion and Recipient

Perceived importance in SVF has two orientations; occasion and recipient. Perceived importance for both occasion and recipient affects the shopper's interest in the development of the beliefs necessary to impact her attitude and intentions toward fulfilling her purchase (Goldstein, 1990). How she assesses occasion and recipient attributes determines importance. Importance assessment can vary for the shopper, even if the attributes remain the same, based on how the attributes relate to her goals in the present and/or the future (Goldstein, 1990).

While occasion and recipient are two distinctly different constructs, importance leverages the same affect within the need occasion framework. Importance adds anxiety into an occasion for the shopper, which increases proportionately with the level of perceived importance (Schlenker & Leary, 1982). Perceived importance of the occasion increases anxiety related to the social environment and the shopper's impression management (Wooten, 2000). Therefore, occasion importance can be seen to impact her normative beliefs. Perceived importance of the recipient increases anxiety related to interpersonal relationships (Wooten, 2000). This would manifest itself primarily in the shopper's assessment of beliefs. Perceptions of importance for recipient and occasion can conflict within the model (Wooten, 2000). The shopper may perceive the occasion as unimportant yet the recipient as important (and vice versa), adding tension between social and interpersonal relationship goals (Wooten, 2000).

Importance is the interaction between the individual, her environment, and the individual weight assigned to elements, which vary by circumstance (Lewin, 1936). Occasion elements are not viewed equally, which impacts beliefs differentially. It is through this variation that shopper behavior and value are individualized. Perceived importance in consumer behavior has been widely researched (Ajzen, Brown, & Rosenthal, 1996; Celsi & Olson, 1988; Chaiken, 1980; Liberman & Chaiken, 1996; Petty & Cacioppo, 1984; Petty, Cacioppo, & Goldman, 1981; Petty, Cacioppo, & Schumann, 1983; Sorrentino, Bobocel, Gitta, Olson, & Hewitt, 1988). Perceived importance along with the shopper's personality frames the set of behavioral responses she will employ to satisfy her shopping need (Sorrentino, et al., 1988).

Shopper personal needs, wants, desires and values forms an understanding of the need occasion. Importance impacts shopper certainty level about the occasion determining how she will process purchase solution information. In situations of uncertainty which are perceived as important, systematic or central processes will be employed toward a purchase resolution (Sorrentino, et al., 1988). In situations of uncertainty with low importance, peripheral or heuristic processes will be employed toward a purchase resolution (Sorrentino, et al., 1988). However, in situations of certainty which are perceived to be important, she will conversely use peripheral or heuristic processing (Sorrentino, et al., 1988). Likewise, in situations of certainty but of low importance, she will alternatively use central or systematic processing (Sorrentino, et al., 1988). Therefore, the shopper who finds herself in familiar situations which carry high personal relevance will use the known scripting details to create heuristics in the formation of beliefs toward the purchase behavior. Conversely, the shopper faced with an unfamiliar occasion which also carries low personal relevance, will employ a systematic approach favoring normative beliefs for a more deliberate shopping approach.

The need occasion is therefore the lens which frames shoppers beliefs. Her beliefs will inform her attitudes and intentions toward her behavior which is the resolution of the purchase need. Having examined beliefs in detail, attitudes are the next level of the model to investigate.

ATTITUDES

Attitudes generally are learned over time, forming an inclination to respond in a consistent manner, either positively or negatively. This general description contains three

assumptions: learned, response and consistency to the response (Fishbein & Ajzen, 1975). However, this describes attitudes in general, and for the purposes of TRA and SVF the attitude must be specific. The specificity of the attitude increases the impact toward intentions which influence behavior. Recalling the discussion of self-monitoring, low self-monitoring levels result in stronger intentions to engage in the behavior (Ajzen, et al., 1982). High levels of self-monitoring result in individuals seeking support for a particular behavior situationally, which indicates lower certainty in their attitude, thus reducing its impact on intentions toward the behavior (Ajzen, et al., 1982).

Attitudes can also be examined in relation to consequences, either positive or negative, which result from behavior engagement. The attributes which define attitude specificity are orientated either internally or socially (external) (Batra, Homer, & Kahle, 2001). The more the individual sees the behavior as having a social significance (social consequences), the higher she will weight attributes with a social orientation (Batra, et al., 2001). In this research, attributes related to salty snacks such as flavor and brand may have a positive internal orientation and receive significant internal weighting. However, other salty snack attributes related to salt and fat may have a significant negative social orientation. Depending on the individual weighting assigned by the shopper, those negative social orientations may be strong enough to out-weigh the positive internal weighting. This would be particularly true for those individuals who are high in self-monitoring (Ajzen, et al., 1982).

Therefore, attitude strength is closely related to the individual's perception of the consistency of outcome consequences. The consistency of the consequence can have either a negative or a positive orientation, resulting in reinforced attitude strength in that

same direction (Fishbein & Ajzen, 1975). The consistency of the outcome can also be a construction of the individual (Côté & Levine, 2000). Attitude strength can further reinforce the intention leading to repeated behavior resulting in increased repetition of the outcome (Côté & Levine, 2000).

Attitude for the purposes of the SVF is found in the shopper occasion perception construct, as are subjective norms. Attitude will be discussed first, followed by the discussion related to subjective norms as they relate to shopper occasion perception.

SHOPPER OCCASION PERCEPTION

Shopper occasion perception (SOP) is informed by the beliefs identified during the initial need occasion stage. Through need occasion, beliefs toward the product required, occasion parameters and urgency, and an importance assignment toward both recipient and occasion have been formed. These beliefs, formed by the shopper, will drive the evaluation process for purchase need resolution. During SOP, the shopper leveraging her beliefs begins to examine her attitudes toward engagement in shopping for specific product(s) from particular brand(s), which are carried by certain retailer(s) at specific store location(s) or channels, in order to fulfill her purchase need. SOP is reflected in four constructs which determine how the shopper will move toward the actual shopping experience: product/service perception, motivation toward purchase, occasion role perception and subjective norms related to the product for the occasion. The balance of this section will discuss those constructs in that order, with the exception of subjective norms. Subjective norms will be discussed following an overview of subjective norms from a TRA perspective.

Motivation Toward Purchase

Shopper interest in purchase engagement is comprised of a set of motivations which the shopper needs to embrace in order to complete her purchase. One of the first area's which impact her motivation toward purchase is the context through which she will complete her shopping goal. Shopping context within the SVF refers to the type of shopping trip which is to be undertaken. In preparation for shopping, trip type categories are examined for their appropriateness in resolution of the purchase need. These categories, to a large extent, reflect the degree of effort required for trip preparation. In order to better understand the contexts which frame the shopping experience, a review of context definitions is provided.

Trip types are mentioned in the academic literature but they are far from uniform as can be seen in Table 5. One article may describe the trip in terms of store environment (Kim & Park, 1997) while another describes the trip through frequency of engagement (Recker & Kostyniuk, 1978) yet both are describing grocery. In another case, trips references the variety of products purchased, yet does not distinguish between a grocery trip which may include produce and CPG products (Arentze, Oppewal, & Timmermans, 2005). Another approach in the literature is to describe trip through quantity of product needs (ranging from significant to few) as well as a product type (Walters & Jamil, 2003). It has also been described through the shopper's orientation toward the trip as being either hedonic or utilitarian, discussing little about store or the type (Babin, et al., 1994). From the perspective of the academic literature, the development of a succinct typology of shopping contexts would be difficult to adopt. Overlapping definitions, reliance on varying frequency measures, along with dimensional variation within the

descriptions comprising the shopping trip, confound simplicity. Therefore for the purposes of this research the definitions of the different shopping contexts will be examined from an industry perspective.

Table 5 *Shopping Trip Contexts Academic Literature Typology*

Author	Shopping Trip	Definition
Kim & Park (1997)	Grocery	To visit a grocery Store
Recker & Kostyniuk (1978)	Grocery	Most frequent trip
Arentze, Opewal, & Timmermans (2005)	Multi-Purpose	Purchasing different goods on a single trip
Walters & Jamil (2003)	major shopping trips	Fulfill shoppers short and long-term needs; requires large amounts of effort, time and budget
	fill-in shopping trips	Fill pressing needs
	shopping for price specials	Primary goal is shopping for a product offered by a retailer at a special price
Babin, Darden & Griffin (1994)	Hedonic	Shopping is for the pleasure of the shopper
	Utilitarian	Shopping is to accomplish a specific goal which is functional to the shopper or recipient

Members of the consumer package goods (CPG) industry have adopted a set of shopping contexts utilizing specific conventions that make their application from a research perspective desirable. The industry typology represents the shopper's intention for the shopping trip which makes them more broadly applicable across product categories and retailer types. While the industry shopping context typology is beneficial

from a conceptual understanding, it requires, for academic purposes, some refinement so as to be useful as a point of adoption for this as well as future research. Table 6 outlines the industry nomenclature and definitions along with the modified definitions which are adopted for use in this research. As can be seen in Table 6 the industry typology

Table 6 *Shopping Trip Context Typology*

Industry Type	Industry Definition	Research Definition
Quick Trip	A common trip in which shoppers visit a store to purchase one to three items that fill immediate needs (such as that evening's dinner).	An immediate product(s) need for an imminent occasion of sufficient importance to warrant an unplanned trip for of a single or limited number of items.
Stock-up (Pantr Load)	A common store trip in which the shopper purchases a large number of grocery and general merchandise items to satisfy her needs over a period of time. Also known as pantry load.	A scheduled regular shopping trip to purchase items to maintain or replenish stock within the home for regular use. This trip will usually account for purchases of items for immediate use as well as items intended to last until the next stock-up.
Convenience	Common shopping trip in which store selection is based overwhelmingly on proximity and required time within the store.	A purchase driven by location proximity for items to be consumed at once or a known need where location and/or time in store outweighs all other shopper needs and inspires a spontaneous trip to complete a shopping trip.
Fill-In	One of the more common types of shopping trips in which a shopper visits a store in between stock-up trips to replenish several items and/or buy some additional products.	A purchase driven by the recognition that several items which, may be indeterminate importance, yet are regularly used require replenishment prior to the next planned stock-up.

Note: Industry type and definition were reprinted from *In-Store Marketing Institute. (2010). Shopper Marketing Glossary* http://www.instoremarketer.org/

separates shopping trips into unique segments which have separate defined intentions. The modifications implemented to aid in academic applications further clarifies each trip in an effort to reduce the opportunity for overlap between trips types due-to intention, product, or initiating event. All of the trip types have academic modifications although for the purposes of this particular research only one trip type (quick fill-in) will be used. The utility of the academic modifications, to the trip typology extends beyond this research, to future research. The adoption of a uniform typology would allow for examination of research results across studies, aiding in the understanding of trip type impact on the shopping experience.

In addition to determining the appropriate trip type, the shopper must also weigh the impact of competing interests such as; internal desires, occasion, others, social as well as time, money and effort constraints. Each of these elements also plays a role in motivation for the shopper. Motivation has been proposed to be a desire on the part of individuals to reach ever higher levels of their needs from physiological, to safety, love, esteem and self-actualization (Maslow, 1943). Motivation research has maintained this hierarchical orientation through the current literature (Wagner, 2007). While this hierarchical approach is beneficial from an intrinsic motivation level, it does little to assist with the motivation to perform across social dimensions related to occasion and shopping which drive shopper value.

Motivation has also been examined as a dimensional construct across a variety of categories (Westbrook & Black, 1985). Shoppers have been found to be motivated to

shop through one or a combination of seven different dimensions which are: role, choice optimization, affiliation, utility, negotiation, power, and stimulation (Westbrook & Black, 1985). Shopper motivation can be seen in various parts of the SVF. Affiliation and utility were already described in need occasion. Role is addressed later in the discussion of SOP. Choice optimization is described in the discussion on shopper targeting. The remaining dimensions, negotiation, power, and stimulation, are addressed in the SVF in shopper experiencing.

Motivation has also been examined through shopper outcomes, and strategies (McClintock, 1972). Motivation for shopping in this context can be seen as a desire to resolve the need recognition through purchase outcomes. The shopper navigates between her motivation toward a variety of different outcomes and her motivation toward engaging different strategies for achieving those outcomes. Each of those motivation orientations will vary in their level of desirability. Outcome motivations require the shopper to examine her intrinsic motivations toward the purchase solution. These motivations are influenced by the shopper's perception of the consequences resulting from her purchase selection, based on her conceptualization of the need occasion (Batra, et al., 2001).

Strategies employed by the shopper vary by occasion, recipient impact, and/or impact on others who are associated with the occasion (McClintock, 1972). Motivations can also be relative, reflecting the shoppers attempt to optimize across a variety of social dimensions and subjective norms in purchase need resolution (McClintock, 1972). There are also joint motivations, focusing the shopper away from intrinsic motivations and

toward those which may complement or conflict with her own. This results from an effort to please others which finds the shopper optimizing toward purchase solutions which may work best for others as opposed to self (McClintock, 1972). Finally the shopper may be motivated toward maximizing the outcome for the recipient to the exclusion of all others including themselves (McClintock, 1972).

These strategy motivations can alternately be described as motivation through individualism, cooperation, competition, and altruism (McClintock, 1972). A recap of these relationships can be found in Table 7. The role of perceived importance in defining motivation for the shopper in each of these strategies is pivotal. Different aspects of motivation are engaged as importance moving from, unimportant to important, for either the occasion, or recipient (McClintock, 1972). If an occasion is perceived important,

Table 7 *Shopper Motivation Strategy Matrix*

	Recipient	
Occasion	**Unimportant**	**Important**
Unimportant	Competitive	Altruistic
Important	Cooperative	Individualistic

while the recipient for that same occasion is perceived unimportant, the shopper would likely engage a cooperative motivation strategy toward the purchase resolution (McClintock, 1972). This is due-to the importance leverage in this scenario is oriented toward the individual making the purchase, so they would likely work with the recipient desires to find an acceptable mutual solution. If the occasion and recipient are perceived important, the shopper would likely engage in a individualistic motivation strategy as the importance dimensions are uniformly oriented toward the shopper (McClintock, 1972).

Assessments of unimportance for both occasion and recipient result in a competitive motivation strategy (McClintock, 1972). The lack of priority becomes a stress point for the shopper. The unimportant scenario still requires an attempt to find a purchase solution. However, the shopper is simultaneously attempting to find a purchase solution for another occasion which has perceived importance, thus interfering with value optimization for both. Finally, in cases where the occasion is unimportant, but the recipient is perceived to be important, the shopper would likely engage in an altruistic motivation strategy (McClintock, 1972). Importance in this scenario is leveraged in favor of the recipient, shifting shopper focus away from their own intrinsic motivations and toward the other. Therefore, for the shopper, occasion outcomes and strategies are impacted by perceived importance. The shopper's attitude toward importance will determine their motivation toward completing the shopping trip and securing the product required. Further, we can also see that the attitude of the shopper and their importance assessment also impact the role the shopper sees for themselves in the purchase need.

Occasion Role Perception

Beliefs also frame the role (e.g., mother, sister, friend, wife, co-worker, etc.) the shopper sees herself engaging for the projected need occasion in her pursuit of the purchase need resolution. Each role engaged by the shopper will also reflect her attitude toward the cultural expectations she perceives to be associated with that role. Cultural expectations provide a script for the shopper which is culturally appropriate for the occasion (Van Lange, De Cremer, Van Dijk, & Van Vugt, 2007). Her attitude toward that script will impact her satisfaction with her perceived role assignment. A recap of

elements which impact shopper occasion perception especially related to role can be found in Table 8.

The shopper faced with a social occasion will require at least a base level of understanding in order to frame a shopping action (Van Lange, et al., 2007). That action will be impacted by the role she sees herself in and what is culturally expected as a purchase response. The shopper, through her attitude regarding her role in a future social occasion, projects her intentions toward the anticipated behavior she will be expected to exhibit (Van Lange, et al., 2007). These projections are based on the shopper's attitudes towards her needs, motivation, and others who may be participating in the occasion. Additionally, she will project expectations regarding the interactions she expects to have with others at the future social setting (Van Lange, et al., 2007). Social dimensions of the occasion therefore, drive shopper behavior through the attitude the shopper has toward satisfying cognitive, affective and motivational goals which will fulfill cultural expectations predicated by the occasion (Van Lange, et al., 2007).

The literature describes a dimensionality for role ranging between unscripted and scripted. The level perceived by the shopper with regard to scripting impacts her attitude toward fulfilling that role (Alexander, 2004). Occasion scripting varies broadly from spontaneous (no scripting detail) to ritual (intense script detail) (Alexander, 2004).

Ritual and scripting is a recurring theme in multiple disciplines including the consumer literature (Alexander, 2004; Celsi, Rose, & Leigh, 1993; Cottle, 2006; Hequembourg, 2004; Kruger, 2009; Rook, 1985). Ritual occasion dimensions provide a script the actor (e.g., shopper) must follow. Shoppers who can engage a positive attitude

Table 8 *Elements Which Impact Role in Occasion Perception*

Author	Measure	Findings
Van Lange, DeCremet, Van Dijk and Van Vugt (2007)	Social Interactions	Expectations formed by anticipated interactions
	Ritual and Scripting	
Rook (1985)	Ritual and Scripting	Consumers engage in ritual behavior related to purchase and consumption
Celsi, Rose, & Leigh (1993)	Ritual and Scripting	People who can manage scripted and unscripted events are socially rewarded
Alexander (2004)	Ritual and Scripting	Effective role performance can result in masking self
Hequembourg (2004)	Ritual and Scripting	Improvisation is required when scripts must be adapted or event is unknown
Cottle (2006)	Ritual and Scripting	Unanticipated events alter scripts forcing improvisation
Kruger (2009)	Ritual and Scripting	Scripting details absence requires creation to fill gap
Locke (1967)	Ritual and Scripting	Self-interest will drive the shopper toward their maximum benefit
	Domain and Object	
Belk (1975)	Domain and Object	Domain is comprised of physical, social, temporal, task, and antecedent states
Chung, Chen, Chaboya, O'Toole, and Atabakhsh (2005)	Domain and Object	Domain will impact the perception of the object (product or service)

Table 8. *Continued*

Author	Measure	Findings
	Social Dimensions	
Gardner (1985)	Social Dimensions	Negative valence reduces performance through delay or incomplete fulfillment
Gilbert, Gill, and Wilson (2002)	Social Dimensions	Current social scenario impacts perception of future social scenario
Long and Averill (2003)	Social Dimensions	Social valence can impact perception of future occasions
	Subjective Norms	
Fishbein and Ajzen (1975)	Subjective Norms	Others held in esteem carry weight in decision making
Ajzen, Timko, and White (1982)	Subjective Norms	Self-Monitoring
Tuorila (1987)	Subjective Norms	Nutritional content
Lynne, Casey, Hodges, and Rahmani (1995)	Subjective Norms	Technology adoption
Steidlmeir (1999)	Subjective Norms	Gift giving
Terry, Hogg, and White (1999)	Subjective Norms	Group involvement
Wieseke, Homburg, and Lee (2008)	Subjective Norms	Brand adoption

toward script adherence may become so involved that they are no longer recognizable outside of that script (Alexander, 2004). High occasion certainty level generates an

attitude toward completing the purchase resulting in confidence and a positive predisposition toward the shopping experience (Alexander, 2004).

In the absence of a well defined cultural script the shopper must engage in compensatory behaviors to account for the missing script direction. These compensatory behaviors sub-optimize value for the shopper as they reflect performance for only a portion of the event elements (Kruger, 2009). Every day, shoppers engage in scripted and unscripted occasions. Unscripted and unannounced events intrude on a present occasion and functionally alter its script forcing the shopper to respond with an improvised solution (Cottle, 2006). Society often awards an elevated status to participants that have the ability to improvise (Celsi, et al., 1993). As shoppers experience these intrusions, they adapt through improvisation to execute their revised purchase solution (Hequembourg, 2004). Therefore, the location of occasion along the ritual/script dimensional plane has implications for the shopper. Scripted events accrue benefits to shoppers who know the script. The individual that is deeply familiar with the occasion and is confident in her ability to execute her role will generate a positive attitude toward the shopping experience resulting in increased value for the shopper (Alexander, 2004; Celsi, et al., 1993). Shoppers who are able to improvise an acceptable solution in the face of unknown occasion details may also generate a positive attitude and similarly experience an increase in value through the successful completion of shopping experience. Understanding the ritual/script detail of a need occasion and the requisite product required for the need occasion help to frame performance dimensions whose successful execution may provide value to the shopper.

In addition to the attitude the shopper has toward the shopping experience, she is also bound to recognize certain social conventions which relate to the product or service which is the target of her shopping experience. These subjective norms help to further frame her intentions toward completing her purchase task.

SUBJECTIVE NORMS

Subjective norms move beyond the normative beliefs discussed earlier through the introduction of perceived social pressure toward the engagement in a particular behavior. They are expressed as the sum of the normative beliefs and the motivation of the individual to comply with those norms which is represented as; $SN = \sum n_i m_i$ (Fishbein & Ajzen, 1975, p. 305). Subjective norms for the shopper are reference points for behavior approval which at some level she has a commitment to comply with (Fishbein & Ajzen, 1975). The more motivated she is to comply with the subjective norm, the stronger her attitude toward complying with the normative behavior will be (Ajzen & Fishbein, 1980). The impact of subjective norms on intentions is relative to the importance of those norms in relation to the shoppers attitudes (Ajzen & Fishbein, 1980). If the shopper's attitude has superior weighting to the subjective norms, the shopper is likely to follow her attitude and vice versa (Ajzen & Fishbein, 1980). For this research, the subjective norms would be summed for the purchase required which in this case are salty snacks.

Product Subjective Norms

There are many subjective norms which can apply to the shopper for a need occasion. The subjective norms could relate to behaviors for the event itself, or toward

interactions with others in attendance. However, for the shopper, the most salient subjective norms are related to the purchase of the product or service required for the need occasion. Subjective norms have been shown to hold influence for a variety of product scenario's such as; brand adoption, nutritional content, technology adoption, gift giving and even political candidates (Ajzen, et al., 1982; Lynne, Franklin-Casey, Hodges, & Rahmani, 1995; Steidlmeier, 1999; Terry, Hogg, & White, 1999; Tuorila, 1987; Wieseke, Homburg, & Lee, 2008). Therefore, in the context of the SVF, the shopper would acknowledge subjective norms toward her purchase goal. She would be required to account for their importance in relation to her attitudes toward the purchase of the target product. The subjective norms would be expected to help the shopper frame her solution set comprised in part of by product, brand, retailer and store location, and channel, which in combination satisfy the purchase need. The shopper's attitudes and subjective norms combine to impact her intentions toward the purchase of the product or service required for the need occasion.

INTENTIONS

Intentions represent the likelihood that the selection, action or behavior will be undertaken. As such it is a dimensional response ranging from weak to strong (Ajzen & Fishbein, 1980). The dimensional aspect associated with intentions is often what reduces their predictive power toward behavior. Even though intentions drive behavior they can only do so to the level of response strength which was formed through attitudes and subjective norms (Fishbein & Ajzen, 1980).

Intentions are predicated on attitudes and subjective norms which are subject to change, therefore, making their stability over time less reliable. The shopper through, continued experiences, learns from and alters her beliefs and attitudes toward a behavior (Fishbein & Ajzen, 1980). Similarly, culture, being a transient element, can alter intentions to fit with a new cultural paradigm (McCracken, 1986). It is this malleability to current situations which drives the need to measure intention in immediate proximity to the behavior (Ajzen & Fishbein, 1980). The closer the measurement is to the behavior, the less opportunity there is to introduce new learning or changes to intentions. If the intention is strong, and measurement can be made near the behavior engagement, the predictive ability of intentions can be quite accurate (Fishbein & Ajzen, 1980). Intentions in the SVF are found in the construct of shopper targeting.

Shopper Targeting

Shopper targeting within the SVF is where the shopper solidifies her intentions through the identification of appropriate brand(s), products(s), retailer(s), store location(s), and/or channels which could satisfy the purchase need. Targeting, traditionally, is considered part of segmentation, which is used by marketers to identify where to focus their efforts (Doyle & Saunders, 1985). Segmentation has a long tradition in the marketing literature and has been described as its core function (Sheth, 1967). Similarly, targeting by consumers enjoys a long tradition in the literature under the guise of loyalty. Through loyalty, the consumer segments a specific brand or retail solution from the universe available to them, on which to focus her spending (R. M. Cunningham, 1956). Shopper targeting reflects this same intentional selection and applies to brand,

product, retailer, store locations, and channels alike. Through shopper targeting she will identify where her efforts to secure the purchase need will be focused.

Shopper targeting results in the creation of an action set suited to a specific occasion framed by her SOP. The action set is comprised of the necessary components which the shopper requires to fulfill her shopping task. From a consumer perspective, shopper targeting represents the search, evaluation, and selection stages found in the consumer behavior model (Levy & Weitz, 2007). Shopper targeting reflects a process of attribute and benefit evaluations whose goals are value optimization for the shopper (McCracken, 1986; Spreng & Olshavsky, 1993). The shopper, through the need occasion, has identified attributes which are seen as desirable in the purchase need (Kumar & Karande, 2000; Pitts & Woodside, 1983) These include not only brand, product, retailer, and store locations but may also include space, time, setting and behaviors which the shopper perceives relevant to the need occasion (Barker, 1968; R. W. Belk, 1975). Based on her attitudes and subjective norms defined in SOP, the shopper will evaluate attributes across cognitive, affective and motivational goals tied to the social and cultural expectations of the need occasion (Van Lange, et al., 2007). The shopper's current assessment of cultural meanings associated with those attributes is not fixed but is subject to change (McCracken, 1986). Positive evaluations by the shopper of attribute performance can identify potential solutions which can be used toward attaining her purchase goal. Potential candidates, having met a minimum value threshold, move forward toward the action set (Bandura, 2002). In order to accomplish these evaluations the shopper must employ several processes the first of which is information processing. Information processing will be followed by a discussion of search and decision.

Information Processing

Information processing for shoppers is complex, reflecting her need to address not only the occasion but the purchase solution. The purchase solution itself will require her to address combinations of retailer, store location, product, and brand to identify primary and secondary target choices along with other products and/or services which may complement the target purchase. While information processing is complex, the general format of processing is described as the evaluation of just three main components: individual, environment, and situation (occasion) (Bettman & Jacoby, 1976).

The first component, individual, is impacted by seven attributes specific to the individual: processing capacity; motivation; attention and perception; information acquisition and evaluation; use of memory; decision rules and processes; consumption and learning (Bettman & Jacoby, 1976). Processing capacity is intrinsic to an individual and has a tremendous impact on the shopper's ability to attain value. Shoppers with more capacity can examine more input to utilize in solution development (Bettman & Jacoby, 1976).

The next set of attributes: attention and perception, motivation, information acquisition and evaluation, use of memory, decision rules and processes, are all framed for the shopper through her assessments made during need occasion and shopper occasion perception stages of the SVF. Attention and perception for shoppers is a function of her perception of, and urgency toward, the need occasion. This is of course impacted by the environment in which she recognizes the need (Gilbert, et al., 2002). Motivation for the shopper to complete the shopping experience begins with her importance assessment in need occasion and continues during SOP. Information

acquisition, evaluation, use of memory, and decision rules, while most identified with targeting, begins with the shopper's assessment of the need occasion (Bandura, 2002).

The final stage, consumption, is beyond the scope of the shopper. However, it is clear that her experiences with occasions, consumption, and reflection, would all be accessed through information acquisition, evaluation, and memory. As such, consumption can influence future purchases given the same or similar occasion (Bettman & Jacoby, 1976).

The second component, environment, relates to adaptability, which is a vital skill for the shopper. The environmental component contains two main processes, scanning and responding (Bettman & Jacoby, 1976). Scanning involves constantly reviewing the landscape for new information, assessment for relevance and value, and an evaluation of the present course (Bettman & Jacoby, 1976). Responding begins decision resolution between maintenance of the current target, or shift to a new target, in response to the new information (Bettman & Jacoby, 1976). Change introduced through the environment expressed in targeting is a further indication that the SVF must be a dynamic framework allowing for movement both up and down the hierarchy as change is recognized by the shopper.

Occasion, as has been demonstrated, is a determinate factor for the SVF and is also critical for information processing. Not only is the shopping need framed by a particular occasion, but shopping is also situationally bound. Will she shop alone or with someone? Is she time and/or financially constrained? Changes in her situation due to the environment (traffic jam, weather), distractions (mobile interruptions), and shopping need competition (motivation for one shopping need versus another), can all serve to

individually or collectively alter the shopper's situation (Bettman & Jacoby, 1976). In order to navigate these changes, she must categorize their impact and importance. Categorization provides insight into how to best assess the solution in light of the altered situation (Cox, 1967). Categorizing also helps to organize attributes for re-evaluation in relation to the purchase solution (Brunswick, 1956).

One method for attribute evaluation in the generation of the action set is the sorting rule. The sorting rule model is comprised of nine different processes: attribute categories, values and consequences, criteria, criterion-attribute relationships, predictive value, confidence value, sort, combine, and validate (Cox, 1967). While apparently complex, for a shopper it is parsimonious and efficient. Most value attribution models use econometric methodology to equate benefits with sacrifices across an all possible solutions set to estimate value for each outcome (McFadden, 1980). The sorting rule, through heuristics for benefit and sacrifice estimation, rapidly eliminates options during the modeling process (Cox, 1967). This allows the shopper to efficiently identify solutions with potential and move them into a set for further consideration without having to examine every possible solution option.

The sorting rule evaluates attributes using three processes: elimination of logical association, information selectivity, predictive and confidence value (Cox, 1967). Elimination of logical association is beneficial to the sorting rule as the preponderance of literature will acquiesce on the point of logic and rationality with respect to the consumer (Galbraith, 1938; Holbrook & Hirschman, 1982; Pollock, 2006). Allowing for seemingly non-logical or irrational attributes to be part of information processing allows shoppers to generate choice heuristics much more rapidly (Cox, 1967). The ability to leverage similar

information, experiences or preferences reduces the need the shopper has to generate new information. This can help to eliminate certain options faster as well as moving others more rapidly into an action set.

Information selectivity culls information from consideration when it has been found to lack sufficient value (Cox, 1967). Traditional processing models require all information to be maintained for use in evaluation (Postman & Tolman, 1959). Unnecessary information can confound confidence and predictive value, reducing the shopper's ability to assess its value. Therefore, the shopper through an estimation of value, discards any information deemed insufficiently beneficial (Cox, 1967).

Predictive and confidence, while similar, can actually work in opposition (Betts, 1985). Prediction absent of confidence often eliminates the predictor as a decision tool (Betts, 1985). Similarly, confidence absent of any ability to predict the outcome, often eliminates confidence as a decision tool (Betts, 1985). Therefore, the shopper's familiarity with the product and brand may raise her confidence value toward her targeted purchase solution. Her familiarity with the retailer, channel, and store location may raise her predictive value toward target product availability and shopping task completion. The shopper leverages these two values against her internal search to determine if she has sufficient information. A determination that her information is lacking, requires that additional supporting information be located through an external search (Allport, 1955).

Search

Internal and External

Search has been recognized in the literature to be reflected in two distinct activities; internal, and external. Additionally, the flow of search has been determined to

be hierarchical favoring first internal and then external (DeSarbo & Choi, 1998). Internal search is comprised of information stored in long-term memory. Stored information is available for recall and includes information gained from prior searches, marketing materials, word-of-mouth, and unbiased information providers (DeSarbo & Choi, 1998). Additionally, an important source of information for internal search comes from prior experience (DeSarbo & Choi, 1998). From a risk reduction perspective, the most potent forms of internal search are based on loyalty (Villas-Boas, 2004) or routine (Novemsky & Kahneman, 2005). Beliefs are also powerful predictors of search. In many cases, the belief that something possesses the appropriate attribute is enough to reduce search to the most cursory level (Duncan & Olshavsky, 1982). Beliefs are often grounded in some form of prior experience (Duncan & Olshavsky, 1982). However, that experience does not need to be first hand. Word-of-mouth can function as a surrogate in cases where outcome risk is low reducing the need to search (Herr, Kardes, & Kim, 1991). Regardless of the strength of the beliefs, loyalty or routine, internal searches at some point face an evaluation point to determine if the information is sufficient to act upon, or insufficient requiring additional information before acting. An insufficient evaluation, requires a conclusion of the internal search and the engagement in external search (DeSarbo & Choi, 1998).

External search has long been considered an integral part of consumer behavior. External search seeks information from sources other than personal experiences or prior knowledge, stored in long-term memory (Engel, Kollat, & Roger, 1973). External search requires an evaluation of the amount and type of search to be undertaken in order to satisfy the additional information needs (DeSarbo & Choi, 1998). This identifies a key

distinction between the two search processes: internal search is a relatively quick assessment containing no explicit cost and external search contains costs both real and/or perceived. External search requires the value of the information generated to be evaluated against costs associated with its development (Engel, et al., 1973).

The costs which are generally associated with external search are time, effort, and resources (Bettman & Jacoby, 1976). When the costs of an external search are perceived as increasing at a rate in excess of the benefit being received, motivation to continue the search may decline. An initial impression of high search cost alone can be sufficient to decrease the motivation to search (Punj & Staelin, 1983). Therefore, shoppers are primarily motivated toward external search through the risk that they may perform poorly (Schmidt & Spreng, 1996). This is particularly true when the shopper has little information for a given need occasion. Lack of clarity, teamed with increased importance, drives a need by the shopper to evaluate a larger set of possible solutions (Schmidt & Spreng, 1996). The solutions which are generated by the shopper will need to incorporate information tied to two main groups: retailer, store location, and channel and product and brand.

Retailer, Store Location and Channel Search

The determination of the channel, store location, and retailer requires identifying through, search (internal or external), those options which are deemed most acceptable for the need occasion (Dash, Schiffman, & Berenson, 1976). Assessments of acceptability often rely on choice, which is tied to intrinsic criteria establishing preferences (Dash, et al., 1976). Some of the selection criteria are self-confidence (both personal and product), risk, and importance (Dash, et al., 1976). In the SVF, channel,

store location, and retailer will be evaluated against the product required for the occasion, time available to complete the purchase and the role the shopper sees herself fulfilling. Her evaluation will also identify risks which may be a result of gaps in information or role clarity (Chaudhuri, 2000). As both risk in, and importance of, the product solution increases, the more likely the shopper is to select a specialty store for a solution (Dash, et al., 1976).

Specialty retailers, unlike general merchandisers, provide shoppers with specific information about a narrower set of products thus helping to instill more confidence (Dash, et al., 1976). Attributes which are specific to stores and retailers instead are convenience, service, selection, and employee knowledge (Schiffman, Dash, & Dillon, 1977). Price is frequently discussed as an important variable in store selection. However, price is universally important to the shopper, regardless of store type, thereby eliminating it as a variable for discrimination in store selection (Schiffman, et al., 1977). The retailer/store attributes can be separated into two distinct groups: retailer; comprised of services and selection, locations, and store location; employee knowledge and convenience (Schiffman, et al., 1977). Through this split orientation, a shopper who prefers a particular retailer may differ in preference for locations or channel, creating opportunities for the retailer and their competitors (Rao, 1969). When preference for a location or channel are the same as or stronger than the preference for the retailer, loyalty is generated insulating the retailer from competitors (Ailawadi & Harlam, 2004). Loyalty is gained through repeated positive experiences with a specific retailer and store combination (Rao, 1969). Additionally, bias toward a specific retailer and store location is associated with proximity to the most recent purchase (Rao, 1969). Positive

experiences can accumulate such that alternate store location or retailer choices lower in probability with each additional positive experience (Kuehn, 1962).

Inter- and intra-types of retail competition can effect selection. Intra-type is competition between similar retail types carrying similar merchandise (e.g. for grocery: Kroger, Publix) and inter-type is competition between different types of retailers who carry similar products (e.g., pharmacy: Walgreens, Kroger) (Levy & Weitz, 2007). The attribute selection of the type of retailer and the location of the retailer's stores has a significant impact on shopper choice selection (W. O. Bearden, 1977). Inherent in this line of research is the assumption that the shopper has the ability to select between competing retailers (Langston, Clarke, & Clarke, 1998). It is also assumed that shoppers can select between retailers who may not traditionally compete with one another, but through similarities in some of their assortments become a viable alternative (Langston, et al., 1998). The result is the generation of a vastly broader spectrum of retailer and store location choices to search and evaluate for the shopper.

Channel selection is an increasingly important consideration for shoppers. The channel choices which may at one time have been restricted to brick and mortar, now may include in addition; catalog, internet, television, direct to home, vending, and mobile (Levy & Weitz, 2007). Prior knowledge and prior experience are important in channel selection (Schoenbachler & Gordon, 2002). Additionally, channel specific factors (e.g., delivery, web site design, TV personality) are also important in selection (Schoenbachler & Gordon, 2002).

The shopper, in certain cases, may determine that she is best served with a non-retail solution such as; rental, borrowing and /or product creation (For more information

see Utility discussion in Decision). Based on the prior discussion we can set forth a matrix detailing the shopper selection evaluation of the retailer, store location and channel in Table 9. During the retailer, store location and channel selection process the shopper is also examining product and brand availability at each option.

Table 9 *Retailer, Store, and Channel Selection Matrix*

	Store Location			
Retailer	**Preferred**	**Alternate**	**Channel**	**Non-Retail**
Preferred	Preferred Option	Retailer - Location Ambivalent	Preferred	Rent Borrow Create
Alternate	Location - Retailer Ambivalent	Last Resort	Alternate	

Product and Brand Search

The literature on choice also addresses product and brand selection largely the same as the retailer and store selection. In fact, familiarity, experience, perceived importance and self-confidence are also important attributes for brand and product selection (Erdem & Keane, 1996).

Product and brand selection is simpler for consumers as there are no channel decisions to make, however, shoppers often include complementary products in their solution sets (Erdem & Keane, 1996) (See Table 10). Complementary products are those items that are seen to work well and are often supportive of the target product. Complementary products are often displayed in close proximity to one another in order to foster this relationship (e.g., pasta and sauce, boxed cakes and frosting) (Erdem & Keane,

1996). Complementary product relationships can be so strong that promotions for the target product will not only reduce sales in competitor stores for the target product but the complementary product as well (Erdem & Keane, 1996). In order to completely capture the shopper's solution set for product and brand, complementary products must be included as possible options. The result of the retail/channel/location and brand/product searches is the generation of options which could fulfill the shopping need. These options reside in one of two constellations: Retailer, Channel, and Store Location Solution Set Constellation and Product and Brand Solution Set Constellation.

Table 10 *Product and Brand Selection Matrix*

	Product		
Brand	**Preferred**	**Alternate**	**Complementary**
Preferred	Preferred Option	Brand - Product Ambivalent	Preferred
Alternate	Product - Brand Ambivalent	Last Resort	Alternate

Constellation Development

During constellation development, potential candidates are paired with at least one of the following physical attributes; product, brand, store location, channel, and/or retailer (Kumar & Karande, 2000; Pitts & Woodside, 1983). Once the attribute(s) have been assigned, the shopper begins to populate the constellation associated with the appropriate attribute(s). The items placed into each constellation have been determined

by the shopper to be in some way acceptable for the need occasion (Bettman, Luce, & Payne, 1998). The SVF uses two constellations: solution candidates identified with product or brand attributes (Pitts & Woodside, 1983) reside in the Product and Brand Solution Set Constellation (See Figure 4) and solution candidates identified by store location, channel or retailer attributes (Kumar & Karande, 2000) reside in the Retailer, Channel, and Store Location Solution Set Constellation (See Figure 5).

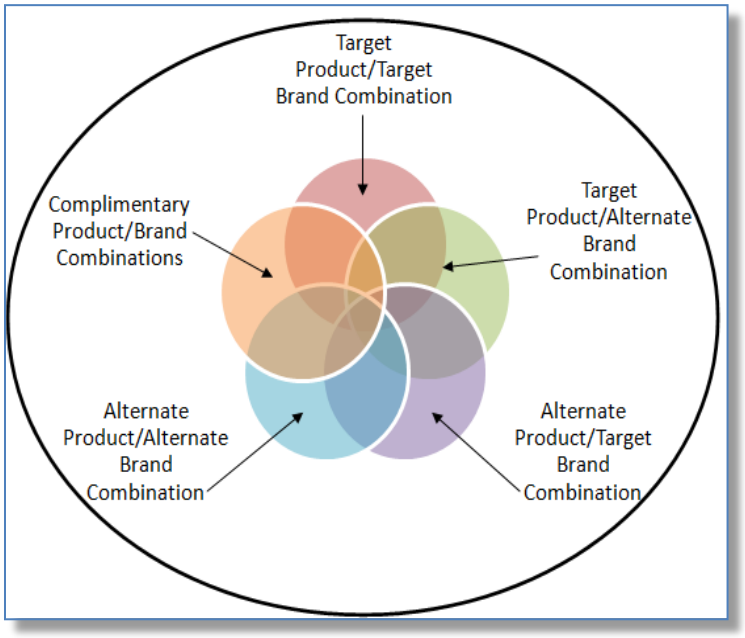


Figure 4. Product and Brand Solution Set Constellation

Once fully populated the shopper creates a choice set for each constellation. Through these choice sets, she begins to form cross-constellation connections which help identify viable solution alternatives. When connections are made those items move forward to the evaluation set (See Figure 6) (Bettman, et al., 1998) . The evaluation set

represents an assessment of the shopper's predictive and confidence value that those items could lead to a positive outcome and deliver shopper value (Betts, 1985).

The information at this point results in a determination that certain product and/or brand, and retailer, and/or channel and/or store locations could possibly be part of the purchase solution. However, the information lacks the required cross-constellation confirmation which would move the options from "could" satisfy, to those that "would" satisfy the purchase need. Lacking that confirmation it is not possible to determine what level of value a solution would generate. This determination is made through decision, and the items which are derived through decision populate the evaluation set seen in Figure 6.

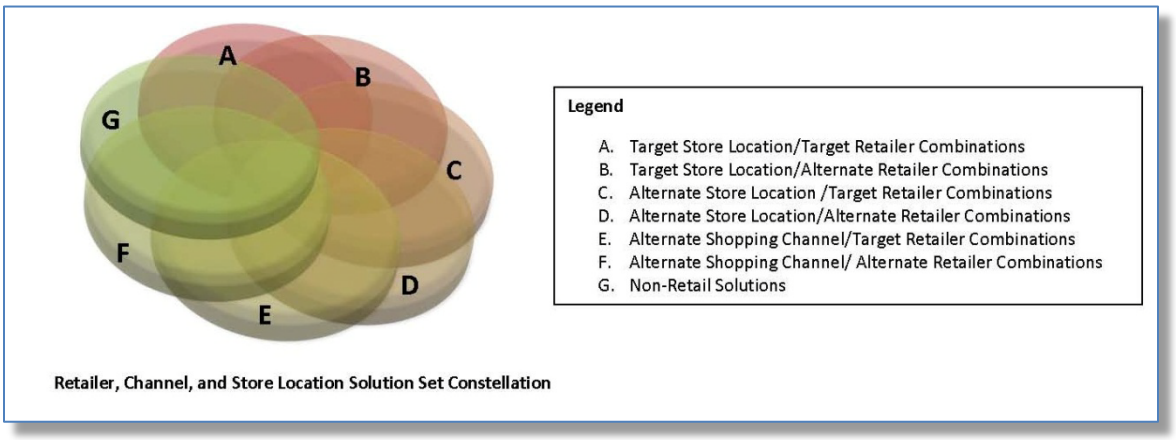


Figure 5. Retailer, Channel, and Store Location Solution Set Constellation

Decision

Decision is comprised of a series of evaluations to resolve possible options into a preferred set which the shopper can act on. As such, decision examines the potential

candidates from a variety of perspectives which include importance, risk/uncertainty, and utility. The review of decision will examine these evaluation processes in that order.

Importance, Risk and Uncertainty

Psychological comfort and confidence for the shopper are critical outcomes from the decision process (Koriat, Lichtenstein, & Fischhoff, 1980; Spake, Beatty, Brockman, & Crutchfield, 2003). Comfort is directly related to the shopper's belief in her ability to generate a satisfactory solution (Spake, et al., 2003). Comfort supports key aspects of the SVF including; need occasion familiarity, occasion role, and product need. As the level of the shopper's understanding increases in each of these areas, her anxiety associated with the purchase decision will decrease (Hill & Garner, 1991). Conversely, lack of familiarity with the occasion, role, and/or product will increase her discomfort through elevated uncertainty and anxiety (Harvey, 1999). Therefore, in an effort to reduce discomfort and anxiety, the shopper will engage in robust search efforts resulting in larger solution sets for use in identifying a satisfactory purchase solution (Germeijs, Verschueren, & Soenens, 2006).

Importance and risk are continuums which exists dimensionally from high to low (Healy, 1990; Weber, Blais, & Betz, 2002). Risk and importance maintain a strong relationship to one another (Bettman, 1973). In fact, as the importance of the decision increases, so too does the inherent risk (Bettman, 1973) (See Figure 7). The effort to reach a decision is therefore also related to the relationship of risk and importance (Bettman, 1973). Based on this relationship, occasions which the shopper perceives as low on both importance and risk engender little decision effort relying mainly on heuristics. Alternatively, those which are perceived as high in both importance and risk

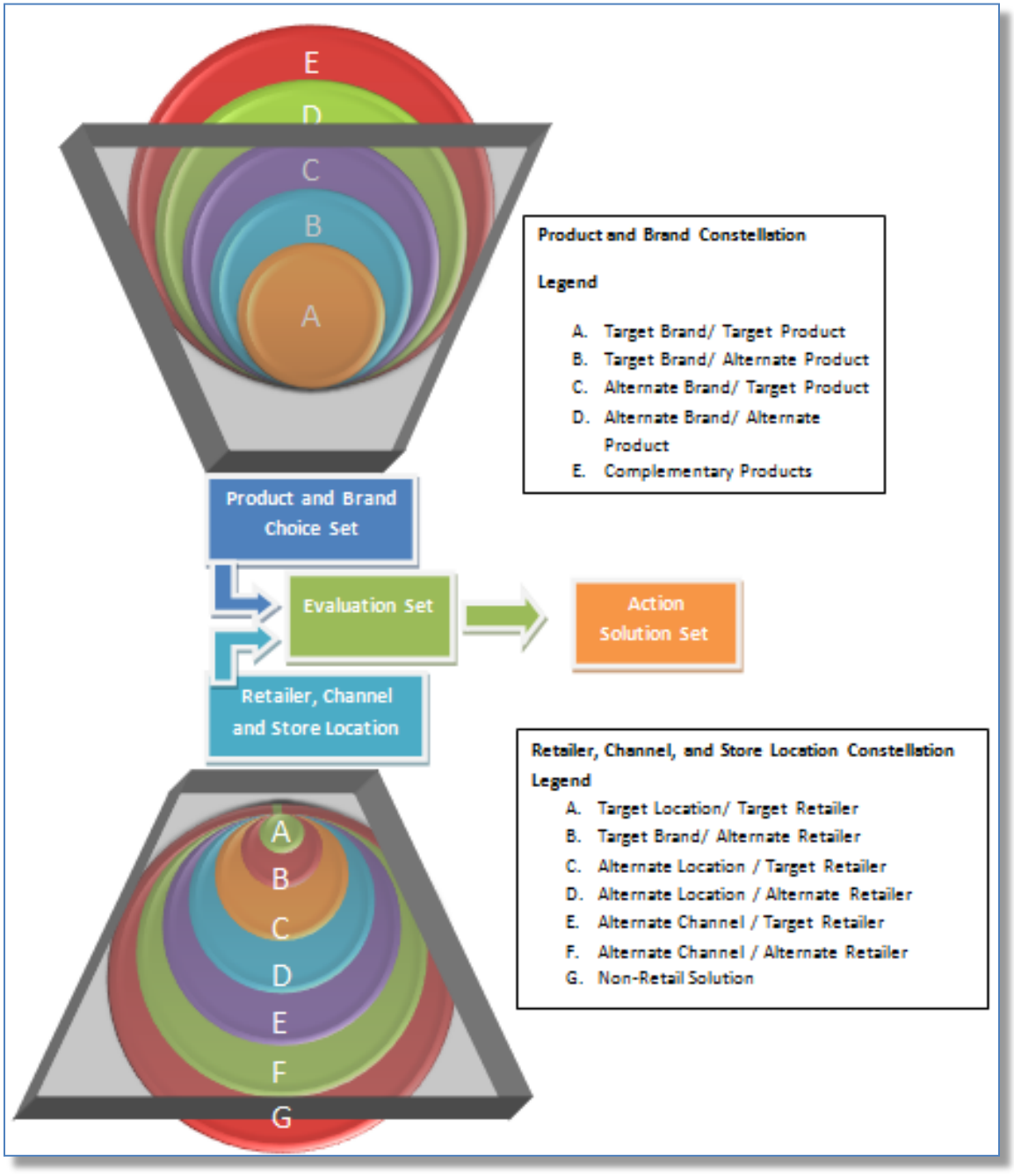


Figure 6. Shopper Targeting

will require considerable decision effort (Bettman, 1973). Low risk occasions, which are however important to the shopper, require minimal decision processing. This results in the employ of a decision heuristic which has demonstrated prior performance, reducing decision (Folkes, 1988). High risk occasions, with low importance for the shopper, require a moderate degree of decision effort. Perceptions of high risk for occasions outweigh low levels of importance driving discomfort and additional decision effort (Bettman, 1973). Therefore, in situations the shopper perceives as both high in risk and importance, she will expend the maximum amount of decision effort to ameliorate any negative impact resulting from a poor solution selection (Bettman, 1973).

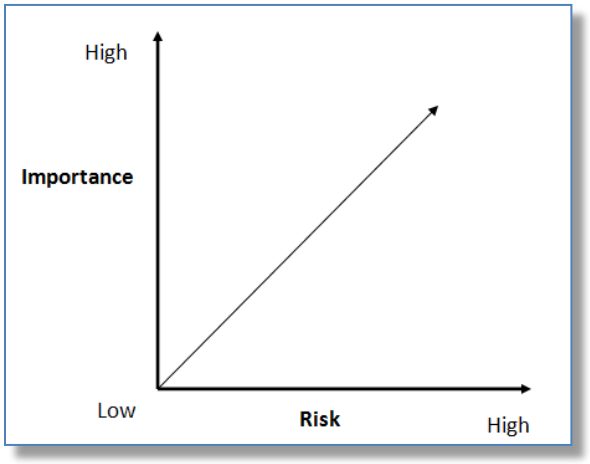


Figure 7. Relationship of Importance to Risk

Information search, as previously described, is designed to reduce decision uncertainty and risk in the marketplace (Cox, 1967). Uncertainty can be generated from too little or too much information. Too little generates anxiety as the attributes are perceived as inadequate to make a sound decision (Jacoby, et al., 1994). Too much

information drives anxiety from an inability to identify salience for discrimination between attributes (Malhotra, 1984).

Risks related to decisions are broadly classified as negative outcomes and their trailing consequences (Bauer, 1960). Risk can also be examined through the losses which are sustained through the assumption of that risk; financial, performance, physical, psychological, social, and time/convenience (Chaudhuri, 2000; Jacoby & Kaplan, 1972; Roselius, 1971). Risk can be attributed to the consequences of decisions made regarding events which are unanticipated or uncertain (Bauer, 1960). Uncertainty in the probability of a positive outcome drives levels of perceived risk and loss estimation (Zinkhan & Karande, 1991). Risk evaluations of actual events (e.g., physical or economic) can be assessed against objective measurable standards (e.g., bank balance, resale value, level of injury reduction). Perceived risk (social, economic, or physical) is subjective, therefore measurement is solely at the discretion of the individual (Zinkhan & Karande, 1991). The shopper will need to ascertain the amount of actual and perceived risk she can tolerate, through which she will identify the amount of search required to mitigate her uncertainty (Conchar, Zinkhan, Peters, & Olavarrieta, 2004). Not only does risk perception vary by individual, it also varies by situation. Depending on the situation, a shopper will perceived different levels of risk and loss estimation even when the purchase need is the same (Yates & Stone, 1992).

Occasion specific risk evaluation is assessed according to the level of clarity, or lack thereof, a shopper has for an occasion (Bunn & Shaw-Ching Liu, 1996). Therefore, through the SVF, the shopper is engaged in methodically reducing risk which can be attributed to; product, brand, store, channel, retailer, and the occasion itself. The

management of risk for the shopper is dynamic. While managing present occasion factors, she is simultaneously managing future occasions factors which are competing for her attention (Speier, Valacich, & Vessey, 1999). Inter-occasion competition is not unique and can be found in many shopping trips. Shoppers during a single trip will attempt to satisfy shopping goals comprised of multiple occasions. For example, a weekly stock-up, may also include a birthday card purchase and a prescription refill. Competition between and/or the introduction of new occasions, can lead to decreased task efficiency, resulting in increased risk and reduced decision making quality (Speier, et al., 1999). Goal fragmentation impinges on shopper decision making, resulting in the subjugation of her primary objective. As focus shifts away from her original attribute assessments and toward expedient attributes such as convenience, she sub-optimizes value for her shopping experience (Barnes, 1984).

It has been suggested that one of the most important goals of marketers is to reduce the level of perceived risk (Conchar, et al., 2004). The opportunity for marketers and retailers to collaborate on risk reduction at the point of purchase is one of the greatest benefits of shopper marketing. Marketers and retailers who work with the shopper on risk reduction, benefit from an enhanced brand position, reducing her need for search, thus focusing her choice in future purchase need occasions (Kuehn, 1962).

Utility

Through risk evaluation, an estimate of utility is made, which can result in a decision to not purchase (Degeratu, Rangaswamy, & Wu, 2000; Thaler, 1980, 1985). Utility evaluation (utility gain for risk assumed) is another part of the decision process as solutions are identified as potentially appropriate for the need occasion (Thaler, 1985).

The no-purchase decision, is generated through a utility estimate which fails to rise to an acceptable level (Thaler, 1985). The no-purchase decision however, does not necessarily represent failure to achieve a solution. The shopper can exercise options other than purchase; delay pending market change, accumulate more resources, or select a substitute (Greenleaf & Lehmann, 1995). Depending on the product, she could exercise other options such as; rent, or borrow (Bolam, 2000; Gruen, Corsten, & Bharadwaj, 2002; Knox & Eliashberg, 2009). Additionally, given certain levels of talent, time and resources, she could opt to create the product or perform the service (Burgert, 2003).

Decision is the final step in creating the action set which will determine not only the product but the place for the shopper. Through decision, the she moves from shopper targeting, to shopper experiencing. Her decisions shift from product assessment to goal attainment (Panian, 2007). Armed with her action solution set, the shopper may have to change from her primary purchase solution, to a secondary purchase solution, or to an entirely new purchase solution which was not unknown prior to shopper experiencing (Panian, 2007). New purchase solution needs can arise during shopper experiencing, for many reasons; stock outs (Aastrup & Kotzab, 2010), in-store marketing (P. Chandon, Hutchinson, Bradlow, & Young, 2009), internal budget calculations, (Stilley, Inman, & Wakefield, 2010), personal interactions (Netemeyer, Maxham III, & Lichtenstein, 2010), and mobile interactions (Houliez, 2010). These new purchase needs require quick decisions from the shopper. However, through her prior deliberation and action solution set development, the shopper has the ability to respond changes in her environment.

Shopper Targeting Outcome: Action Solution Set

The shopper seeks to maximize value from the shopping experience through the action solution set. The action solution set is comprised of product and brand combinations, as well as channel, store locations, and retailer combinations. These are the combinations which she has identified as having the greatest potential to satisfy the product or service need for the occasion. She will evaluate the subsequent shopping experience for value, which is accrued during the process to obtain the purchase need solution.

The action solution set is the outcome of shopper targeting, represented in Figure 8. The action solution set is comprised of those items which the shopper has determined meet a base level of performance on a variety of attributes including; function, affect, culture, and cognitive (Bandura, 2002). Further, the items included having combinations of; product, brand, channel, store location, and retailer, which the shopper has assessed as highly probable of attainment in pursuit of her purchase solution (Bandura, 2002; Bettman, et al., 1998). Unfortunately, not all purchase need solutions can be resolved to this level of certainty.

However, for inclusion in the action solution set, a minimum acceptable level of value for the shopper must be met (Bettman, et al., 1998). Therefore, items included in the action solution set have been determined by the shopper to have the same likelihood of availability, which moves them from potential, to probable solutions (Kumar & Karande, 2000; Pitts & Woodside, 1983). This assessment is achieved by the shopper, through search. Her evaluation of the information gathered determines which items have a proportionately higher probability of availability during her shopping experience,

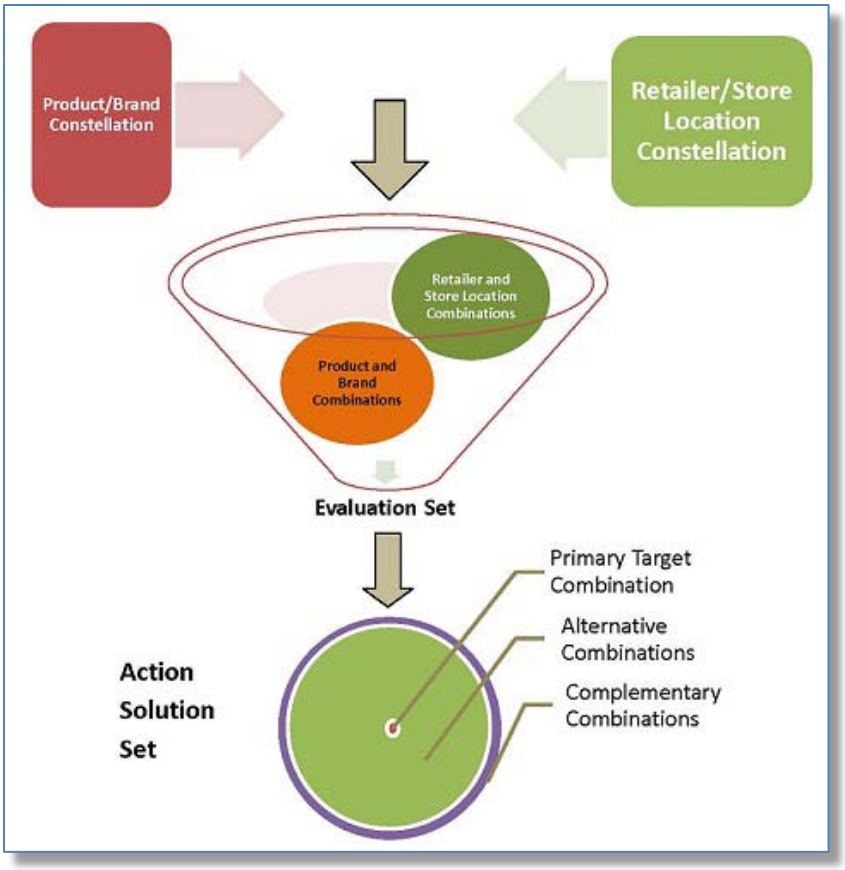


Figure 8. Shopper Targeting Process Model

moving them into her action solution set (Rao, 1969). With the action solution set populated, the shopper moves forward to the shopping trip represented in the SVF by shopping experiencing.

BEHAVIOR

Behavior, especially as it relates to TRA, is often confused with outcomes (Ajzen & Fishbein, 1980). In this research, the behavior is shopping for the identified purchase need, while the outcome is the assessment of shopper value. The outcome results in a set of behaviors or behavior category, which is shopper experiencing (Ajzen & Fishbein,

1980). Unfortunately, categories are not, as a group, observable and instead must be indicated through the engagement in single acts (Ajzen & Fishbein, 1980). Single acts are identifiable sub-components of the behavior category (Ajzen & Fishbein, 1980). In the case of this research, driving to the store, selecting products, and purchasing products, would be representative of single acts which would serve as indicators of the behavior category.

Behavioral elements, reminiscent of situation as described by Belk (1974), are comprised of; target, context, time and action (Ajzen & Fishbein, 1980). For this research: the target is salty snacks; context is oriented to the type of shopping trip (e.g., quick fill in, stock-up); time is associated with the occasion occurrence; action is the purchase of the identified product need (e.g., Lays potato chips). The shopper will be influenced by many events during her engagement of the shopping behavior. In combination, these events comprise the SVF stage of shopper experiencing.

SHOPPER EXPERIENCING

Experience related to the shopper and shopping has been recognized in the literature in three main streams; experience, atmosphere, and hedonic and utilitarian. The streams will be presented in this order based on the earliest publication in the marketing literature for each stream. A recap of articles found in each stream can be found in Table 11.

The experience of shopping can influence shoppers and the products they purchase. The shopping experience encompasses those actions undertaken by a retailer in a deliberate attempt to develop favorable impressions from the shopper. These

impressions can involve environmental cues, service cues, product cues, and display cues as an example (Cardozo, 1965; Childers, Carr, Peck, & Carson, 2001; Hare, Kirk, & Lang, 2001; Kerin, Jain, & Howard, 1992; Kim, 2001; Kim, et al., 2007; Machleit & Eroglu, 2000; Ofir & Simonson, 2007; Sweeney & Soutar, 2001; Terblanche & Boshoff, 2006; Vijayasarathy & Jones, 2000; Yuksel, 2004). One such area which can influence shoppers is atmosphere.

Store atmosphere and atmospherics also impact experience as shoppers are bound to their environment. Many environmental elements have been studied for their impact on the shopper including; light, sound, temperature, crowding, and color (Eroglu, Ellen, & Machleit, 1992; Eroglu & Harrell, 1986; Graham, Hsia, & Berger, 1955; Hebb, 1942; Langrehr, 1991; Licklider, 1956; Pirenne, 1946). The store environment plays an important role in generating a positive shopping experience. Atmosphere research also examines aroma, product placement, social interactions, time of engagement, time in store, repeat patronage, as well consumer value (Baker, et al., 1992; Baker, et al., 1994; J. Baker, Parasuraman, Grewal, & Voss, 2002; Bitner, 1992; Chebat & Michon, 2003; Eroglu, Machleit, & Davis, 2003; Kotler, 1973; Mattila & Wirtz, 2001; Mehrabian & Russell, 1974; Smith & Curnow, 1966; Turley & Milliman, 2000; Yalch & Spangenberg, 1993). The investments in store atmosphere can have a significant impact on the hedonic or utilitarian perception of the shopping experience.

The third major stream examines the impact of the hedonic (pleasure) and utilitarian (function) dimensions in shopping. Hedonic and utilitarian dimensions can relate to the shopper, the product, the trip type and of each (Kim, et al., 2007). Satisfaction, pleasure, frustration, value and intentions toward repeat behavior are

Table 11 *Shopper Experience Development in the Literature*

Experience/Experiential		
Author	Setting	Findings
Cardozo, (1965)	Product Purchase: Pen	Product and experience have a reciprocal relationship with satisfaction
Kerin, Jain, and Howard, (1992)	Supermarkets	Shopping Experience important to consumer value perception
Machleit, and Eroglu, (2000)	Assorted Physical Shopping Environments	Emotions vary dramatically across differing shopping environments and that the use of the Izard Human Emotions, Plenum, and Plutchik Emotion Synthesis, outperform the Mehrabian and Russell A/A and PAD
Vijayasarathy and Jones, (2000)	Shopping Channel Selection	Perception of the Shopping experience influences channel selection
Childers, Carr, Peck, & Carson, (2001)	On-line Shopping	Beyond basic navigation and sales facilitation immersive hedonic elements predict strong re-patronage intentions
Hare, Kirk, and Lang, (2001)	Seniors grocery shopping	Internal and external store characteristics can enhance or detract from older consumers shopping experience leading to poor nutrition outcomes. Social is the only uniform positive influence
Kim, (2001)	Conceptual	Five concepts for experiential retail environments: experiential consumption, symbolic consumption, entertainment retailing, themed retailing, and cross-shopping
Mathwick, Malhotra, and Rigdon, (2001)	On-line and Catalog	Experiential value scale (EVS) measures perceptions of playfulness, aesthetics, customer “ROI” and service excellence. Predictive tool for value and re-patronage.

Table 11 *Continued*

Author	Setting	Findings
Sweeney, and Soutar, (2001)	Durable Product Purchases	Perceived value scale (PERVAL) measures perceptions of the value of consumer durable goods at a brand level for emotional, social, quality/performance and price/value for money. Tested reliable and valid both pre and post-purchase.
Yuksel, (2004)	Cross-cultural Tourist Shopping	Domestic tourists are significantly more negative toward service versus international tourists.
Terblanche, and Boshoff, (2006)	In-store Shopping	Positive shopping experience increases re-patronage and sales performance both measures of loyalty.
Kim, Sullivan, and Forney, (2007)	All Forms of Retail	Textbook reviews all relevant research and understanding of experiential retailing.
Ofir, and Simonson, (2007)	Grocery and Pharmacy	Stated expectations for shopping trips lead to negative assessments of the shopping trip

Atmosphere/Atmospherics		
Author	Setting	Findings
Smith and Curnow (1966)	Supermarket Sound Variation	Louder music does not drive out shoppers and increase spending
Kotler, (1973)	Conceptual	Atmosphere includes all senses visual, aural, olfactory, and tactile but not taste. A causal chain of atmospheric impact is proposed along with several propositions related to atmospherics and marketing.
Mehrabian, and Russell, (1974)	Shopping as well as products	Ambient and/or social features can lead to either approach or avoidance behavior on the part of consumers

Table 11 *Continued*

Author	Setting	Findings
Baker, Grewal, and Levy, (1992)	Ambient and social factors in a gift store	Ambient and social interact to increase shopper pleasure and increase purchases. Pleasure and arousal may mediate store environment.
Bitner, (1992)	Conceptual	Servicescape typology offered. A framework for environment and user interaction developed.
Yalch, R., and Spangenberg, E. (1993)	Music variation by department apparel store	Age and music positioning fore or background impact pleasure and purchases
Baker, Grewal, and Parasuraman, (1994)	Ambient and social factors in a gift store	Service and merchandise quality perception influence store quality perception. Ambient and social factors have more impact than store design elements.
Turley, and Milliman, (2000)	Review	Comprehensive review of atmospheric elements and the results of their impact on shoppers in the literature.
Mattila, and Wirtz, (2001)	Music and Scent varied in a gift shop	Congruency between arousal levels of ambient factors increases shoppers' perception of the environment. Dis-congruity may reduce shopper pleasure.
Baker, Parasuraman, Grewal, and Voss, (2002).	Gift store videotape ambient, social and design tested	Design impacts store choice; poor design may increase shopper stress. Social cues from employees had no effect. Music had only a limited effect.
Chebat, and Michon (2003)	Scent in a shopping mall environment	Compared performance of environmental psychology theory and emotion-cognition theory. Emotion theory better fit the data.
Eroglu, Machleit, and Davis, (2003)	On-line store atmospherics	On-line store atmospherics of high task relevance and responsiveness lead to involvement which positively influences shopper emotional-cognitive states increasing perceptions and outcomes.

Table 11 *Continued*

Author	Setting	Findings
Hedonic and Utilitarian		
Hirschman, E. C., and Holbrook, M. B. (1982)	Conceptual	Extend the study of consumer behavior beyond cognitive to include; product esthetics, multi-sensory product enjoyment, codes in communication, time and pleasure, product-related fantasies and imagery, feelings related to consumption, play, enjoyment and fun.
Holbrook, and Corfman, (1985)	Shopping Mall Patrons	Both hedonic and utilitarian attributes of the shopping experience are needed to best explain future patronage
Havlena, and Holbrook, (1986)	Emotional responses to consumption	Rating of consumption experiences between PAD and emotion-cognition tested indicating PAD is preferred.
Babin, Darden, and Griffin, (1994)	Shopping mall	Develops a perceived personal shopping value scale measuring hedonic and utilitarian shopping value.
Childers, Carr, Peck, & Carson (2001)	On-line motivations to shop	A base level of utility must be imbedded in an online site however the hedonic aspects related to the site will encourage positive shopper outcomes and increase positive reception and re-patronage intention.
Kim, (2002)	Shopping mall and On-line	Hedonic and utilitarian aspects of shopping should be targeted by channel to improve customer retention. On-line focus on visual, and aural. Mall engage visual, aural, olfactory, tactile and taste. Both need to engage design.
Arnold, and Reynolds, (2003)	Assorted Physical Shopping Environments	Hedonic shopping motivation scale; six-factor scale adventure, gratification, role, value, social, and idea shopping. Five shopper segments; Minimalists, the Gatherers, the Providers, the Enthusiasts, and the Traditionalists

common outcomes related to hedonic and utilitarian dimensions (Arnold & Reynolds, 2003; Babin, et al., 1994; Childers, et al., 2001; Havlena & Holbrook, 1986; Hirschman & Holbrook, 1982; Holbrook & Corfman, 1985; Kim, 2002).

Taken together, these streams represent the impact of the present environment on shopper experiencing (Gardner, 1985; Stayman & Deshpande, 1989). The shopper enters the shopping experience with an initial mood, which through the environment and other events throughout the experience, combine to alter her mood in either a positive or negative direction (Carrington, 2003; Swinyard, 1993).

Variables which can impact mood for the shopper are myriad. Some variables, like traffic, can impact the shopping experience in advance of the retail environment engagement by the shopper. Congestion, whether due to time of day, construction, accident, or event, can have a direct impact on shopping behavior (Schmocker, Fonzone, Quddus, & Bell, 2006). A similar variable is parking. The shopper may have considered parking during store location selection but, upon arrival changes such as a full lot, lot condition, lighting, or other changes could impact shopper choice (Koppelman & Hauser, 1978). This too may work with mood and result yet again in an alteration to the solution choice set prior to shopping.

While engaged in shopping, she may be continually disrupted, resulting in minimal, to comprehensive changes to the shopping experience. In all cases, disruptions distract from the attainment of the purchase target (Bettman, 1979). Changes caused by interruptions are more likely to be perceived negatively and increase in impact as other pressures (e.g., time, finances) increase (Wright, 1974). Examples of interruptions which can impact the shopper are social interactions, staff interactions, product placement, in-

store events, media encountered and mobile devices (Ong, 2006; Xia & Sudharshan, 2002).

However, the shopper may encounter major disruptions during her shopping experience, forcing her to completely re-evaluate her purchase target. This re-evaluation may involve not only the product or brand, but the store location, retailer, and channel as well. One major disruption which the shopper may encounter is out-of-stock (or stock-outs) of her purchase target. This not only has short term impact on the shopping choice, but may also have a long term impact on brand (Campo, Gijsbrechts, & Nisol, 2000; Sloot, Verhoef, & Franses, 2005).

Shopper experiencing therefore, encompasses all of the physical acts involved in completing the purchase of the solution target. This begins once the target is determined and concludes at the check-out. The shopper throughout, is subject to her initial state and all interceding events. Each of these events will by their nature impact shopper value.

SHOPPER VALUE

In the literature there is a long tradition of examining customer value through a series of trade-offs. A significant amount of that literature takes a mathematical perspective postulating; the sum of benefits accrued to consumers, minus the sum of the resources expended during acquisition, (in some cases also missed opportunities) nets to customer value. One examination of the customer value literature explores the landscape through a review of the following literature (Anderson, Jain, & Chintagunta, 1992; Anderson, Narus, & Rossum, 2006; Butz Jr & Goodstein, 1996; Gale & Wood, 1994; Monroe, 1990; Zeithaml, 1988), and presents the consensus trade-off viewpoint which is;

value exists between what the customer receives and what she gives up to acquire and use a product (R. B. Woodruff, 1997). Further investigation into current academic literature finds continued use of this viewpoint, particularly the model proposed by Zeithamel (1988) (Caruana & Ewing, 2009; Collier & Sherrell, 2010; Shukla, 2010; Zielke, 2010). However, a different description of value, focused on the perceived outcome not the process of selection, is applicable to shopper value (Woodruff & Gardial, 1996). This concept of value considers the individual's evaluation of attributes and sacrifices framed by occasion, in relation to goal achievement (R. B. Woodruff, 1997).

This conceptualization of value flows seamlessly from the valuing perspective with its focus on; attributes, preferences, performance, and goals (values, needs, wants and/or desires). The SVF places the shopper in the center of an occasion specific evaluation process. Therefore, the recognition of occasion being important in evaluation makes this value understanding more appropriate for use in the development of shopper value. The shopper determines value by evaluating gains and losses throughout the shopping process based on her assessment of attribute benefit. The dynamic nature of shopping does not allow for a complete assessment of value until the experience has concluded. Therefore the shopper will assess value based on their shopping experience in relation to their; values and goals, perception of the occasion, and target product solution as seen in Figure 9.

Therefore, based on the theoretical foundations provided in the literature, it is proposed that shopper value be defined as the following:

> The shopper's perception of their desired outcome for a specific shopping occasion through the engagement of a product, brand, retailer, channel, and store location in combination, toward a purchase solution of an identified need.

This definition of shopper value describes the culmination of the shopping assessment process. The process which the shopper employs in pursuit of the generation of value also describes the process model for attaining shopper value. Therefore, the balance of this section of Chapter Two will describe the constructs as proposed in the SVF which are, Need Occasion, Shopper Occasion Perception, Shopper Targeting, Shopper Experiencing, concluding with Shopper Value. The theoretical support for the constructs as well as a proposed process for how the shopper would move through the model will be explored.

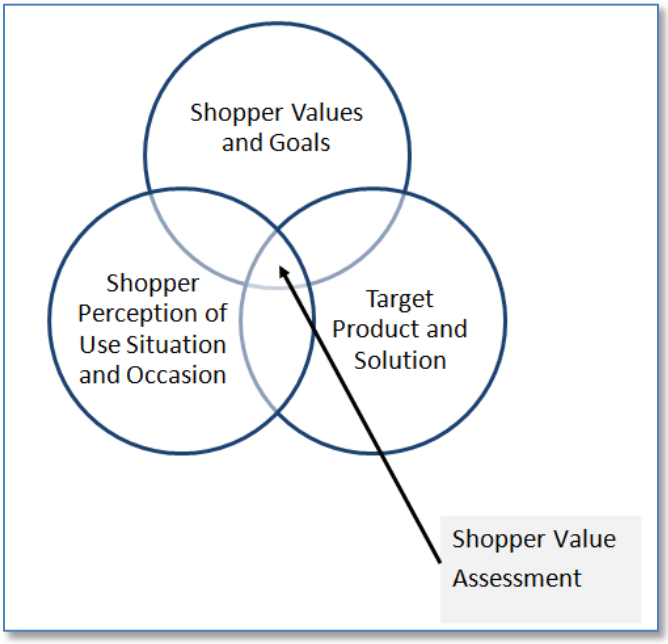


Figure 9. Shopper Value Assessment

SECTION TWO: SHOPPER VALUE FRAMEWORK AND METHODOLOGY

SHOPPER VALUE FRAMEWORK

The SVF as has been described as comprised of five components; Need Occasion, Shopper Occasion Perception, Shopper Targeting, Shopper Experiencing, concluding with Shopper Value. The framework can be seen in Figure 10, along with a comparative representation of the theory of reasoned action (TRA).

During each evaluation stage, we can look to Woodruff (1997) who discusses consequences related to the shopper's goals. The attribute set created by the shopper for evaluation, is used during both need occasion and SOP, as well as shopper targeting and again shopper experiencing, impacting shopper value at each point. Costs are generally discussed as a separate shopper consideration. Often costs can be found modeled as a moderator, however in this model, costs which are perceived as consequences, are inherent in each of the evaluations the shopper undertakes.

This is a framework for a highly dynamic and iterative process. At any point prior to the assessment of value, the shopper may find herself re-evaluating her situation based on new and relevant information. As a result, she may need to move backward into the framework to a stage which would allow for the development of a new structure for the shopping experience. Throughout this back and forth within the framework, multiple touch points exist at which retailers and marketers can address value with the shopper. Opportunity to add value exists in each stage of the framework. Through the framework, the shopper can be examined from a value creation perspective. Identifying

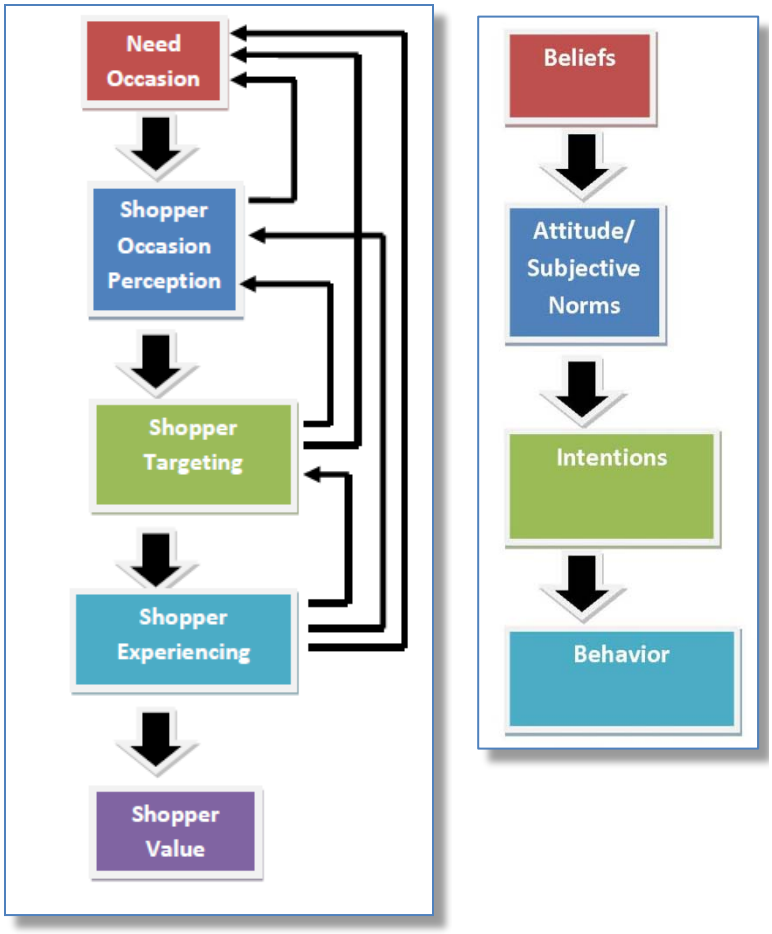


Figure 10. Shopper Value Framework and Theory of Reasoned Action

value enrichment points with her can drive marketing measurement and sales performance.

Mixed Method Approach

Throughout Chapter Two, literature has been reviewed highlighting TRA as a theoretical framework supporting the SVF. Additionally, the literature supported the need to investigate shoppers as unique from consumers including how they may assess value. In order to address these gaps in the literature and to bring definition to shoppers, and shopper value, an exploratory investigative approach has been undertaken. In cases

requiring foundational research into the understanding of a phenomenon, mixed-method approaches are often applicable.

A mixed-method approach utilizes two or more methodologies to address the same or similar aspects of a phenomenon. The combination of approaches provides for a more thorough examination of the phenomenon than a single study (Greene, Caracelli, & Graham, 1989). Research into the use of mixed-methods approaches reveals five purposes relevant to multiple methodologies: triangulation, complementary, development, initiation, and expansion (Greene, et al., 1989). As this research is designed to initiate the understanding and theoretical support for the processes employed in the creation of value by the shopper, a mixed-method would clearly be appropriate. The developmental goal leverages the strengths of one methodological approach to gain understanding, which can be combined with the strengths of another methodological approach, to inform and further validate results (Greene, et al., 1989). Using this format leads to a sequential approach to the research, which is followed here. The research objectives are met using first; a qualitative study using laddering theory, followed by a quantitative study using an experimental design.

Converging the findings

The mixed-method approach applied in this research is designed to develop a better understanding of the shopper and how they may assess value. The sequential mixed method design used in this study is uniquely suited to the development of knowledge when little is known about a particular phenomenon (Greene, et al., 1989). Mixed-method studies may also use a concurrent approach. However, the sequential mixed-methods approach utilizes the information gathered in the first study to help inform the second

(Greene, et al., 1989). That approach is particularly appropriate given the exploratory nature of this investigation. Therefore the information gathered in the value laddering qualitative study, will be used to inform the experimental design quantitative study. Chapter Three will focus on a more in-depth explanation of the two methodologies and how they apply to this research.

CHAPTER TWO SUMMARY

Chapter Two provides a compelling need for further investigation into shoppers and value creation. The examination of the literature highlights similarities and identifies differences related to consumers, shoppers and value, which are in need of further investigation. Additionally, shopper marketing and its growing importance to both brands and retailers have also been shown to be in need of further study. Differences which exist in nomenclature between industry and academia as well as within each of those realms combined with a lack of clarity in how to measure performance are just two indicators for the need for more study.

Section one investigated the literature relevant to this research, with a particular focus on consumer behavior. Additionally, the theoretical framework supporting the SVF, the theory of reasoned action, was examined. Section two provides a brief overview and representation of the shopper value framework. A representation of how the theory of reasoned action constructs correspond with the constructs in the SVF is also presented. A review of the methodological approaches for the study is supplied, along with an explanation of how the research will be combined. In combination, these two sections provide an understanding of the shopper's environment and the variables which impact

her. This understanding generates the SVF which begins to address gaps related to shoppers and shopper value.

CHAPTER 3 -- METHODOLOGY

This chapter examines the methodological approaches used in the investigation of the research objectives of this study. The chapter is divided into two main sections examining the qualitative methods, followed by the quantitative.

The research uses a mixed-methods approach in a sequential format. The qualitative study broadens the understanding of the shopper and how she approaches value creation. These studies support the limited information in the literature on shoppers, and shopper value. The qualitative research uses face to face long form interviews with a theoretically drawn sample. The qualitative study investigates research objectives one, three, four, five and parts of six, and seven. The focus of the qualitative study is on the identification of variables which impact how the shopper approaches the shopping experience. The quanitative study examines research objectives one, two, three, five, parts of six, and all of seven, (a recap can be found in Table 12). The quantitative study measures the impact of perceived occasion importance, perceived recipient importance, shopping context and shopping social situation on shopper value outcomes. An experimental design is used to examine the impact of the social factors on shopper outcomes (Montano, et al., 1997).

Table 12 *Research Objectives and Questions Recap by Study Type*

Research Objectives	1				2				3			4			5		6				7	
Research Questions	1	2	3	4	1	2	3	4	1	2	3	1	2	3	1	2	1	2	3	4	1	2
Qualitative Study	X	X	X	X					X	X	X	X	X	X	X	X	X	X			X	
Quanitative Study	X	X	X	X	X	X	X	X	X	X	X				X	X	X		X	X	X	X

The experimental design also measures the relationships between the variables which act as mediators and moderators within the context of shopper value. The balance of this chapter will explore these methods in detail, beginning with the qualitative methods.

SECTION ONE – QUALITATIVE RESEARCH METHODOLOGY

QUALITATIVE RESEARCH STUDY ONE

Qualitative research is designed to explore and explain process, as opposed to variance (Denzin & Lincoln, 2000). The research problem proposed for this study is well suited to this methodology. The qualitative study will enhance our understanding of the shopper and the processes she engages while in pursuit of value optimization. Qualitative research also helps to increase the understanding of a phenomenon which has been little studied (Guba & Lincoln, 1994). This study is a foundational investigation into the experiences and meanings which shoppers ascribe to various aspects of the purchase process. Qualitative methodologies are uniquely configured to derive meaning and purpose from individuals and their experiences (Guba & Lincoln, 1994). These research methods have been identified as usefeul for studying areas which have had little prior investigation, areas which have been widely studied but could benefit from new perspectives, or gain in-depth information which may not be easily measured quantitatively (A. Strauss, L. & J. Corbin, 1998). Therefore shopper value, which has very little prior examination and in some aspects may be difficult to measure quantitatively, is an area of research which is appropriate for the use of qualitative methods.

It is questionable whether existing theory, due to the lack of prior research, adequately describes shopper value. Existing theories related to consumer behavior may be able to describe portions of the shopper value framework (SVF). However, differences between shoppers and consumers indicate that in order to generate a more comprehensive understanding of the process, new research focused on the shopper will need to be undertaken. The qualitative research used in this study is exploratory and provides support and insight into the constructs which comprise the SVF. Through the qualitative exploration, new measures are developed to aid in the investigation of value through a quantitative study, which will be addressed in Part Two of this chapter.

Part One of this chapter addresses qualitative research which used laddering theory and value hierarchy methodology. The research questions associated with this study can be seen as follows:

Research objectives:

1. *Identify differences between shopper and consumer value for:*
    a. *Brand*
    b. *Product*
    c. *Retailer*
    d. *Store location*
3. *The impact of perceived temporal constraints on shopper value.*
4. *The impact of perceived financial constraints shopper value.*
5. *The impact of purchase recipient perception on shopper value.*
6. *The impact of social shopping situation factors (e.g., alone, with another supportive, or with another not supportive) on shopper evaluation of:*
    a. *Retailers*
    b. *Brands*
7. *The impact of perceived need occasion importance on shopper value.*

The research questions which are designed to address these objectives are as follows:

Research objective one examines the following research questions:

1. *Does shopper occasion perception create a value frame for the shopping experience?*
2. *Does the occasion perception value frame, identify for the shopper what she will value, in shopper purchase assessment?*
2. *Is shopper value for an outcome, different from what a consumer would value?*
3. *Will those differences be reflected in:*
    a. *Brand?*
    b. *Product?*
    c. *Retailer?*
    d. *Store Location?*
    e. *All or none of the above*

Research objective three examines the following research questions:

1. *Do genuine temporal constraints alter what the shopper values during the shopping experience?*
2. *Do perceived temporal constraints alter what the shopper values during the shopping experience?*
3. *Is there a difference for the shopper in outcome between genuine or perceived temporal constraints?*

Research objective four examines the following research questions:

1. *Do genuine financial constraints alter what the shopper values during the shopping experience?*
2. *Do perceived financial constraints alter what the shopper values during the shopping experience?*
3. *Is there a difference for the shopper in outcome between genuine or perceived financial constraints?*

Research objective five examines the following research questions:

1. *Does the recipient of a purchase impact value for the shopper?*
2. *How does the shopper's perception of the purchase recipient impact what shopper's value?*

Research objective six examines the following research questions:

1. *How does the alone social shopping situation factor impact what the shopper values?*

Research objective seven will be examined through the following research questions:

1. Does the shopper's perception of the importance of the need occasion impact what they value for the shopping experience?

LADDERING THEORY AND VALUE HIERARCHIES

Laddering theory is grounded in psychology. The laddering process is designed to identify the connections which individuals have developed between attributes. In the case of this research, those attributes are associated with products, brands, retailers, channels, and store locations which help the shopper generate value (Reynolds & Gutman, 1988). The theoretical structure is that "means", which are attributes, generate specific "consequences", which lead to "ends", that the individual values. Again in relation to this research, the attributes are associated with products, brands, retailers, channels and store locations, which lead to ends, which is what the shopper values. This "means-ends" representation of attitude is closely modeled in expectancy-value theory (Rosenberg, 1956). From a shopper perspective, expectancy-value theory indicates the shopper will learn through purchase behavior which outcomes are more favorably associated with desired outcomes. The shopper, given another opportunity, would choose to replicate those behaviors (Rosenberg, 1956).

Similarly, other models have extended the expectancy-value theory through the introduction of mediators most notably the theory of reasoned action (TRA) (Fishbein & Ajzen, 1975). As a precursor to the introduction of TRA, research had indicated that an individual's beliefs are evaluative and inform her attitudes (Fishbein, 1963) The result is that the shopper's attitude is comprised of the strength of the belief, and the sum of her evaluative attitudes which can be represented as:

$$\text{Attitude Toward an Object} = \sum_{i=1}^{N} (B_i a_i)$$

(Fishbein, 1963, p. 233). In both the Rosenberg (1956) and Fishbein (1963) models, the expected attitude value is a function of a summated result of attitude and belief scores. These scores represent a level of importance to the individual. Laddering theory seeks to uncover why the consequences are important and how those consequences impact what the individual values (Reynolds & Gutman, 1988).

Laddering is a technique using one-on-one in-depth interviews, which are designed to elicit from participants the associations they have drawn about attributes which are important to them (Gutman, 1982). The interview is highly directive orienting the participant toward a specific topic of interest. The interviewer having established the topic with the participant begins to hone in on the meaning associated with attributes. The primary question vehicle used is the probe, investigating attribute importance for the participant (Reynolds & Gutman, 1988). The desired result is to move the participant from concrete attributes to more abstract concepts which are tied in some way to what the participant values (Durgee, 1986). The inquiry into a topic ends when further probing elicits no further insight (Brownlow & Watson, 1987).

Attribute and consequence associations ultimately resolve into desired end-states, for which the individual finds value (Gutman, 1982). The laddering technique produces hierarchical frameworks, which are divided into three tiers or categories: Base = attribute (A); Intermediate = consequences (C); End states = values (V) (Reynolds & Gutman, 1988). The hierarchy helps simplify the process of identification of the association

significance between the attribute and the subsequent consequences leading to values (Brownlow & Watson, 1987). During the interview process the questioning can move the participant up or down the hierarchy from base to end states and/or end states to base (Hinkle, 1965). The interviews are parsed into ladder categories A – V, then analyzed for linkages (Reynolds & Gutman, 1988). The resulting hierarchies indicate how individual participants associate attributes with ends they value.

Study One Context

Shopping is an activity which is widely engaged by men and women of virtually all ages (Otnes & McGrath, 2001; Reece, 1986). As such, the context for this study is largely unbounded. While it is of more interest to this study to examine the grocery context, no significant boundaries were placed on the participant regarding the shopping context. The sample was drawn purposefully, which describes virtually all qualitative samples (Patton, 1990). Purposeful samples may exist in three forms; theoretical variation, maximum variation, and phenomenal variation (Sandelowski, 1995). All forms of variation will be examined in this study.

Initial interviews were conducted with three women. All were married, had children, and were experienced shoppers. The initial interviews tended to confirm many original conceptions regarding shopper attribute interactions, particularly product, brand, retailer, and store location. In addition, interactions related to social factors such as the perceived occasion importance, perceived recipient importance, shopping context, and shopping social situation, were also confirmed. As such the context was deemed appropriate for further study.

Sampling and Description of Participants

Participants all indicated their familiarity with grocery shopping and had purchased consumer package goods (CPG) regularly, in-fact within a week of the interviews. The participants were recruited by the researcher and through other researchers from a Ph.D. seminar on consumer behavior. In-person interviews were conducted over a period of several weeks during the fall semester of 2010. All of the participants were recruited based on prior knowledge of the participant and their shopping habits. Care was taken to keep participant interviews in close proximity to the last grocery oriented shopping trip.

Data Collection

The principle form of data collection for laddering theory is the in-depth interview (Reynolds & Gutman, 1988). In-depth interviews are designed to elicit social-psychological details which can be abstracted to a level making the information more generally applicable (Gorden, 1956). The data are placed into value hierarchies demonstrating their connections between attributes, consequences and desired end-states (Durgee, 1986).

Qualitative research interviews reflect similar hallmarks distinguishing them as a unique methodological tool. Twelve aspects in particular highlight this difference:

1. Centered on the interviewee's life-world
2. In search of the meaning of phenomena in his/her life-world
3. Qualitative
4. Descriptive
5. Specific
6. Pre-suppositionless
7. Focused on certain themes
8. Open for ambiguities

9. Open for changes
10. Dependent on the sensitivity of the interviewer
11. Interpersonal interaction
12. A positive experience

(Kvale, 1983, p. 171).

The interviews, conducted with volunteer participants, were face-to-face. All interviews were recorded and transcribed to maintain the integrity of the in-vivo terminology. The use of in-vivo terminology maintains not only the participant's exact words but also their meaning in the context of the entire interview (Strauss, 1987). The interview setting was set by the participant to instill a sense of comfort, confidence and safety allowing for more introspection (Reynolds & Gutman, 1988). The interviews resulted in the uncovering of common emergent patterns. The consistency of findings represents theoretical saturation, which can be described as the point at which no further insights are being made (Strauss & Corbin, 1998).

Data Analysis

Analysis for hierarchical value maps is performed through content analysis, establishing links between the attributes, consequences, and desired end states (Leppard, Russell, & Cox, 2004). Analysis begins with the development of master codes which represent a group of similar responses. The codes are specific to each of the ascending levels of the value hierarchy. Through content analysis, categories are developed which are substantive at the attribute and consequence level. These categories need to be broad enough to encompass all the data, yet not so broad that connections made to the end states, become tenuous (Reynolds & Gutman, 1988). The resulting hierarchy reflects the strength of the connections between the attributes, consequences and the end states. All

possible links are represented, even links between codes at the same hierarchical level (Leppard, et al., 2004).

Evaluative Criteria for Qualitative Research

Qualitative data is assessed according to it trustworthiness (Lincoln & Guba, 1985). Trustworthiness was originally construed to be measured against four criteria: credibility, transferability, dependability, and confirmability (Alkin, Daillak, & White, 1979; Lincoln & Guba, 1985; Miles & Huberman, 1984; Patton, 1990). From grounded theory which is a rigorous methodology often used in theory building, four additional measures can also be examined which enhance the rigor and the trustworthiness of the data: fit, understanding, generality, and control (Corbin & Strauss, 1990; Flint, Woodruff, & Gardial, 2002). Credibility examines the reasonableness that the interpretation of the data offered by the researcher is representative of the study data. Dependability examines the researcher's interpretation of the data such that similar results could be found by other researchers. This would indicate the findings are reflective of the data and not attributable to an individual researcher's bias. Transferability represents a review of the findings that seek to identify if the interpretation of the data has been stringent enough such that it has moved beyond descriptive review and into a theoretical plane, thus making the interpretations suitable for application in alternate contexts. Confirmability is the assessment that the data supports the interpretation and do not unduly demonstrate influence by researcher bias (Hirschman, 1986; Lincoln & Guba, 1985). Fit assesses the findings in relation to the phenomenon studied. Understanding represents an assessment of the findings by participants and others as representative of the data. Generality applies to the findings representing multiple facets of the phenomenon. Control is an examination

of the ability of an organization or individual to influence aspects of the phenomenon (Corbin & Strauss, 1990; Flint, et al., 2002).

The mixed-method research design employed in this study of shoppers is deliberately sequential as opposed to concurrent. The method is designed to use the knowledge gained from the qualitative engagement with shoppers to enhance and inform the quantitative research to follow. Once the qualitative research is completed and trustworthiness examined, the quantitative study can begin.

SECTION TWO – QUANTITATIVE RESEARCH METHODOLOGY

The second study employs a quantitative method. The quantitative research examined the applicability of the SVF for describing the process shoppers engage in and their assessment of value from the shopping experience. The experimental design of the study examines the impact of perceived occasion importance, perceived recipient importance, shopping context, and shopping social situation on shopper outcomes. Changes from consumer value choices, which result from the inclusion of the social and situational factors, are examined through the shopper's purchase solution assessment. The theory of reasoned action provides the theoretical foundation for the model used in the examination of shopper value outcomes. The resulting data was examined using multiple statistical methodologies which will be described later in this chapter.

The study's quantitative approach is designed to measure the impact of social and situational variables on shopper value outcomes. Therefore, the research objectives and

questions which it will seek to answer are as follows: (A recap of these can be found in Table 12 presented earlier in this chapter.)

Research objectives:

1. *Identify differences between shopper and consumer value for:*
   a. *Brand*
   b. *Product*
   c. *Retailer*
   d. *Store location*
2. *Identify differential importance weighting points during the shopping process for:*
   a. *Brand*
   b. *Retailer*
3. *The impact of perceived time constraints on shopper value.*
5. *The impact of purchase recipient perception on shopper value.*
6. *The impact of social shopping situation factors (e.g., alone, with another supportive, or with another not supportive) on shopper evaluation of:*
   a. *Retailers*
   b. *Brands*
7. *The impact of perceived need occasion importance on shopper value.*

The research questions which are designed to address these objectives are as follows:

Research objective one examines the following research questions:

1. *Does shopper occasion perception create a value frame for the shopping experience?*
2. *Does the occasion perception value frame, identify for the shopper what she will value, in shopper purchase assessment?*
3. *Is the shopper value for an outcome different from what a consumer would value?*
4. *Will those differences be reflected in:*
   a. *Brand?*
   b. *Product?*
   c. *Retailer?*
   d. *Store Location?*
   e. *All or none of the above*

Research objective two examines the following research questions:

1. *Are there points within the SVF where brands are more important to the shopper than the retailer?*
2. *Are there points within the SVF where retailers are more important to the shopper than brands?*

3. *Are those points important enough to alter what the shopper values for the shopping experience?*
4. *Are those points important enough to alter shopper behavior?*

Research objective three examines the following research questions:

1. *Do genuine temporal constraints alter what the shopper values during the shopping experience?*
2. *Do perceived temporal constraints alter what the shopper values during the shopping experience?*
3. *Is there a difference for the shopper in outcome between genuine or perceived temporal constraints?*

Research objective five examines the following research questions:

1. *Does the recipient of a purchase impact value for the shopper?*
2. *How does the shopper's perception of the purchase recipient impact what shopper's value?*

Research objective six examines the following research questions:

1. *How does the alone social shopping situation factor impact what shopper value?*
3. *How does the with another non-supportive social shopping situation factor impact what shopper value?*
4. *Do social shopping situation factors impact what shopper value for;*
   a. *Retailers?*
   b. *Store Locations?*
   c. *Brands?*
   d. *Products?*

Research objective seven examines the following research questions:

1. *Does shopper perception of the importance of the need occasion impact what they value for the shopping experience?*
2. *Does shopper perception of the importance of the need occasion impact how the shopper values:*
   c. *Retailers?*
   d. *Brands?*

In preparation for an examination of the quantitative model, a brief review of the theory of reasoned action is provided.

Theory of Reasoned Action

The theory of reasoned action (TRA) (Fishbein & Ajzen, 1975) has been described as a durable predictor of consumer intentions (Sheppard, Hartwick, & Warshaw, 1988). It also offers insight into how and where impacts to intention change can occur (Sheppard, et al., 1988). TRA's focus on the impact of beliefs on attitudes and intentions toward behavior makes it particularly appropriate for this examination into changes from consumer beliefs to shopper intentions.

The most reliable measurement of an intention for use in predicting future behavior is a measurement performed as close to the time the actual behavior is to be engaged. This helps to reduce or eliminate any impact of intervening events which may alter intentions (Fishbein & Ajzen, 1975). This research uses an experimental design to actively engage participants in the process of preference selection in the execution of a proscribed purchase need. Intentions are more stable when they relate to specific behaviors (Fishbein & Ajzen, 1975). The survey format and the experimental design provide the necessary specific contextual confines for the participants to influence their intentions toward a specific shopping behavior. This allows for the careful examination of the participants beliefs on their attitude resulting in their stated intentions.

The TRA Model Revisited

The SVF, presented in chapter two, follows the traditional TRA model. The research model measures beliefs (TRA) as consumer brand and retail belief profile and occasion perception, to represent need occasion (SVF). Beliefs represented by need

occasion are mediated by attitudes (TRA) found in shopper occasion perception (SVF), which the research model represents as shopper purchase need assessment. Attitudes influence intentions (TRA) which are measured in the research model as shopper purchase solution assessment which represent shopper targeting in the SVF. The changes in importance reflected in shopper purchase assessment, from the consumer belief profile, serves as an indicator of the change in value due to the experimental manipulation which the shopper developed for the specific occasion.

The research model extends the Fishbein and Ajzen (1975) TRA model to the specifics of the immediate shopping situation as well as the inclusion of shopping social factors. TRA acknowledges intentions become less reliable as the temporal distance to action increases. Additionally, lack of target action specificity can also reduce the predictive reliability toward behavioral engagement (Fishbein & Ajzen, 1975). The present research seeks to increase reliability through the use of the shopper context and the temporal proximity to solution generation. Further, it has been noted that TRA lacks sufficient ability to manage alternative selections (Sheppard, et al., 1988). The focus of this research into shoppers is specifically designed to examine alternative selections in two ways: (1) shifting from consumer beliefs to the alternative shopper purchase solution intentions and (2) the introduction of a social shopping moderator introducing the opportunity for further alternative selections.

An important element of the shopper model to both the academy and industry is the value of prediction. It is proposed that need occasion is tightly bound contextually, which makes for a more complex prediction problem than that used in more generalized

consumer intention (Jones, 2011). However, the shopper model is value based, therefore given a similar set of context dimensions, certain predictions should become more reliable and further increase as the repetition of the behavior increases (Charng, Piliavin, & Callero, 1988).

Study Focus

This study addresses the impact of perceived occasion importance, perceived recipient importance, shopping context and shopping social situation on shopper value outcomes. The study specifically addresses gaps identified by Jolson and Spath (1973) and Westbrook and Black (1985), as well as others, regarding motivational and situational factors and their impact on shoppers.

Variables, Measures and Hypotheses

Independent Variables

The first two constructs within the model represent aspects which together form a measurable construct which represent need occasion from the SVF. Need occasion is the initiation point of the SVF, and contains the consumer pre-disposition which the shopper brings to the shopping occasion. The first construct related to need occasion in the quantitative model is the consumer retail/brand belief profile. The SVF assumes that the shopper, regardless of the activity, brings to the shopping need a set of consumer beliefs which she has developed over time (R. Belk, 1988). The consumer belief profile reflects the participant's beliefs toward the shopping purchase need which she brings to the shopping situation, and is described as:

> *Consumer Belief Profile:* Is a multi-dimensional construct, comprised of the consumer's beliefs toward brands, products, retailers, and store locations. These

> beliefs represent the sum of the consumer's experiences with particular brands, products, retailers, and store locations. These experiences may be actual, second hand (word-of-mouth) or perceived as a result of communications which the consumer received in reference to brands, products, retailers, and store locations.

The second construct related to need occasion in the quantitative model, occasion perception, represents the five remaining sub-dimensions of need occasion from the SVF. Need occasion, in addition to consumer beliefs related to the product, includes the beliefs the shopper has similarly generated over time and experience toward various aspects of the occasion including urgency, importance, people, product and environment (R. W. Belk, 1975). The construct is described further:

> *Occasion Perception.* Is a multi-dimensional construct comprised of two belief sets: the first is the shopper's beliefs toward importance and the second represents her normative beliefs regarding the occasion itself. The beliefs are engaged through the shopper's recognition of the occasion. The beliefs which comprise occasion perception are represented by three sub-constructs: perceived product/service importance, perceived occasion importance, perceived recipient importance, occasion urgency, and occasion assessment. The shopper, through these sub-constructs, frames her beliefs toward the need and the occasion which help define the shopper's attitude toward an appropriate solution.
>
> The three importance sub-constructs (product/service, occasion, and recipient) represent the shopper's assessment of how important these elements are to her. Importance is gauged through the familiarity the shopper has with the product/service, occasion, and recipient, specified for the occasion. The more certain she is about her beliefs of importance the more clearly she can set her attitudes toward the purchase solution. Lack of familiarity reduces this certitude making predictions of the behavioral outcome less reliable. The final two sub-constructs represent the normative beliefs toward the event for the shopper.
>
> *Occasion Urgency.* Is dimensionally oriented toward spatial and temporal beliefs the shopper has toward the occasion. Urgency is driven by the event type and the shopper's event perception. Closely tied to occasion importance, shopper assessment impacts how she perceives urgency toward the event.
>
> *Occasion Assessment*. Is the shopper's overall assessment of the occasion environment. This construct measures the shoppers beliefs toward when the

occasion will occur, its duration, who else is involved in the occasion and the location of the environment.

The third construct in the research model, shopper purchase need assessment, is a measurable construct which represents the second stage of the SVF, shopper occasion perception. Shopper occasion perception represents the shopper's attitudes and subjective norms related to the occasion and product (Fishbein & Ajzen, 1975). This construct is comprised of four sub-constructs which together represent the shopper's attitude toward the product/service need, her motivation to purchase, her role and the subjective norms toward the product/service need. These are described further:

Shopper Purchase Need Assessment. Is a multi-dimensional construct which is reflected in four sub-constructs. Together, they comprise the shopper's evaluation of how she sees herself within the confines of the occasion, which generated the shopping need. The four sub-constructs for shopper purchase need assessment are: motivation toward purchase, perceived occasion role, product/service perception, and product subjective norms. These elements represent the shopper's attitudes, based on the beliefs from need occasion, toward the purchase need. These attitudes will help define her intentions toward the completion of the shopping required to fulfill the product/service need found in the final construct of the quantitative model.

Motivation Toward Purchase. Represents the shoppers attitudes toward fulfilling the requirements of the product needed for the occasion. This reflects the shopper's attitudes toward not only the product, but the shopping required and the importance of the recipient and the occasion.

Perceived Occasion Role. Represents the shopper's attitude toward her role as she perceives it, for the occasion. Reflected in this is her perception of her importance in the occasion as well as the importance to her of the occasion itself.

Product/Service Perception. Is the shopper's attitude toward the product/service need. This represents how important she feels the product is to her as well as the occasion.

Product Subjective Norms. Represents the shopper's perception of the subjective norms related to the product/service. In particular, how those norms fit within the context of the occasion. The subjective norms reflect how the shopper views the

social rules which guide the selection of a product which has been stipulated for the occasion.

Hypotheses Related to the Independent Variables

The SVF proposes that a consumer lacking a specific shopping need has a set of beliefs (consumer retail/brand belief profile) which influence attitudes toward products, brands, retailers and store locations (Bliss, 1960). Those somewhat "generic" attitudes along with the designation of a specific need occasion impact how the shopper perceives the shopping occasion. The specificity of the occasion may function to alter the mix of store location, retailer, brand and/or product to better suit the occasion (Westbrook & Black, 1985). The result based on the occasion specifics would be a value optimized solution for the shopper. Therefore based on these predications the following hypotheses are offered:

H_1: Consumer retailer/brand belief profile maintains particular attitudes about brands, products, retailers and store locations which positively influence her attitudes in the shopper need occasion assessment.

H_2: Occasion perception positively impacts the shopper purchase need assessment through the introduction of occasion specific and normative beliefs toward the shopping need required for a specific event.

(Note: the hypotheses are re-numbered in Chapter 4 to better reflect the model)

To test these relationships, the participant's responded scales which relate to their specific beliefs regarding brands, products, retailers and store locations. Participants were given a scenario which describes their participation in a specific occasion. A series of questions asking them to reflect on their perception of the occasion using dimensional scales items then followed.

Dependent Variable

The dependent variable, shopper purchase solution assessment, represents the shopper targeting stage of the SVF. During this stage the shopper's attitudes toward the occasion and product/service need are evaluated against what she perceives to be achievable solutions (R. M. Cunningham, 1956). Through this evaluation she forms her intentions toward a purchase solution which would include factors related to the product, brand, retailer and store location. Shopper purchase solution assessment is comprised of four sub-constructs which reflect her intention toward the purchase solution and can be described as:

> *Shopper Purchase Solution Assessment.* Reflects the outcome preferences the shopper has toward fulfilling her shopping need. Based on the shopper's attitudes from shopper purchase need assessment the shopper forms intentions to purchase which optimize her value. The shopper purchase solution assessment is a multi-dimensional construct composed of the shopper's assessment of (1) products, (2) brands, (3) retailers, and (4) store locations. These assessments reflect the shopper's evaluation of the purchase solution variable which would best optimize her value for the shopping experience. Her perceived optimal shopper solution (intentions), reflects her beliefs mediated by her attitudes. This may result in the shopper assigning weight to the importance of products, brands, retailers, store locations, individually or in any combination, differently from her beliefs she held as a consumer.

Hypotheses Related to the Dependent Variable

The differences between the intention weighting found in the shopper purchase solution assessment and her belief weighting from the consumer belief profile would indicate value optimization based on the occasion reshapes her valuing to best suit the occasion (Flint, 2006). Therefore the following hypothesis is offered:

> H_3: Shopper purchase need assessment reflecting the shopper's motivation, role, perceptions of the product/service and subjective norms will positively impact shopper purchase solution assessment.

Hypotheses for a Direct Effect from Independent Variable on the Dependent Variable

Consumer beliefs toward products, brands, retailers, channels, and store locations have been shown to be strong. When described as loyalty, no amount of intervening will disturb the relationship (Ailawadi, et al., 2008). Under the loyalty condition it is possible that none of the occasion parameters, social norms or social shopping situation alone or in combination would have any impact on the shopper purchase solution. Therefore the following hypothesis is offered:

> H_4: Consumer retailer/brand belief profile in some circumstances may be so deeply imbedded and have such a significant impact on the solution set that no amount of occasion, context or social situation will alter the shopper's assessment of the purchase solution.

Moderator Variables

Social situation is hypothesized to have a significant impact on the relationship between the shopping occasion perception and the shopper purchase solution (R. W. Belk, 1975; Machleit & Eroglu, 2000). These moderators may come in two forms, the shopping context and the social situation. These moderators can be described as:

Shopping context. Shopping context relates to the type of shopping trip which is being undertaken. For the purposes of this study, using industry standard terminology for shopper marketing, there is one shopping context, quick fill-in (Schober, et al., 2011). Quick fill-in refers to a shopping trip triggered by a suddenly recognition of a purchase need. The time parameter associated with the occasion make purchase of the item urgent. The result is often a shopping trip for a limited selection perhaps a single item.

Shopping Social Situation. Refers to the social norms which may be introduced by others into the environment of the shopper (Fishbein & Ajzen, 1980). For the purposes of this research the shopping social situation has two variants. Self; refers to the shopper undertaking the shopping trip alone. Not-supportive; refers to the shopper engaging the shopping trip with another individual(s) who does not support the way the shopper behaves within the shopping environment, or does not support the products which are being purchased. The support context results in the shopper being either encouraged or discouraged in their original purchase pursuit.

Hypotheses Related to the Moderating Variables

Encouragement in this study can be seen to reinforce the behavior or product purchase which would reinforce the primary solution for the shopper whether it is the retailer/store location solution or the brand/product solution (Batra, et al., 2001). The not-supportive scenario would discourage the shopper from their preferred solution having them seek a sub-optimal solution which minimizes conflict with others (Batra, et al., 2001). Importance associated with either or both recipient and occasion will impact the shopper solution outcome. It is proposed that occasion importance will drive a connection to prior experience as a heuristic for past performance (Sorrentino, et al., 1988). However, when importance is high for both recipient and occasion and the social situation is not-supportive, the increase in perceived risk by the shopper will reduce the use of heuristics and press the shopper to be evaluative in their solution set (Sorrentino, et al., 1988). Therefore, based on the literature we can propose the following hypotheses in order to test these variables moderation impact within the model. Moderation will be examined through two different relationships. First, is a linear relationship between the

dependent variable (DV) shopper purchase solution assessment (SPSA) and the independent variables (IV) in consumer retailer/brand profile (CRBP). The second relationship is a within group means difference between the sub-constructs related to the DV and IV, which can be paired along related foci. The following hypotheses represent these dual investigations and the proposed outcomes. Hypothesis H_{5a}, for clarity, details the cell treatment description, linear relationship elements and proposed outcome, followed by the within group elements description and proposed outcome. The remainder of the hypotheses will be tested as in H_{5a}, however, for brevity, will only describe the treatment and hypothesized relationship outcomes.

H_{5a}: For treatment cell 1 (shopping context is quick fill-in, shopping social situation is **alone,** occasion perception is **un**important, and recipient importance perception is **un**important), the independent variable (IV), consumer retailer/brand profile, will **not** be a significant predictor of the dependent variable (DV), shopper purchase solution assessment, and the sub-constructs within consumer retailer/brand profile (CRBP) and shopper purchase solution assessment (SPSA) when paired (e.g., brand, from consumer retailer/brand profile and brand, from shopper purchase solution assessment, similarly for the remaining sub-constructs, product with product, retailer with retailer, and location with location) **will** demonstrate significant differences between sub-construct means.

H_{5b}: For treatment cell 2 (shopping social situation is **alone,** occasion perception is **un**important, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{5c}: For treatment cell 3 (shopping social situation is **alone,** occasion perception **is im**portant, and recipient importance is **un**important) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{5d}: For treatment cell 4 (shopping social situation is **alone,** occasion perception is **im**portant, and recipient importance is **im**portant) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{6a}: For treatment cell 5 (shopping social situation is **with another** not-supportive, occasion perception is **un**important, and recipient importance is **un**important), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{6b}: For treatment cell 6 (shopping social situation is **with another** not-supportive, occasion perception is **un**important, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{6c}: For treatment cell 7 (shopping social situation is **with another** not-supportive, occasion perception is **im**portant, and recipient importance is **unim**portant) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{6d}: For treatment cell 8 (shopping social situation is **with another** not-supportive, occasion perception is **im**portant, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

Analysis

The quantitative model is comprised of four main constructs which represent the SVF from need occasion to shopper targeting. The experimental design and on-line survey methodology used do not allow the participant to move to shopper experiencing. However, the DV, shopper purchase solution assessment, in combination with consumer retailer/brand profile can serve as an indicator of the value change from consumer to shopper (Flint, 2006). Therefore, the proposed quantitative model will function as test for the applicability of the SVF in representing the process the shopper engages toward value optimization for the shopping experience. The hypotheses offered allow for further examination not only of the main effects but also the impact of the moderating effects on shopper value.

The hypothesis testing was performed using a variety of statistical methods. Hypotheses H_{5a-d} and H_{6a-d} were examined using a series of linear regressions and analysis of variance tests (ANOVA), using PASW 18 statistical software. The regressions demonstrated the significance of consumer belief profile on the shopper purchase solution assessment. The ANOVA's were used to test for the main and the interaction effects indicating the level of mean differences between the consumer belief profile and the shopper purchase solution assessment. As is necessary with all linear statistical models, three assumptions regarding the applicability of the data for evaluation must be met, which are: approximately normal distribution, independence, and approximately equal variance (Freedman, 2005). The experimental design is comprised of eight scenario's representing various combinations of occasion and recipient importance along with shopping social situations. Each scenario results in a cell to be populated with roughly equivalent participant counts. The equivalent cell populations reduce correlations during analysis and insure orthogonality (Freedman, 2005). Interaction effects will be tested for Type-I error using a Tukey test (Williams, Jones, & Tukey, 1999).

The main model hypotheses H_1 - H_4 were examined using AMOS Graphics 18 statistical software through structural equation modeling (SEM). The quantitative model including hypotheses can be found in its simple form in Figure 11. The quantitative model including the sub-constructs and hypotheses can be found in Figure 12.

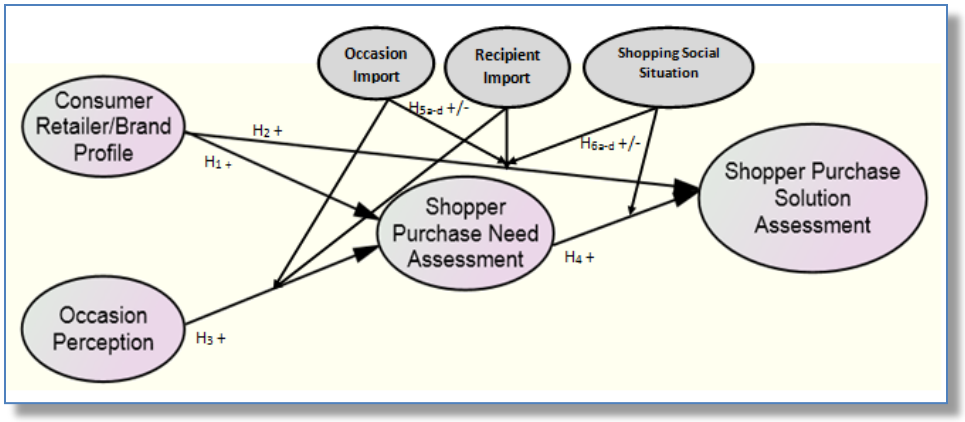


Figure 11. Proposed Experimental Design Research Model

Experimental Design and Sample Size

For the purposes of this research, controlled scenario's representing both independent and moderating variables requires an experimental design. The independent variable of consumer retailer/brand belief profile is examined through a series of questions regarding shopping beliefs for brand(s), product(s), retailer(s), and store location(s) which precede the introduction of the scenarios containing the experimental manipulations. The independent variable of occasion perception is represented in the scenarios through the description of the occasion which specifies when it will occur, what product is needed, and a generalized description of the environment. The event is specified to occur tomorrow and the occasion is described as either a meeting or a gathering. Shopping is specified as quick fill-in.

The moderating variables are shopping social situation, recipient importance and occasion importance. Shopping social situation is represented in the scenario with a specification of an alone condition or with-friend. The with-friend scenario is not-supportive. The recipient importance is manipulated through an indication of relationship

longevity and friendship moving from unimportant to important. The occasion importance is demonstrated through either a meeting or gathering with the outcome or prior history serving as indicators of importance ranging from unimportant to important.

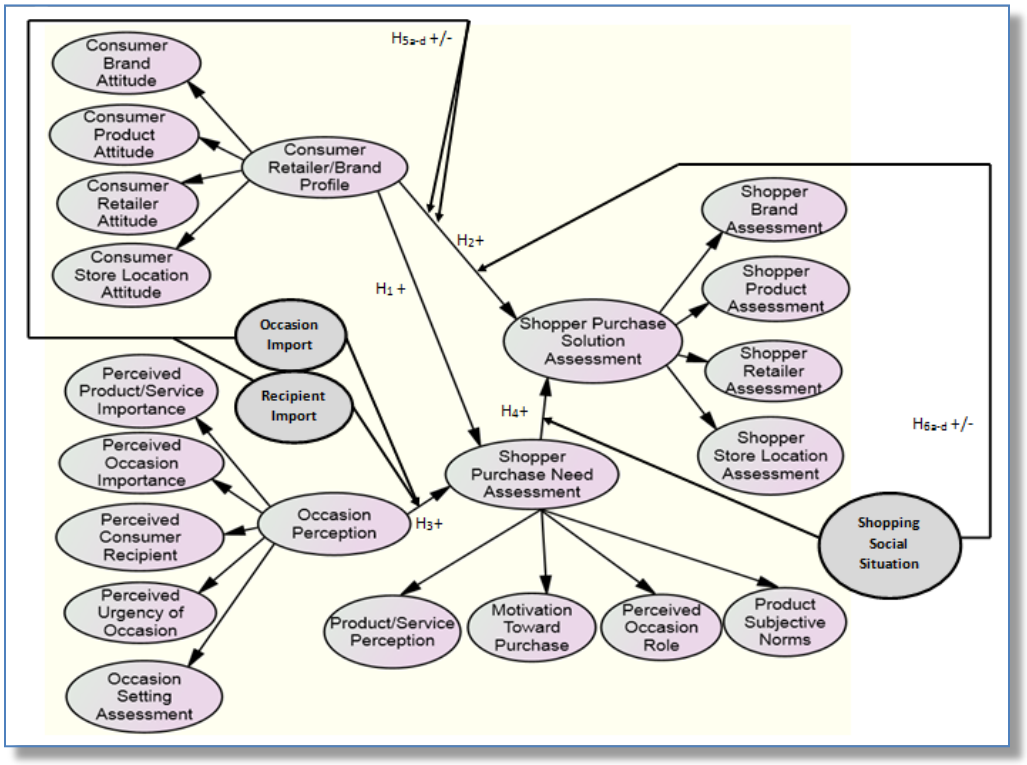


Figure 12. Proposed Experimental Design Research Model Sub-Construct Exposition

The psychometric scale items related to the consumer beliefs profile having been delivered in advance of the scenario, express loyalty beliefs held by the participant toward products, brands, retailers, and stores (Bliss, 1960). Through the structure of the questions, the participant will be lead from general responses to specific responses associated with salty snack purchases. This is critical for the development of the specificity needed to drive intentions toward purchase behavior. The incorporation of the

scenario manipulations are designed to further add to the level of specificity required for a shopper to form intentions toward the purchase solution (Fishbein & Ajzen, 2010).

To measure the results of these manipulations, a series of statistical examinations of the data were undertaken. First, to test for the overall model constructs fit to the data as representative of the SVF a measurement model was examined. With sufficient fit having been demonstrated at the measurement level, a structural equation model was examined, testing the relationships between the constructs within the model. Next, 2x2x2 within subject design, comprised therefore of eight cells, was examined to test for the differences between the consumer beliefs and shopper's intention due to the manipulations. The structure reflects: the occasion; *important, unimportant*; recipient; *important, unimportant*; social shopping situation; alone, with-other not-supportive. The first examination comprised a series of regression models fit against each of the cells measuring the significance of the consumer beliefs on the shopper intentions by cell. Next, a series of ANOVA's examined the differences in means between consumer beliefs and shopper intentions by cell. This was followed by a series of ANOVA's examining the differences in means between consumer beliefs and shopper intentions by importance perceived by the participants. Finally, a set of ANOVA's examined the differences in means between consumer beliefs and shopper intentions by shopping social situation.

Minimum participant count per cell for a medium effect size is recommended at 30 and a minimum of 50 recommended for correlational analysis (J. Cohen, 1988). This recommended sample range sets a participant target range between 240 and 400 participants; however for the purposes of SEM, a target of 500 is preferred.

Manipulation Checks and Pre-test

The experimental design relies on a participant being cognizant of the manipulation which is embedded in their given scenarios (Kidd, 1976). The study examined four manipulations relating to perceived recipient importance, perceived occasion importance, and shopping social situation. Both perceived recipient and occasion importance were checked using a question measuring importance as either *unimportant to important*. Shopping social situation was checked first with a question measuring the social context of the shopping trip as either; *self (alone), or with-others*. The second check on shopping social situation measured those in the, with-other group only, as either; *supportive, or not-supportive*. The effectiveness of the manipulations was measured using t-tests to measure the statistical significance of difference between the groups. Manipulations were deemed effective with the resulting t-tests returning a significance value of 0.05 ($p > 0.05$).

A pre-test was undertaken to evaluate the understandability, ease of use and reliability and validity of the final measures and the overall experimental instrument (Dillman, 2007). The pre-test was undertaken using participants from both student categories, undergraduate and graduate, as well as faculty levels. Pretests provided the necessary data with which to assess the initial validity and reliability of scale items (Dillman, 2007). Scale items used in this research are comprised of previously operationalized scales, which have been adapted to the shopping context, and new scales created for the study. The scale items were tested using Cronbach's alpha for reliability were $\alpha \geq 0.700$, indicates a reliable measure (Nunnally & Bernstein, 1994). Factor loading of the scale item to their identified construct was examined using confirmatory

factor analysis (CFA). Individual indicators were examined for standardized estimates SE $\geq$ 0.40 indicating acceptable loading on the factor (Byrne, 2010).

Procedures

Participant sample and recruitment

Participants for the pre-tests were generated from undergraduate and graduate students and faculty who volunteer to take the on-line study. The final study consisted of volunteer members of an on-line consumer panel. Selection criteria included; age (18 to 45), prior purchase history with salty snacks, even distribution of gender and best representation of race. Salty snacks comprised the pretext for the shopping trips described in the scenarios, therefore recent purchase experience with salty snacks is also necessary. Participants received an incentive for participation which was determined by and paid by the provider as part of the survey cost.

Survey delivery method

The study was administered to participants using on-line survey technology. This sampling method provides many benefits to both the participant and the researcher. On-line sampling allows for nationwide sampling helping to increase generalizability (Best, Krueger, Hubbard, & Smith, 2001). On-line survey delivery also insures that there is no insertion of researcher bias into the results through direct interaction with the participant (Duffy, Smith, Terhanian, & Bremer, 2005). On-line delivery allows technology to manage the randomization for delivery of the scenarios, scale item and sub-construct order, minimizing order bias (Evans & Mathur, 2005). Participants gain from the convenience of on-line survey delivery allowing them to take the survey at a time of their choosing (Evans & Mathur, 2005). The convenience reduces sample bias do to location

specific sampling, or discomfort from a laboratory setting. Convenience also allows the participant to respond to questions absent of any sense of time scarcity which may cause the participant to gloss over questions or answer in a pattern regardless of the question (Evans & Mathur, 2005).

The study contract with the on-line provider further benefits the research through the inclusion of complete surveys in the data set. Missing data in surveys results in their rejection. Additionally, the cells will be filled according to the requirements pre-specified related to gender, age, location, and race. Following the sampling period the study benefits from additional advantages of the on-line delivery. The results of the survey are delivered in a pre-formatted data set which is immediately available for analysis. This method of delivery seamlessly moves the participant response data set to the researcher's data set thus reducing errors which can be inserted through the data entry process.

On-line surveys do suffer some drawbacks generally related to the sampling frame generation. Issues center on access, membership of groups or to panels and access to participant information to assess the validity of the on-line statements (Wright, 2005). While these issues have some validity, the increase in access in the US is now over 75% (Internet World Stats, 2011). The inclusion in this research of multiple panels should further reduce the introduction of any bias related to the sample.

Participant survey experience

Participants were all members of consumer survey panels such as Toluna, World Wide Panel, E-Rewards. Members who wished to participate were directed to a survey specific uniform resource locator (URL), where they received a brief overview of the

general survey goals. Care was taken to not indicate any direction to the participant which might have telegraphed a method of response which the researcher might have preferred. During the overview the researcher and the university were identified. Participants were then given the opportunity to review informed consent disclosures or opt for the existing panel disclosure available to members. Participants then received a brief description of the survey, risk and benefit disclosure, withdrawal penalties if any, and confidentiality measures. Contact information for the researchers was provided and an acceptance of the terms was required.

The participant received a short list of questions related to recent salty snack purchases and certain demographics (location, race and age), which served first as screening questions and second to assist with cell assignment. With this completed, the participant was directed to move through several screens seeking their perceptions regarding their beliefs about salty snack brands, products, retailers, and store locations. These were followed by the introduction of a randomly selected scenario which represents one of the eight cells for study. The participant was then asked to respond to questions related to the occasion perception, and shopping purchase need assessment. The participants were then given a manipulation check followed by screens related to the dependent variable shopper purchase solution assessment. With these completed, the participant was directed to respond to a set of general demographic questions to measure the variation within the sample and to further test along demographic lines. The survey concluded with an acknowledgement of thanks for their participation in the survey. The incentive was reiterated along with a notice of how and when it will be delivered.

Mixed-method design summary

This research employed a mixed-method design approach. The objective of this approach was to build theory related to the shopper value through rigorous evaluation of participant data. This research also used a sequential approach allowing the information gathered during the qualitative study to inform the quantitative study. The quantitative approach is designed to demonstrate the impact of social and situational factors on shopper value through a rigorous experimental design and robust statistical analysis. The combination of these two approaches is designed to form a more holistic understanding of shopper value through the integration of theory and value change in action. Mixed-method approaches to research are not designed to test the validity of one approach against the other. Rather, the rigor with which each methodology is undertaken establishes its own value and can support understanding in future research.

Chapter Three Summary

Chapter three details the methodology for the studies which comprise this research. These methods include both qualitative and quantitative using experimental design and on-line delivery. Within the methods discussion, the research questions and the objectives of the studies were examined. The qualitative study examined the SVF from a social, temporal and financial perspective. The quantitative study examined the SVF and the impact of situational and social factors on value assessment. Procedures for gathering data for each study were discussed along with the procedures for the analysis of data.

CHAPTER FOUR – STUDIES

QUALITATIVE STUDY

What do Shoppers Value: An Exploration Using Value Laddering

ABSTRACT

This research reports on qualitative data collected in an effort to better understand what shopper's value and how their valuing process contributes to their purchase solution. It has been proposed that all shoppers begin their shopping experience with a targeted solution in mind. Shoppers create unique purchase solutions designed to fit the need occasion driving their purchase need. Need occasion frames her shopping solution through which she will attempt to optimize value for the shopping experience. The study engages a value laddering technique to identify attributes and consequences for shoppers attached to specific value outcomes. Six primary value themes with thirteen closely aligned sub-themes emerge from the data. The primary value themes, while consistent in their definition, can be arrived at from a variety of sub-themes, consequences and attributes whose combination is unique to each participant. The specific path taken by each shopper toward a value theme(s) highlights how fixed categorization of shoppers by higher order value themes can lead to inappropriate and misleading conclusions. A detailed explication of the value themes, their development and connection to relevant sub-themes is presented. A discussion of the implications for branded product marketers and retailers, along with future opportunities for research follows.

Introduction

The consumer behavior literature contains many references to value, often describing it as a formulaic expression of retained residual value, once the acquisition costs have been accounted for (Zeithaml, 1988). However, value has also been construed from other perspectives such as values (Rokeach, 1973), to lifetime value (Blattberg & Deighton, 1996). Additionally, and for the purposes of this research, value has also been described as a dynamic process of valuing, which best represents the orientation of this research. Valuing allows individual's through continual assessment to increase and/or decrease their estimate of value, (Flint, 2006).

The evolutionary ability of valuing provides many benefits for the shopper, which static interpretations of value cannot. The literature for consumers and shoppers are largely at odds with a value conceptualization which can change its estimation in either a positive or negative direction. The literature instead tends to focus on static conventions where orientation toward value are fixed (Anderson, et al., 1992; Golob, Lah, & Jančič, 2008; M. Holbrook, 2002; Kim, et al., 2006; Rokeach, 1973; Zeithaml, 1988). This convention leads to a considerable focus in the literature on the creation of fixed archetypes of consumers (shoppers) (Mills, 1983; Stone, 1954; Westbrook, 1987). Unfortunately, shoppers, unlike consumers, are not fixed in their approach to purchase solutions (Bliss, 1960). Therefore, the static approach fails to allow for the active environment of the shopping experience.

The presupposed stability of consumer's value orientation benefits retailers and brands, as it allows for categorization suitable for segmentation. Segmentation allows for

predictability leading to uniform messaging and market size determination (Yim & Kannan, 1999). The categorical approach when applied to shoppers however, introduces a level of error, reducing predictability, which can result in inaccurate and worse inappropriate messaging. Further, the lack of predictability dramatically reduces the ability to estimate market size. The lack of nuance in the understanding of the shopper is largely due to a dearth of foundational research. In order to provide more foundation into shopper understanding, exploratory research needs to be undertaken. This research explores shopper responses to a variety of stimuli in the shopping experience. The shopping experience, often called the "path to purchase" (Schober, et al., 2011), spans from the point an initial purchase solution is targeted (through the selection of brands, products, retailers, channel and store locations), to the retail environment including people she may engage, ending with the point of purchase. The shopper's response to these stimuli clarifies how she seeks to optimize value. Further, shoppers, having been identified as distinct from consumers, require a decision framework reflecting the process she engages toward purchase solutions. Both, of which are as yet unexplored in the literature.

Shopper's, like many areas which are little understood in the literature, are best suited to an examination using qualitative research methodology (Patton, 1990). Therefore, shoppers and shopper value both lacking sufficient support in the literature will be examined utilizing a qualitative approach through value laddering. This methodology allows for the examination of shoppers perspective of value. Attributes and

consequences which lead to what the shopper's value, will be explored with particular emphasis on how they may differ from those valuations she may hold as a consumer.

The remainder of the paper is organized in the following manner. First, a brief review of literature related to consumers, shoppers and value will be presented. Next, the qualitative method, value laddering, will be presented, followed by a discussion of data gathering, and analysis. The themes and sub-themes which emerge from the analysis will be presented along with support from the appropriate literature. The paper will conclude with implications for retail and brand managers, followed by suggestions for future research.

Literature Review

Shoppers Vis-à-vis Consumers

Shopper descriptions can be found in the literature of many disciplines, but the dominant domains are marketing and consumer behavior. Shoppers in the literature are largely discussed according to a marketing priority of segmentation (Sheth, 1967). The segments are designed to identify, then quantify shopper segments, for the purposes of market volume and marketing resource allocation (Kim, et al., 2006). The commonalities between shoppers and consumers is widely acknowledged in the literature, including holding beliefs towards products, brands, retailers, store locations, and others (R. W. Belk, 1975; Bliss, 1960; Jolson & Spath, 1973; Myers & Nicosia, 1968; Nicosia, 1966; Westbrook & Black, 1985). However, what is critical to identify is where shoppers and consumers differ.

The first reference in the literature referring to shoppers describes a typology having four orientations; economic, personalizing, ethical and apathetic (Stone, 1954). The first identified divergence between shoppers and consumers notes that shoppers, unlike consumers, are actively engaged in purchasing (Bliss, 1960). Engagement in the act of purchasing introduces the second element which further differentiates shoppers from consumers (Jolson & Spath, 1973). Shoppers can be further distinguished through the influence of external elements (e.g., retailer) (Jolson & Spath, 1973). This finding leads to a stream in the literature devoted to the impact of sales channel examining a variety of enviornments including; in-store, direct to consumer, catalog, telephone, and in home (including television and online) (Boone, et al., 1974; Childers, et al., 2001; Cunningham & Cunningham, 1973; Gillett, 1976; Matzler, Pichler, Füller, & Mooradian, 2011).

In addition to the channel investigation, shopper typologies continue to be a main focus of research explored in the literature. However, a more nuanced approach to the shopper is introduced, based not on shopping style or categories, but on her motivation (Westbrook & Black, 1985). The authors posit a set of seven shopper motivations; anticipated purchase utility, economic shopping role, negotiation of price concessions, product choice maximization, affiliation with in-groups, power in the marketplace, and sensory stimulation of the marketplace, as the drivers of shopper behavior (Westbrook & Black, 1985). The introduction of motivation, based in part on situation, is a significant shift in the literature. Conceptualizing that shoppers are moved by intrinsic motivation introduces dynamism into shopper understanding. This represents a completely different

view of the shopper from the static consumer based typologies. The dynamic shopper, by definition, reacts to the specifics surrounding the purchase need, in order to identify salient motivations for the shopping required. She then must evaluate attributes, which are specific to the occasion driving the purchase need. Those attributes have corresponding consequences. As this shopper exists within a dynamic environment, all of those evaluations are subject to constant change (Woodruff & Gardial, 1996).

The constant change in the shopper's purchasing environment supports an active orientation toward value. Interpretations of the purchase need occasion by the shopper influences what attributes, leading to which consequences, she prioritizes. These elements are evaluated according to her higher order values, needs, wants, and desires, for the particular occasion. These occasion specific valuations by the shopper are foundational to the identification of an appropriate target product solution set (Woodruff & Gardial, 1996). However, the dynamism which exists in her environment may require the purchase solution to be re-evaluated many times, as change causes attributes to either increase or decrease in value (Flint, 2006). The literature therefore supports the distinction of shoppers vis-a-vis consumers in five significant ways: actively engaged in a purchase solution, external elements (such as retailer's) are important, clear product definition, situationally motivated, and responsive to a highly dynamic environment. Any of these differences, once encountered along her path to purchase may force the shopper to alter their value schema to fit her new shopping reality. In order to more fully understand how these elements, unique to the shopper, impact value assessment, we explore value in the literature, from both the static and active perspectives.

Value

Value exists within the consumer literature in a variety of different conceptualizations. Customer lifetime value appraises the expected value of the customer to the firm over the lifetime of the customer/firm relationship (Blattberg & Deighton, 1996). This utility function is based on expectancy, similar to many value models. However, customer lifetime value measures the value customer's bring to the firm, not value the customer receives from the firm's products. This firm centric orientation renders customer lifetime value of little value to the shopper perspective.

Consumer values represent another stream in the literature, largely divided into two approaches. The first, and perhaps most recognized approach, is comprised of two distinct value types; instrumental and terminal (Rokeach, 1973). Each value orientation is comprised of a list of eighteen values which describe desired end states. These values are considered central to the individual and remain stable over time (Rokeach, 1973). The shopper, being unique from the consumer, establishes value not through static evaluations but through an iterative process. During that process the shopper's values play a contributing role in her ultimate assessment of value. However, the shopper's environment in which she makes her value assessments is highly volatile. This makes the use of a fixed set of values as the determinant of value less applicable.

More suited to the dynamic process of the shopper is another values paradigm; list of values (LOV) (Kahle, 1983). The LOV examines consumer values as they are applicable to a variety of roles which an individual may inhabit throughout their life. The LOV uses nine measures representing internal, external, and personal values, and values related to interpersonal relations (Bearden & Netemeyer, 1999). The orientation within

the LOV to represent values as relevant to role is particularly appropriate to shopper value. This approach allows the shopper to alter their valuing criteria to fit a specific occasion or role in which they find themselves. In LOV, role is described as a life stage (e.g., spouse, parent, employee, employer, child, host, guest or self) (Kahle, 1983). The provision that role can be pivotal in framing values, which help in the determination of a desired outcome is one of the central elements in the development of value for the shopper.

These theoretical values constructs represent tools which are employed by shopper in a process of purchase solution value optimization. Shopper value leverages individual's values, framed by the purchase need, to shape what she will value as an outcome. These values constructs however, do not by themselves represent shopper value. The opportunity for values to vary situationally as demonstrated in LOV, opens another avenue within the literature, exploring value from a dynamic assessment which is valuing.

Valuing

Value has been described in the literature as a measure used to assess benefit. Where values are construed to be largely static, valuing is active. Valuing is a process used to evaluate possible solutions and their perceived benefits in relation to others (Flint, 2006). The shopper's value perception is subject to both internal and external influences which continually alter the value perception for the shopper (Flint, 2006). Valuing begins as a generic appraisal which is similar to a consumer reflection on a purchase. However, through valuing, outcome perceptions can alter as details about the purchase need become clearer. Further, perceptions can alter again as the purchase process begins, and

continue to alter for the shopper through the point of purchase. Past this point the consumer may begin to value differently still due to the post-consumption experience (Flint, 2006). The iterative nature of valuing indicates that certain salient attributes such as; retailer, channel, location, brand and product may all gain and/or lose value relative to one another for the shopper, as she moves from purchase need recognition to purchase, or as circumstances surrounding her shopping experience change. The ongoing value assessment implied in valuing indicates there are multiple opportunities for retailers and brand marketers to interact with shoppers throughout the path to purchase from purchase need recognition to purchase. This provides brands and retailers a variety of inflection points along the path with which to co-create value with shoppers beyond the confines of the retail environment.

The valuing model predicates that each individual and situation is unique and dynamic. Attributes are evaluated, added, altered, or deleted in an attempt by the shopper to optimize value. The shopper leverages values related to their perceived role for the occasion as part of the assessment of value. Shopper value can therefore be described as the ultimate assessment of value received by the shopper from her total shopping experience. This form of value assessment finds support within the literature describing customer value (Woodruff & Gardial, 1996). Similar to the customer value framework, shopper value promotes an individual perception based on a unique evaluation of attributes and consequences oriented toward achieving specific goals for a particular occasion (R. B. Woodruff, 1997). Shopper value can be seen to flow seamlessly from the customer value and valuing perspectives (Flint, 2006). The shopper value framework

places the shopper in the center of a specific shopping need occasion. The shopper attempts to maximize value for the occasion, in the face of an ever changing environment. In order to maximize value, the shopper must continually examine attribute benefits against the change they have recognized, to assess whether the benefit has increased or decreased in value for the given purchase solution.

While the literature provides insight on the shopper and value, it is unclear how the shopper engages the shopping process in order to obtain this value. Also not clear, is how differences which have been identified between shoppers and consumers manifest themselves in the assessment of value. Little insight is offered into when or why, an individual may assign more or reduce value for attribute(s) and/or consequences in pursuit of value. Additionally, the literature is silent on the role constraints, either real or perceived by the shopper, may play in the valuing process. Therefore this research is designed to investigate these unresolved questions.

Methodology

Overview of Laddering Theory and Value Hierarchies

The nature of this investigation including the research problems lend themselves to investigation through a qualitative research method. Shopper value, which is the benefit assessment by the shopper from the shopping experience, indicates that value laddering is an appropriate methodology. Value laddering enhances the understanding of the process individuals engage in from attribute evaluation to consequences which lead to value. Qualitative research methods are uniquely configured to aid the researcher in uncovering the meaning and purpose an individual may ascribe to their experiences

(Guba & Lincoln, 1994). Therefore shopper value, which lacks sufficient examination in the literature, is a topic of research for which the use of qualitative methods is appropriate.

Laddering theory, grounded in psychology, seeks to identify connections between attributes and consequences establishing links to value (Reynolds & Gutman, 1988). The structure of the theory is that the "means" (attributes), lead to specific consequences, that in-turn lead to "ends", which are those things of value to the individual. Laddering, through one-on-one in-depth interviews, elicits associations from participants toward attributes and consequences that are driven by their assessments of importance (Gutman, 1982). The investigator being highly directive during the interview keeps the participant focused on the topic of interest. The participant is repeatedly probed by the investigator on the topic of interest to uncover the level of importance a particular attribute has for the individual (Reynolds & Gutman, 1988). The optimum performance objective of the interview is to move the participant up a "ladder" beginning with concrete attributes at the bottom "rung", to more abstract consequences in the middle "rung", which are then tied to what the individual values found on the upper "rungs" or top of the ladder (Durgee, 1986). During the interview process the investigator will not direct the individual solely in a unidirectional manner, but will instead, through a variety of probing questions, move the participant both up and down the ladder. This results in the participant moving from attribute to value as well as from value to attribute (Hinkle, 1965). Interviews conclude when the investigator believes that no further insight will be gained from continued probing of the participant (Brownlow & Watson, 1987).

The laddering technique results in a hierarchical framework which represents the attributes, consequences and values employed by the individual for the given topic. The hierarchy is comprised of three categories: at the base are attributes; the intermediate level contains consequences; and the top level contains end states or values (Reynolds & Gutman, 1988). The categorical hierarchy helps to move the participant forward and indicates association significance between attributes, consequences and values (Brownlow & Watson, 1987). The data once gathered are then parsed by the investigator into the appropriate ladder categories from the base to the top. Once categorized, linkages between and among the categories are examined (Reynolds & Gutman, 1988). The resulting hierarchies express the participants associations between attributes and end states which represent what the participant values.

Study Context

Shopping, inclusive of all the products and channels available in today's marketplace, has become an activity in which men and women engage almost equally (Otnes & McGrath, 2001). Additionally, with the ability to reach target audiences unhindered, means that shopping can now be practiced by virtually all ages as well (Reece, 1986). For the purposes of this study, shopping is confined to the purchase of salty snacks. Salty snacks were selected due to their high repeat purchase rate and level of loyalty they can engender (Brockett, Golden, & Panjer, 1996; Kraak & Pelletier, 1998). Salty snacks are generally described as consumer packaged goods (CPG) consisting largely of: potato chips, pretzels, tortilla chips, popcorn, crackers, seeds and nuts along with several smaller miscellaneous segments (United States Department of Labor, 2012).

Sampling and Description of Participants

The sample was drawn purposefully. This technique, standard in qualitative research, identifies participants who have experience with the topic of the investigation (Patton, 1990). Participants for this research indicated their familiarity with shopping for grocery and CPG products regularly, and had been grocery shopping within one week of the interviews. Participants were recruited by the primary, as well as other researchers. All researchers were trained in qualitative interviewing techniques. The interviews were all conducted face-to-face, over a period of several weeks during the fall of 2010. All participants were recruited by the researchers based on their prior knowledge of the participant and their shopping habits. Care was taken to keep participant interviews in close proximity to the last grocery oriented shopping trip.

Purposeful sampling plays a major role in qualitative research; in this case it became clear, through the coding and analysis process that participant familiarity with the topic led rapidly to saturation. Sampling ceased at 13 participants, as it became clear that saturation had been achieved. Table 13 represents the participant demographic profile. The data collection method used in this research is described in the following section.

Data Collection

The method for data collection when using laddering theory is the in-depth interview (Reynolds & Gutman, 1988). The interview goal is to generate details which are particular to the participant and are recorded in a way which can then be abstracted to a more generally applicable level (Gorden, 1956). The result of these abstractions are value hierarchies which demonstrate the connections the participants have created

between specific attributes, and consequences leading to desired end-states (Durgee, 1986).

Table 13 *Participant Profile*

Pseudonym	Gender	Age	Occupation	Ethnicity
Steven	Male	26	Sales	Hispanic
Teri	Female	27	Sales	White(Not Hispanic)
Amber	Female	24	Nurse	White(Not Hispanic)
Sue	Female	18	Student	Asian
Joan	Female	22	Student	Asian
Erin	Female	27	Retail	White(Not Hispanic)
Sandra	Female	53	Sales	White(Not Hispanic)
Linda	Female	50	Nurse	White(Not Hispanic)
Gail	Female	51	Physician	White(Not Hispanic)
Kathleen	Female	20	Student	African American
Barbara	Female	34	Homemaker	Asian
Kristen	Female	21	Student	African American
Tom	Male	24	Retail	White(Not Hispanic)

Face-to-face interviews were conducted with volunteer participants, which were recorded and then transcribed to maintain the integrity of the in-vivo terminology. In-vivo terminology allows for the inclusion of the participants own words and meanings which can be inferred through the transcript (Van Maanen, 1979). The setting for the interviews was at a convenient location selected by the participant. The participant selection of location is designed to instill an environment of confidence and safety for the participant to enhance their comfort with sharing information (Reynolds & Gutman, 1988).

Data Analysis

The data are analyzed using content analysis. The results are hierarchical value maps (ladders). Interviews are analyzed individually, identifying links both across and between categories (Leppard, et al., 2004). Analysis begins with the development of a set of master codes representing a group of similar responses. This is achieved through the interpretation of the meaning of a word or phrase provided by the participant. These meanings are then examined across interviews identifying similarities among the participants. Each level of the hierarchy has its own master code set. Categories are created which are individually substantive and have meaning in their application to the value hierarchy as a whole. Code categories must be comprehensive in their representation but not so broad that connections to the next hierarchy level are weak (Reynolds & Gutman, 1988). The resulting maps reflect a comprehensive set of links and the strength of those connections for each participant (Leppard, et al., 2004).

Coding

The initial coding work was performed using software designed for qualitative data analysis (QDA-Miner). During this phase the transcripts ranged in size from 3,800 to well in excess of 10,000 words each. Transcripts were coded and categorized according to hierarchical level (attribute, consequence, value). Coding represented units of meaning as viewed from the phenomenological tradition which helps to maintain the integrity of participant meaning (Creswell, 2007; Moustakas, 1994).The interpretation of the more than 200 pages of transcripts took place during a six month period in the fall of 2011 and resulted in a total of 134 codes. The total hours required for analysis exceeded 180 hours.

Codes which were deemed to be redundant, either through literal understanding or through a relational understanding of the text were removed (Creswell, 2007; Moustakas, 1994). The resulting categories and codes were examined through further analysis for similarity in meaning resulting in clusters of meaning which in combination still represented the totality of the participant meaning (Creswell, 2007; Moustakas, 1994). The analysis continues finding more and more commonality until the clusters begin to represent themes (Creswell, 2007; Moustakas, 1994). The themes which emerged collapsed the coding clusters into six emergent primary end state values themes: *family, health, security, community, nurture, and independence*. In conjunction, thirteen secondary value sub-themes emerged to support or interconnect with the end state themes: *scarce resources, reciprocity, frugality, job, role, bonding, home, memories, knowledge, inclusion, treatment, others, and trust*. The themes are then re-examined in light of the complete context of the participant data to ensure that they are reflective of the data and not the researchers own pre-supposition (Creswell, 2007; Moustakas, 1994). These themes in combination served as the platform for interpreting the data and how the connections between attribute to end state are made. (See Appendix B for ladder recaps)

Evaluative Criteria

Trustworthiness of the data and the analysis was assessed using four generally accepted criteria for qualitative research: *credibility, transferability, dependability,* and *confirmability* (Alkin, et al., 1979; Lincoln & Guba, 1985; Miles & Huberman, 1984; Patton, 1990). From grounded theory, four additional measures can be used which enhance the evaluation of the data which are *fit, understanding, generality,* and *control*

(Corbin & Strauss, 1990; Flint, et al., 2002). An overview of the processes undertaken to address the trustworthiness of the data and the following analysis can be found in Table 14.

Findings

The purpose of this study is to develop a deeper understanding of what a shopper values in the context of salty snack purchases. While the context is bounded by a single CPG category, the responses would indicate that these results would be relevant to a broader range of product categories in the grocery context and beyond. The primary findings with regard to what shoppers' value found in this study relate to six main value themes which are represented by: *family, health, security, community, love, and independence*. These six themes are supported by thirteen sub- themes which together comprise the end states uncovered in this research. The sub-themes are represented as: *scarce resources, reciprocity, frugality, nurture, job, mother, connection, home, meals together, memories, sentiment, knowledge, inclusion, how I am treated, what do others think of me, and trust*. Additionally, the research identified two constraints which were universally regarded by participants, those being temporal and financial.

These themes, while unique, do not necessarily exist distinct from one another. The complex nature of assembling a value system for the shopper requires many competing and complementing value orientations to be considered. This complex relationship between values, being at once supportive and seemingly at odds, is not unique to shopping. Organizational behavior recognizes this relationship and cites it

Table 14 *Trustworthiness Activity Recap*

Criteria	Method to Address the Trustworthiness
Credibility	Principle researcher : - spent over one year collecting data and finalizing analyses - consulted advisor's and committee members during data collection, interpretation - insights and interpretations of data from the advisor's and committee member were used to further refine the analysis
Transferability	Purposeful sampling used for participant selection resulting in: - Varied experiences across the sample - Varied ethnic backgrounds - Varied age ranges - Varied genders -Varied life-stages -Varied location experiences including international
Dependability	Participants: - Reflected on a variety of shopping experiences - Described not only the most recent but prior memorable experiences
Confirmability	The combined ladders resulting from the analysis of the principle researcher were compared with individual analyses by the assisting researchers. The resulting comparison demonstrated high correlations.
Integrity	- Interviews were conducted by trained qualitative interviewers - Interviews were held in participant selected location - Interviews were handled in a non-threatening manner - Participants; interview voluntary and right to exit the research - Participants were extensively briefed on the process to maintain their anonymity of their data received detailed outline of anonymity processes and privacy of - Participants were extensively briefed on the security processes regarding their data
Fit	Credibility, dependability and confirmability address the fit of the data
Understanding	Participants were selected post-analysis to review the findings related to their data and assess the accuracy based on their initial interview. All cases were confirmed as accurate.
Generality	Interviews were all of a sufficient length resulting in open conversations revealing many insights regarding the phenomenon of study.
Control	Participants though led during the interview, where free to discuss all facets of their experiences.

as contributing to increased performance (Bledow, Frese, Anderson, Erez, & Farr, 2009; Miron, Erez, & Naveh, 2004; Rice, 2006). Under certain circumstances one theme can relate to another and at times multiple other themes. In total, the six value and thirteen sub-themes provide a comprehensive web that guides the shopper through the purchase with a goal of value optimization. As is the case with the dynamic nature of shopping, the complimentary or competitive orientation of themes in relation to another is not fixed across the sample. The unique experience of each of the participants has influence over this relationship.

In addition to competitive and complementary orientations, valence within the themes is also present. Attributes and consequences which direct the shopper toward their desired end state are not uniformly positive in their association and can also be negatively valenced. Negative valence in the hierarchy does not necessarily result in a negative impact on value. Intermediary sub-themes can be employed to support themes of value to the shopper, thus assisting with value optimization. (Ahluwalia, Burnkrant, & Unnava, 2000). If there is no ability to engage intermediary sub-themes, the negative valence will result in a value reduction, thus sub-optimizing value for the shopper (Ahluwalia, et al., 2000). The valence during this research was determined via the description of the attribute, consequence, or end state as given by the participant. Similar to the prior discussion on complements and competition, valence is also not fixed across the sample and varied by participant experience and preference. The lack of stability of valance for a particular attribute both within an individual as well as within society is also supported in the literature (Nowak, Vallacher, Tesser, & Borkowski, 2000).

The findings for each of the six main value themes will be discussed in some detail. Relevant passages of in-vivo text will be provided as data to support each theme. Table 15 represents relationships among the themes and sub-themes. Two constraints; temporal, and financial were found to be applicable across the sample and are discussed first. The constraints discussion is followed by the themes, which are presented in order from the least to most frequently occurring follows: community, independence, nurture, health, security, and family.

Temporal Constraints

In the context of this research shoppers universally feel constrained by time. This stands in sharp contrast to the consumer who may not acknowledge any constraint on their time. As discussed earlier, the consumer is much more general in their approach to a brand, product, retailer, or store location.

This abstract nature of the consumer can be seen in the passage below:

> Just to browse…I guess I just realized this, I do look and see what kind of books would interest me, something that I might not have known about…I guess it's like research before I buy it online I don't know…That's why I said there's two different things I go to browse and go to just look at stuff or I'm actually going somewhere to get something. [Steven]

In this passage the participant acknowledges a fundamental difference between consumer behavior (e.g., browsing) and the goal oriented behavior related to shopping. Our participant describes himself as engaging in research, browsing, and looking; all activities which occur prior to actively engaging in a purchase. Additionally, there is no reference to a limit when this pre-purchase activity should cease and purchasing should commence.

Further, Steven defines shopping differently describing that activity as “going somewhere to get something”.

Table 15 *Theme and Sub-Theme Relationship Matrix*

Themes	Family	Health	Security	Community	Nurture	Independence
Family	**X**	**X**	**X**	**X**	**X**	
Health		**X**	**X**			
Security		**X**	**X**			**X**
Community	**X**			**X**		
Nurture	**X**		**X**	**X**	**X**	
Independence						**X**
Sub-Themes						
Reciprocity			**X**	**X**		
Scarce Resources	**X**		**X**	**X**		**X**
Job		**X**	**X**	**X**	**X**	
Role	**X**	**X**	**X**		**X**	
Frugality			**X**			
Home	**X**	**X**	**X**		**X**	
Bonding	**X**	**X**	**X**			
Memories	**X**		**X**	**X**	**X**	
Knowledge						**X**
Inclusion				**X**	**X**	
Treatment				**X**	**X**	
Others				**X**		
Trust	**X**		**X**	**X**	**X**	

Shoppers, as our participant expressed, are on a specific mission to “get something”. Therefore, time, and finances as well as the brand, product, retailer, channel and store location all carry a particular relevance for the shopper. In each of the interviews, participants made reference to a feeling of stress or pressure which related to either a real or perceived constraint on their time. In seven of the participant interviews the exact same terminology was used to express this constraint which was the following

phrase: "*get in and get out*". Three more participants during their interviews used a phrase with only minor variations from previous phrase:

> …get in there and get out. [Amber]
>
> Get in and get what I need and then leave. [Tom]
>
> …try to not waste as much time as possible. [Susan]

Another participant describes her feelings of time constraint from a resource perspective:

> I know where I can directly go to, to get the thing I want, so it's really time efficient because for me time really is like a resource, really scarce [Barbara]

In one final case the participant uses the actual term "time constraint" during her interview:

> Well then you'd miss it, if you didn't know to look there then I'm not gonna take the time to go up and down every aisle, I don't ever do that…Well time and I'm in there for this amount of things, probably ***time constraints***. (Emphasis added) [Sandra]

These excerpts highlight the clarity with which the participants see a difference in their attitude and behavior between being engaged as consumer or a shopper. From the data it can be seen that the participants clearly value time differently as a consumer. Consumers are not engaged in a pursuit with a fixed end point and therefore can afford to spend unfettered time browsing, researching or looking. Browsing as described in this data, can be seen reflected in the consumer behavior literature as an example of external search (Beatty & Smith, 1987). There is no mention in the data relative to the shopping experience of engaging in any form of external search behavior (e.g., browsing, research

or looking). The participant's description of themselves as a shopper reveals a goal orientation focused on securing a purchase. Time in this data is universally construed by the shopper as being at a premium during the pursuit of the target product solution.

Financial Constraints

Financial constraints have long been discussed in the consumer literature. The literature by and large reflects financial considerations as an orientation to be thrifty or an attribute used in external search (Ailawadi, Neslin, & Gedenk, 2001; Schmidt & Spreng, 1996). This study would confirm this line of literature. Throughout the interviews words which serve as indicators of a financial consideration such as; save, cheap, budget, coupon, etc. appear over 250 times in the data. Upon careful consideration of the data, financial constraints can be categorized into two types; self-, and situationally-imposed. Self-imposed would reflect and confirm the literature with regard to an orientation to be thrifty (Ailawadi, et al., 2001). An example of this first type, self-imposed financial constraint, can be seen in the sample text below:

> The prices, it's overpriced…I didn't buy anything…if I know I can get it cheaper somewhere else, why would I buy it at the store…Sure yes, I guess it's because I like to have more money in my bank account,…the more money the better. [Steven]
>
> Because I'm frugal…I don't like to spend a lot of money…I like to hoard my money…to have it. [Teri]
>
> I'll tell my husband I've saved…but you feel like you're getting a little bit better deal if it's on sale…and you save more money then you always feel good. [Linda]
>
> …a little bit cheaper prices if you get the off brand, that's normally what because it doesn't really taste different to me so I just usually try to shop cheap. [Sandra]

The data reflect participants' orientation toward thriftiness. Not only is this enforced during shopping it presages future purchases as it can be seen as a salient attribute toward external search. Research has indicated that this can be both a conscious goal or a non-conscious activation (Chartrand, Huber, Shiv, & Tanner, 2008). Goals, like thrift, can be ingrained through prior experience or prior training or education (Aarts & Dijksterhuis, 2000). However, whether activated through engrained orientation or through some form of external stimuli the goal once activated can be expressed, which we see in these passages (Chartrand, et al., 2008). Therefore, the shopper may bring this orientation with them to the shopping experience or thrift could be activated through the shopping experience further demonstrating dynamism in the shopper.

Different from this static orientation of the shopper is the situationally-imposed financial constraint. This constraint is only enforced by the shopper due to circumstance (Chah, Ramey, & Starr, 1995). In these excerpts below taken from the interview text, the participants are describing a situationally-imposed financial constraint:

> Sure I did but I didn't want to buy it that day because I wanted to wait until I had more money. [Amber]
>
> …we don't have that much money… [Susan]
>
> I guess price because we have a budget… [Sandra]

In part the literature would argue that in fact all financial constraints are situationally bound (Chah, et al., 1995). In fact, situation can be determined not only by current economic conditions, but estimations of future conditions as well as conditioning or

training over time (Chah, et al., 1995). The following data from Steven, who previously expressed his enduring orientation to thrift, can be seen shifting somewhat in this excerpt:

> I like the taste and I've never seen a Brazilian beer in the US before that's the only place I've actually seen a store that actually sells Brazilian beer and Orangina, I haven't had it since I travelled to France, but I liked it a lot and I remember T once bought me for Christmas a whole case of Orangina and that's the only time I'd had it since I last visited France and then I found out that Fresh Market had it I was very excited. [Steven]

Here Steven, shopping in an upscale grocer, Fresh Market makes no mention of price or saving, just that he is excited to be able to purchase these items which he values. In this case we can see clearly that even professed orientations of financial constraint may in fact all be situational (Chah, et al., 1995). Therefore, we can see that this relationship to price is curvilinear in relation to value. A relationship which has been discussed in relation to both brands and products but not specifically toward value (Dodds, Monroe, & Grewal, 1991)

At no point in any of the interview text does a participant express a sense of freedom to spend money without consideration. This is important as the sample contains participants who span the income groupings from unemployed students to medical professionals. In fact the general sentiment of the shopper can be perhaps best expressed in this excerpt:

> …organics are just too expensive. I can't justify that…I think that regardless of income you don't want to waste, I come from a very frugal family so I'm not gonna buy raspberries in the middle of winter because that's very pricy whereas in the summer when they are available it would be different… I think you can substitute certain products in that I think are good substitutes, sometimes you

> have to use the name brand but I think sometimes you can substitute the products in or find something that's replaceable. [Gail]

This indicates that the shoppers are always aware that another purchase need is on the horizon. Money saved from the present purchase can help forestall any potential negative impact of the future purchase. This may reflect regret or guilt for purchases which for the shopper were sub-optimized in value (Burnett & Lunsford, 1994).

Consumers' abstract ruminations about products run counter to the shopper, who understands that their actions will result in an actual outlay of money. Shoppers are keenly aware that they will have to have the necessary funds to make this purchase, as well as yet to be determined future purchases. Therefore, for shoppers, the consequences of making a poor purchase decision, which results in money being wasted will have to be accounted for during future purchase occasions (Burnett & Lunsford, 1994). An example of this can be found in this excerpt from the data:

> …Janice brought this up not me, we came to the conclusion we were buying things based on price and then we wouldn't eat it because we didn't like it or we didn't necessarily enjoy it. So we decided, I mean we still, we still use price as one of our main factors in deciding something but if there is something else that we like and it's not necessarily the cheapest we'll get it…we're not gonna base everything on price because we get things that we don't eat so it's just a waste. We've got boxes of crackers in the pantry and we've not opened up, we bought them just because they were the cheapest and we bought in bulk and then we decided we didn't like them.

Consumers, have no identified need to purchase, so they are free to reflect or dream about products, without any fear of negative financial consequences. Consumers' speculation about products is therefore absent either financial or temporal constraint. It is

not until purchase need occasion becomes identified, and shopper purchase mode has been activated, that temporal and financial boundaries become salient. As a result therefore, it is implicit in each of the following theme discussions that the shopper for reasons either perceived or real is acting in a manner which reflect both a time and financial constraint.

The balance of the chapter will be devoted to a discussion of the emergent themes, limitations and contribution of the study. The themes are presented from least occurring in the data, to most frequently occurring. The first of which is community.

Community

Community is represented only twice as a primary value theme through the hierarchies. However, through the many connections with the thirteen sub-value themes, community equals security as the most interconnected of the primary themes. The word community itself speaks to the themes interconnected nature, as by definition, community can refer to a place or territory, relational reliance among individuals, which can be either tethered to a place or simply tied to a shared vision (Gusfield, 1975; Merriam-Webster, 2011). Community as a theme represents a complex web of relationships which is expressed in two orientations: personal or micro-level community; which is the engagement between individuals and close personal groups or family, and civic or macro-level community; which is engagement with commercial and social sustainability oriented toward commercial and social reciprocity.

The first community orientation, personal, is represented in the data through shopper's direct interactions with others. The others may, but are not necessarily,

shopping with the participant. Examples of interactions between the participant and others she is shopping with can be seen here:

> Well the last time I went to Food City I was in a rush and I was with my friends we just went to get stuff to make cupcakes and so we just ran in, we knew we wanted Funfetti cupcakes and so we just got the icing, the mix and oil and we were out of there it was a really fast trip that was the last time I've been to the grocery store. Well I had gone to Bath and Body Works that day and I smelled a cupcake candle and it smelled so real I was like guys I want cupcakes, so and I didn't want to go to a cup cake place because they are always too rich tasting so I was like let's just make homemade cupcakes so on our way home from Bath and Body Works we went to Food City because the candle really smelled like a real cup cake and it made me hungry. My friends thought I was crazy but they enjoyed the cupcakes. [Erin]

The connection between shopper and the others with her leads to furthering not only her own sense of community, but through cooking and eating together, establishes a sense of community with other even beyond those engaged in the shopping experience which are all described in this excerpt. This concept of engaging with others is a common platform used by booksellers, coffee shops and boutiques all designed as places for shopper to engage not only with those they bring with them but with others who frequent the same retailer (Miller, 1999).

Community is also about shopper interactions with others she engages while shopping but who are not shopping with her. Examples of these interactions from the data include:

> Oh I talk to everybody when I shop it's kind of funny, not as much as when I lived in Louisiana because everybody talks to everybody else there, but yeah you do talk to other people. It's funny I had a thing of

> flowers in my cart and more people came by I mean the flowers were there for everybody there were lots of them, everyone walking by were just like, how pretty, how pretty but people are fairly friendly. [Gail]

> At Fresh Market it's weird whenever I shop there and the other customers they always ask about our opinion. You know like when they are good and she says yeah try that one and things like that, the other day when I bought a cooked chicken at Fresh Market and one old lady came up to me and asked have you ever tried the chicken that one, she was supposed to buy other stuff but she came up to me and asked about that chicken specifically and I talked to her. My friends loved it and they recommend me to buy this one and she talked to me and they choose to buy, like they changed their mind and. So in Fresh Market it's not, customers are not just customers we are just asking opinions of each other and in the cake section the other people came up to me asked have you ever tried that cake and I'm like yeah that one is really good and so at Fresh Market they are more like trying to interact with the people. I don't know it's how I can build up the trust I can see they are shopping at Fresh Market frequently and they know about Fresh Market so they recommend something that I might consider to buy. [Joan]

These social interactions positively reinforce a sense of community through the retail environment. These interactions can lead to positive community building events that go beyond the shopping experience. Together, these shopper interactions are similar to self-identification with a brand (Escalas & Bettman, 2005). These interactions help shoppers feel like they are part of the in-group and sharing in a retail environment with people similar to themselves. These examples also demonstrate how interactions between shoppers support the retailer, store location, and also products, and brands within the store. This type of community fosters a sense of belonging between the shopper and the store. This can lead to shopper confidence that the optimized purchase solution is available at that store, both of which can drive loyalty (Lee & Robbins, 1998; Sparks & Shepherd, 1992). Further it has been demonstrated that absent this sense of community

shoppers move to out-shopping a process of moving regular purchases from the home market to some other out market (Samli, Riecken, & Yavas, 1983). This clearly reflects something of value for the shopper if she will demonstrate her desire for community to move the physical location of her shopping to another market to get it. This also serves as an indicator of the civic or macro-level of community, which is explored next.

The second, civic in orientation, is represented in the data in two ways; employee/ shopper interaction and reciprocity. First, we will discuss shopper and employee interactions. The shopper has expectations for interactions with employees. The interaction can either reinforce, or reduce the sense of community (Gefen & Straub, 2004). An example of reducing community through a negative customer service interaction can be seen in this example:

> Well the lack of, I wasn't greeted when I walked into the store…she didn't ask me if I was finding everything okay, you know nothing like that…Well it annoyed me…and at the cash register the lady didn't say hi or anything she just took my stuff and started ringing it up which I thought was pretty rude and I thought about contacting the company actually…I've worked in retail and I know that is supposed to be part of it, and I know they are supposed to be engaging me to try to get me to buy more things…I mean if someone is walking into your store you shouldn't just act like they're not there I mean you know, you should at least say hi or make eye contact, they didn't even make eye contact with me…Because I feel like if you're rude that's kind of going against social norms to not be rude, you should be polite…Because it affects the brand, the brand's image. [Teri]

Clearly, the shopper entered the retail setting with certain social or communal expectations. Her expectations were founded in the community expectation of how interpersonal interactions between employees and shoppers should occur (Gefen & Straub, 2004). This shopper felt the lack of anticipated interaction was "rude", and

against “social norms” which seems to have tarnished the brand for this shopper. The shopper not only had personal expectations, but retail training helped frame her expectations of the employee/shopper interaction.

We can also examine communal interaction from the positive perspective. In this scenario positive interactions reinforce a sense of community:

> When I went in there…all the workers were kind of paying attention to me I guess…If the workers are trying to help me out and all this stuff that does help a lot…Even though I had specific wants that I wanted but I wasn’t really sure on the color or design or anything like that…Well I usually don’t get help but that time I wasn’t really sure and I wanted to know what other people would think about the style and all this stuff so I did ask when I was trying to pick the color. [Susan]

> I want to say that was a month ago…I still remember the people who were helping me were very helpful… I was really satisfied…I was so satisfied and so happy with how she helped me…because if I didn’t have anyone to help me I probably would be like 9 times out of 10 I probably would have left because I wouldn’t have been able to find what I was looking for so the fact that I had someone there to assist me made it a lot easier for me to find something and purchase something. I found out that she was actually a student at UT she had just transferred because we started a conversation because she was so helpful and she asked me did I attend UT and like she was actually trying to find out what exactly I was purchasing…so she asked me, did I go to UT, and I told her and she was like oh okay I just transferred to UT and I actually found out this was a student that also went to UT she was around the same age as me so I think that had a lot to do with it...The assistance of the clerk, how she was so willing to help, she helped me find things and I really appreciated that. [Kathleen]

> Because they have a separate area for the seafood and poultry those kinds of stuff, so usually I go directly to that counter, ask them. I choose for example a fish ask them to clean it and while they are doing it I can do other shopping, so kind of manage my time a little bit more efficiently. [Barbara]

> I get up there maybe 2 maybe 3 times in the fall, the first time I went there last year they got to know me pretty quick because I spend enough money and by the time I came back for the next game they knew me, you know I don't go again until I go to pick him up so I won't be back until the spring but it was kind of funny how they recognized me…Well I think it's kind of a rush, makes you feel good you know, like you're important, like you're special even though you're probably not…they were exceptionally good to me, so I mean it's great customer service and you know makes you feel good. [Linda]

From these entries it is clear that anticipated social interactions were met or exceeded. In each case, the shopper obtains additional benefits because her expectations were met or exceeded. Indecision was removed in the first passage, while a pseudo-friendship or social connection is made through the second service interaction. The third passage results in time efficiency both in-store and in-home. This is important as the shopper is always temporally constrained. The final passage shows the personal sense of well being resulting from the positive interaction. All of these interactions symbolize a community which is functioning as the shopper has pre-determined it should. These met expectations serve for the shopper as an indication that her community is operating well and is healthy (Cova, 1997). As was noted above this can reinforce the shopper and reduce the tendency for out-shopping (Samli, et al., 1983)

In these interactions, the social contract between the employee and the shopper has either been executed properly or improperly, developing or diminishing community between the retailer and the shopper (Dunfee, Smith, & Jr., 1999). In turn, the interaction can reflect positively or negatively on the store location, as well as the brands and products within the store.

Another aspect of the macro civic orientation, reciprocity, relates a broader sense good community based on shared commercial interest. Therefore this community orientation is represented as an economic transaction between shoppers and providers, impacting the community performance at large. Current themes in the literature related to food, which would support this stream are; buy local, and farmers market phenomenon (Bougherara, Grolleau, & Mzoughi, 2009; Feagan & Morris, 2009; Little, Maye, & Ilbery, 2010; Zepeda, 2009). Examples of community reciprocity found in the data are as follows:

> I don't know it's not a feel good thing it's kind of like you know you've gotta support these guys because even though they are probably supplying some of the more local producers they still need to have, they still need to be supported so they can keep on producing and they can take care of their families and you know they have an economy, it's part of the economy and a lot of people feel like well let's put it this way, it's kind of way off our subject but Wal-Mart, I don't go to Wal-Mart, never have, never will because I think that Wal-Mart is destructive to the economy of a small town so I don't support it at all, so same idea there. Because they come in, they undercut all the prices, they hurt everyone else that is in business in that area and then if they decide to close the store they leave and then that little town is left with nothing because they've already annihilated the pharmacies and grocery stores, the mom and pop grocery store, and the clothing store and everybody else, so even though we have a big chain like Kroger they'll take Grainger county tomatoes and they'll take a little bit of this product and that product that's made in this area and they will allow it to be there so you can take that and that person then has a little bit of help in terms of trying to keep their little business going versus being wiped out by a big conglomerate like Kroger.

> Well I think that's, you know, part of it's not giving back to the community but it's just like I want them to purchase my product therefore I should purchase their product so you know if you produce one product and completely ship it out all the time then your community has no loyalty to you, so if your business goes under they don't care. If you're a producer and your community buys your product and you're having trouble and you make it known that you're having trouble you may find that the community comes to your rescue and therefore you have more of that support that you need. So by supporting the local farmer keeps him in business

> keeps him going so that he's not doing something totally different. Because I think that builds a sense of community and responsibility, I don't think you should buy a product just to buy a product but you know particularly if they have a good product like Sweetwater cheese I think you have to support that so that they stay in business and they do produce a unique and interesting product. [Gail]

This passage articulates the economic model through which the shopper views her shopping experience. Brands and products are not anonymous to the shopper. Locally produced items can be identified and supported either direct from supplier or through traditional retail channels. The deliberate sense of shopping for the good of the community reflects her sense of reciprocity between herself and the provider. The shopper anticipates that her product purchase patronage will in turn be met with reciprocal patronage for her services, which together support the community at large. This form of reciprocal behavior has been demonstrated in the virtual community (Casaló, Flavián, & Guinalíu, 2008) and the example provided here would indicate its relevance in the physical community as well.

Distinct and virtually opposite from the theme of community is the theme of independence. This particular theme addresses how shopping is approached as an individual activity.

Independence

Independence, while present in the data, was not seen with tremendous frequency, appearing only three times as an end state value. The actual words independent or independence do not appear at all in the data. This finding is interesting as Americans are renowned for their individualism and independence (Hofstede, 1984). In the particular

context of this research however, independence is not a frequently sought end state. However, independence in the act of shopping appears in many cases throughout the data. Independence is asserted by the shopper in pursuit of a still higher goal. The excerpts from the data seen below, demonstrate that shoppers regularly engage in independence whether shopping for themselves or for others:

> I don't say, "Hey do you think I should get this"? [Teri]

> I'm thinking in my mind about my life. [Amber]

> I like having that freedom, it's my money and I will buy what I like. [Erin]

During the course of the interviews it became clear that one of the participants felt very strongly about her independence, as you can see below:

> Oh of course you look for a favorable outcome, you want someone to like it, but, if they don't, they can leave it. For me it's more so if I like it then that's okay I mean there are some things I like that a lot of people don't like. [Gail]

> I definitely have a thought in my mind about what I want to do. [Gail]

> I knew what I wanted to do. [Gail]

> …never bought anything else because I like that, don't really care if anybody else doesn't, so that's what I like so that's what I buy. [Gail]

Independence can also be seen in the data tied to elements of security. The connection to security is largely toward ensuring that the shopper maintains the ability to engage in some preferred activity. An example from the data can be seen here:

> I just like to travel all over see new things and so I think that's where I'd rather spend my money is in travelling than shopping… [Erin]

Further, there are frequent mentions in the data that retailers and brands take actions through alterations to their stores and products which negatively impact shopper independence. The actions taken by retailer and brand can be seen as a method to restrict shopper choice, which engenders for her a stronger sense of independence (Venkatesan, 1966). Gail who was the most independent of the participants offers two seminal comments on the subject:

> …a lot of times they like to change the stores. I think it's not to their benefit. They think they'll make people look at other products as they move around, I don't think that's true. People know where they want to go, they want to go quickly to what they want and it aggravates them when they change things. Every time they change the store I think everyone gets more upset than happy. I think that's an interesting marketing tool that doesn't make a consumer happy. [Gail]

> Well because they change products and with her allergies they change a product we usually find out second hand when she gets sick or she has a reaction to it and we've learned to re-check all the labels. [Gail]

In all, shoppers in this context can be seen to reflect the independence that the American consumer is so often cited to have. This independence represents the rugged individual ideal in America. This is less about the shopper expressing individuality but more about self reliance. Bearing in mind that the shopper perceives herself to be time

compressed, being able to pursue her goals without assistance, becomes a benefit which enhances value. The literature recognizes that product change can result in reduced utility for consumers (Lancaster, 1966). What has not been examined is the shopper's loss of value which can be insinuated into the shopping experience not only through the product but also through the environment. Independence should also not be construed to mean anti-social. Shoppers do engage in socially oriented pursuits. A particularly intimate social pursuit is found in the theme of nurture.

Nurture

Nurture is closely aligned with security, health, and family. A key facet of nurturing is the mission to develop and care for others who are close to them, such as family members or close friends. References to a role or job made by shoppers in the data are not always seen as positive or pleasant but are however universally expressed as a matter of pride. Therefore the caring aspect of nurture further underscores its close association with other themes such as security, health, and family (Seyfang, 2005). Examples from the data are as follows:

> I guess it's part of my job, I mean it's just nurturing a nurturing mother. Well labor of love I'd call it, part of running a household making sure that there's milk in the house, and Tim has his creamer and the dog, food for the dog that's just part of it, part of it. [Sandra]

> It's like to meet our needs, physical needs for each week, It's our food supply right? I mean it's like a task for me really it's like a task. But the difference in the Chinese grocery store I find something I really like and I haven't had it for a long time and I cannot find any other stores. I will enjoy it. [Barbara]

> I think it's being a mother, being a nester, whether you're feeding yourself or feeding your family you think, I do I think what different people like, what's gonna work together, what is interesting, it has to be interesting and a lot of

> people don't do that but to me it's important to make sure everybody like it and will eat it because it's a source of nutrition. [Gail]

> I guess it's probably they're both *(scrapbooking and cooking)* a way of I can show my love to different people, you know putting my love into making a card is the same thing as cooking. [Linda]

These examples demonstrate the care, love and enjoyment participants feel toward their job or role to nurture. These data also demonstrate that her role may extend beyond the family to others, who may be nurtured through the shopper's activity. The context of this research being food/CPG results in a high incidence of food purchasing and cooking behaviors being reported in the data. It has been noted however that the purchase and preparation of food is one key area of nurturing in the family (Davidoff, Lee, Yiu, Zimmerman, & Dey, 2006; Davidoff, Lee, Zimmerman, & Dey, 2010). It has been reported that the automation of certain household functions (e.g., cooking) are detrimental to the family, through the loss of a highly demonstrable indicator of care for others (Davidoff, et al, 2010).

Nurture is about the role the individual feels she plays in her family and the lives of others. She executes this role through a demonstration of care and concern (Thompson, 1996). Additionally, nurture represents a way for her to teach and train those around her to perform these same tasks in preparation for their assumption of a similar role. This is demonstrated perhaps most clearly in the area of health.

Health

Health, similar to nurture, is highly inter-related with security and family. Health, particularly as it relates to food, is an extremely important topic to the shopper and the people they purchase for. The literature describes a variety of current trends related to health and food supply safety; local food movement, organic, sustainable, food content, food supply, and nutrition to name but a few (Brewer & Rojas, 2008; Coley, Howard, & Winter, 2009; Golan & Unnevehr, 2008; Stranieri, Baldi, & Banterle, 2010; Vermeir & Verbeke, 2006).

The data represent this theme as a concern for maintaining or increasing health for others, or toward self (shopper). The finding that health is a key end state theme is not revolutionary, however, the fact that it can present itself in this dual fashion may be. Marketing to shoppers requires that messages be tailored in a manner which help the shopper develop specific purchase solutions. Failure to identify which orientation (e.g., self or others) the targeted shopper is aligned with will result in a failed marketing effort. The marketing of purchase solutions must target different products depending on the shopper's orientation toward self and/or others. The data clearly reflect the differences in these two streams, beginning with the health orientation toward self (shopper): (emphasis added)

> The natural foods section I guess, the produce department. Because I try not to buy that much processed food even though I end up buying it some because I eat out a lot, so I try to buy things that are not horrible I guess. Because I'm trying not to get high cholesterol, I do it for **my** health. [Teri]

> **I** usually try to eat the healthier ones. [Amber]

> Yeah but I go to grocery at Fresh Market I like that store, they are fresh. Because one day I bought apples at Wal-Mart and it never goes bad so I could tell how much they put the chemicals and stuff and I didn't like that. Grocery for me freshness is more important because **I'm** eating that. [Joan]

> I don't have time and I don't have the inclination so having prepared food or anything that's easy to prepare or heat up is really important to **me**, so when it tastes good and it's relatively nutritious like rotisserie chicken then it's the best of both worlds for **me**. [Kristen]

> Because of the chemicals, they are better for cholesterol, you know they are healthier eggs and since **I** like eggs **I'll** do that. [Gail]

Alternatively, the data also reflect an orientation toward the health of others:

> Nutrition is very important I mean I'm not going to, as I said because everything is made from scratch and looking at that it's important on freshness, it's important on the price, it's important on the purity, contaminants. I have to watch for that…for the **whole family** actually I try and push having the 4 food groups…particularly eating those food groups and not having a dinner that's mashed potatoes, rice and corn as **our** vegetable that kind of thing I don't like that. [Gail]

> You know nutrition to me is so important I have to find things that work for **her**. [Gail]

> Well you control the nutrition and the meals that **your family** is taking. I use more fresh and try and limit the salt in-take. [Sandra]

> Well keeping **them** all healthy… you know I don't want **them** when they're hungry to come in and eat just a bunch of potato chips because that's all that's in the house, I try and make sure that there is fruit and veggies and tortillas and peanut butter things that would be better for them than to sit down and eat a big bag of Doritos or something. [Sandra]

> Because I also cook dog treats for **my dog** and so I look for the liver for my dog sometimes they'll put that on sale there too, so I just look. [Linda]

> I've gone there a few times just to, they have like a little Café area and sometimes I'll meet my parents there and we'll just get, because they have a lot of really good hot meals and so if I have an extra 30 minutes and I haven't seen my parents in a while I'll meet up with them there, because **they're** really into the organic natural foods and so we'll go there and I'll eat with them. [Erin]

The shopper's health orientation is not fixed toward self or others. The data provided by Gail clearly demonstrates the malleable nature of the health orientation. We see in the excerpts of her transcript the shift in orientation between her health and her family's health. She, as did others, express with clarity their interest in their health or the health of others, which has been demonstrated in the literature (Sparks & Shepherd, 1992). Interestingly, the data demonstrate a difference in frequency of shopper health orientation shift predicated on an identification as being in a parental role or as single. While it was not impossible to find single shoppers concerned about the health for others, it was clearly not the norm, which has also been shown in the literature (Geeroms, Verbeke, & Kenhove, 2008). However, shoppers with a parental role frequently demonstrated shifting health orientations between self and others.

In addition, the focus of the health concern also varied. As an example, a shopper may be concerned with *their* cholesterol, and *other's* food allergies. The data also demonstrate that an individual may simultaneously have multiple health concerns, which is not without precedent in the literature (Worsley & Skrzypiec, 1998). She may be concerned about fat and the impact on her cholesterol, as well as salt and the impact on her blood pressure and/or carbohydrates and the impact on her weight. For the health theme, it is not enough to simply identify the shopper's health orientation as, toward self or others, it is also necessary to identify the focus of her health concern for herself and/or others. This may require identification of multiple health foci with each requiring its own purchase solution message, targeting the unique health interests of the shopper.

While health is a high area of concern for shoppers so is security. In some of the data already provided it is possible to see that health and security are very highly related.

Security

Security, similar to health, presents itself in the data with a dual orientation which is sense of place, and financial. Sense of place can be described broadly as the sense of welfare and well-being resulting from a stable, safe and nurturing environment which is connected to the present and the past (Hay, 1998). As you will see in the excerpts from the data, this theme can cover a broad range of topics such as: memories, emotional well-being, togetherness, home environment and tradition. The following are representative excerpts from the data for the security orientation; sense of place:

> I remember Tracy once bought me for Christmas a whole case of Orangina and that's the only time I'd had it since I last visited France and then I found out that Fresh Market had it I was very excited. [Steven]

> …so I definitely love to shop and my mom is a nurse, and for fun we used to go shopping at the Mall, she's a bargain hunter so that was one of our main activities when I was a child was shopping. And the park we would go to the park and we would shop those were our activities. [Kristen]

> …has like fresh meat and then like in Korea they have some kind of chicken soup and I never maybe for me I couldn't find like fresh chicken raw chicken but they have like whole chickens. [Joan]

> I guess, when I was growing up at home like, my parents bought different types of chips but the ones that I ended up liking were the Doritos, and Lays barbeque, parents always end up buying what their children like the most. [Amber]

> No it's whenever I'm at my house that's what my parents use and I've just grown accustomed to the way it tastes and I like the way the organic dairy products taste. [Erin]

These references reflect a broad sweep from childhood memories and traditions, connections to other family members and the efforts put forth by the shopper to actively recreate or maintain connections to those important memories. Consumers have demonstrated the need for maintaining tradition through products (Luomala, Laaksonen, & Leipämaa, 2004). These traditions reflect both family and culture (Luomala, et al., 2004). Additionally, there are consumers who have been found at the opposite end of the tradition spectrum refusing to purchase any product with a history, instead, searching tirelessly for new (Luomala, et al., 2004). These data refer to home, or how it was done at home, which reflects specific place anchoring, a hallmark of this orientation. Sense of place gains security through the comfort engendered from grounding in the focal place (Hay, 1998).

This is however markedly different from the second security orientation which is overtly financial. This orientation is solely focused on the financial health and stability of the family. References in the data reflect shopper efforts to contribute to the financial security for her family. Examples of financial security can be seen here:

> Because if I know I can get it cheaper somewhere else, why would I buy it at the store...I guess it's the more money you have the better I guess…I guess it's because I like to have more money in my bank account, I guess it is for security reasons, the more money the better. [Steven]

> To be honest there was like no difference, a long time ago I used to only shop at Abercrombie, Hollister, like Polo and everything… Forever 21 is really good for the college students because we don't have that much money but they do still have some kind of trend that's going on. [Susan]

> Compared to Fresh Market, whenever I enter Fresh Market you see like, I can tell Wal-Mart tried to copy Fresh Market because they put the flowers at front but flowers don't look fresh in Wal-Mart…Yeah they want just lower price. I think that's Wal-Mart's value you know, lower prices and cheap product…For me even though I go to Wal-Mart for other stuff I always stop by Kroger. [Joan]

> Probably store brand wise I probably like Kroger better, just because; Wal-Mart and Krogers they do have the store brand stuff and they are better prices than what the brand names are sometimes. [Tom]

> Well I had another job and I lost it last February so it's kind of we're on a budget, we're on a budget and to stay within that budget you have to do some planning. [Sandra]

> I always go to the discounted meat section and see if there is something I like in there that I can throw in the freezer for later and I always do that and I ended up getting a couple of things there yesterday there is that little part of me that's trying to save money. [Linda]

Financial security efforts undertaken by the shopper are different than the efforts put forth to develop a sense of place. However they are not always mutually exclusive. As can be seen in Sandra's excerpt, planning in an effort to save money (financial) due to her job loss, is designed to help her maintain her home (sense of place).

Steven and Tom's excerpts demonstrate a "more is more" implementation of security. More can be about more food for the money as well as more money in the bank. Joan and Linda's excerpts demonstrate a balanced implementation of security. Balance is demonstrated as they each weigh their personal preferences (for store or product) with the need to demonstrate fiscal responsibility. Balance is achieved through differing approaches. Joan alters store locations, choosing stores for particular products, indicating that retailer can be important in brand and/or product considerations for the shopper. Linda on the other hand, is less dramatic altering which section in the same store she shops in. Linda expresses no change in her retailer or store location preference, but will look for a difference in brands or products found in different locations within the store. Finally, Susan experiences a wholesale shift in both what and where she shops as a reaction to her current financial status as a student. Even though this example is outside the food or CPG arena, it does clearly demonstrate that shoppers will go to considerable lengths, including changing not only retailers and brands but entire lifestyle choices to accommodate changes in finances or in an effort to maintain financial security.

Balance can be examined further as balance sheet. The sense of constraint associated by the shopper with finances introduces the idea of attempting to balance

productivity, financial outlay and return which are all similar to balance sheet considerations (Mishkin, Hall, Shoven, Juster, & Lovell, 1978). It has been demonstrated that for certain purchase categories (e.g., durable goods) this balance sheet approach can be quite often employed by consumers (Mishkin, et al., 1978). This research would indicate that the balance sheet approach is not necessarily bound to a product category (e.g., durable goods) for shoppers. In each purchase they are attempting to balance their present financial needs as well as desires against a perceived constraint and the knowledge that there are going to be future purchases. Therefore, engaging the shopper through messages which reflect for her some form of financial balance can be a valid form of value added messaging.

Shoppers require different messaging to support their security orientations. Joan's messaging requirement is toward both sense of place, with messaging tied to Korea, and financial with price information. Linda expresses no need for financial messaging, she is only interested in messaging in support of sense of place. Sandra, due to the loss of income, needs financial support through price messaging in order for her to adequately plan her purchases to maximize her limited budget. Sandra uses price messaging supporting her financial orientation to also support her sense of place. By saving money she can help to maintain her home. The driver at the core of security for most of the shopper's is family.

Family

Family is the most frequently occurring theme in the data. It is highly inter-related to security, health, and nurture. It was found to be at the top of virtually all of the value

ladders with the exception of two participants; Joan and Susan. Family was present in both of their data yet it failed to rise to the top of the value ladder. In both cases these participants were in a new and culturally different environment which forced issues of trust, health, and security to a level which superseded family. For all the other participants, the value themes supported family. The family theme can be seen in Barbara's data:

> …because I want to buy some special lamb for my family when I go back this weekend so I spent a lot of time finding the correct meat I can take back [Barbara]

> ..but here because we only shop once a week so it's like our family's social time if I can put it that way, so that means we're together we can go to the Chinese store and then. Also my son usually it happens on Friday because my son will have a guitar class and then that Chinese store is very close to the guitar class so after the guitar lesson we three family members will go together to that Chinese grocery store and after we do that we go to Wal-Mart to get the other things like eggs, milk those other things. [Barbara]

In these passages Barbara demonstrates the centrality of family in her decision making. She simultaneously balances security (sense of place) through the selection of her retailer for the "correct" meat, (lamb) and security (financial) for the selection of Wal-Mart for "other things". This represents the complexity of the shopping experience through the variety of needs to be met, sense of place, tradition and balance (Hay, 1998; Luomala, et al., 2004; Mishkin, et al., 1978). Barbara also reflects the constraint on time through the inclusion of shopping as a family activity. This allows her to complete the shopping assignment while embracing another activity "family social time" which otherwise would

have been in competition with the shopping time. In other excerpts from the interviews we can see similar scenarios play out as seen below:

> …my birthday is this week I'm trying to come up with a menu to feed my elderly parents who are actually pretty good as far as food, they had cauliflower and eggplant on sale so and they like eggplant, so I went ahead and picked up that. [Gail]

> …Well now for a special occasion yes we'll get the steaks and the shrimp and that for the special occasions but if you on a week in week out basis get the most for your dollar then that's okay. Well my husband wants a rib eye steak I try and find the best $6.99 a pound or you find when you spend more money. [Sandra]

Again, family is the primary concern for both Gail and Sandra. With the family, balancing is required to accommodate other value themes. Themes of health, security (financial), security (sense of place), and nurture are all being balanced by these shoppers in an effort to maximize the value for family. In Gail's case, she also exhibits nurturing, as a child toward her parents, sublimating her birthday dinner preferences, and prioritizing her parent's limitations and interests.

In summary, the findings from this data identify six value themes; family, health, security, community, nurture, and independence, through which the shopper will attempt to maximize her value as she engages in a shopping experience. Further, the data provide insight into two universal constraints: temporal and financial. The balance of this manuscript will be a discussion of the limitations, implications, future research and contributions of the study.

Discussion

Limitations

This study carries with it some limitations. One limitation may be generalizability. While efforts were made to assemble a mix of both male and female participants from diverse US and international locations, it cannot be said that the sample is truly a comprehensive demographic sample. A sample which is more closely matched to the overall U.S. demographic may provide additional insights into what U.S. shopper's value. This limitation also applies to theoretical saturation. While theoretical saturation was believed to have been achieved, that is based on the sample gathered. If the sample was more diverse it is possible that additional themes could have been identified.

A second limitation relates to the singularity of the product category, salty snacks. While each participant was encouraged during the initial stages of the interview to describe any shopping trip (some excerpts of which were presented), the focus was clearly on the purchase of salty snacks. Salty snacks, similar to most CPG products, lean more toward routine purchase products. It is not clear from this research how the examination of product categories which may carry more significance for the shopper would impact the themes. Examples of product categories which may carry more significance could be automobiles, engagement rings or real estate. The data includes examples of meaningful items (e.g., birthday meal products) it remains unclear if the significance of the product category would play a role beyond the results presented here.

The impact of the potential limitations identified in this research are not likely however to significantly alter the contributions of this research. This study provides

significant contributions to the theoretical development of shoppers, and their interaction with marketing and retail. Additionally this research provides significant insights for practitioners in retail and shopper marketing.

Implications for Retailing and Marketing

The first important finding from this research is the foundational differences between shoppers and consumers. The first difference notes that consumers lack an intention to purchase. In many cases, participants describe consumer oriented behavior with “browse or browsing”. In addition, participants used words and phrases such as research, look around, walk around and look, compare prices, and shopping for a break, to describe their consumer activities. This stands in stark contrast to the nearly uniform shopper activity description as “get in and get out”. One particular participant summed up the consumer orientation this way;

> …going and looking around at the store because even though I might not buy something on that day I've seen everything and I know what's there and it should be there the next time I go unless it's been too long of a time. [Amber]

Amber is neither specifically looking for anything, nor is there an identified purchase solution with a specified completion time. In fact, Amber acknowledges her lack of intention may be so great that the time lag between her browsing and shopping could render the product unavailable. Amber’s consumer reconnaissance may at some future point benefit a retailer or brand, however, until Amber identifies a specific need, it is unclear when, if ever, that benefit will be realized. Part of the loss to Amber, the retailer

and the brand, from this type of consumer behavior, is the inability to form salient messages which help co-create value with the shopper.

Retailers and marketers should employ targeted shopper messaging using all the avenues available to them including mass media (e.g., print, television or outdoor), email, web sites, and mobile, to help identify potential solutions for the shopper. They should use in-store messaging (e.g., signage, lighting, shelf talkers, carts, and floor media) in further support. The use of in-store displays can physically bring products together forming solutions for the shopper, which may have been disparate and difficult to identify across the store. The goal of the multiple message mediums is not necessarily to repeat a singular message, but to use the various media to support a variety of messages targeting potential solutions for a variety of shoppers. As was clear from the data, the shopper is not seeking a single solution even if they are shopping within a single product category. Therefore, an overt message may be offered which highlights convenience, reflecting the universal constraint of time, while a more nuanced purchase solution message could focus on memories or health in support of one or more of the six value themes.

The value themes identified in this research may be engaged by the shopper singularly or in combination. The shopper is anchored to theme(s) for which they seek to maximize value during their shopping experience. Value can be enhanced for the shopper through the intentional intervention of brands and retailers. When working in concert, brands and retailers can assist in shopper value optimization. Deliberate engagement to co-create value with the shopper may accrue residual value for either, or both, retailers

and brands. Residual value can contribute to the development of shopper loyalty for the brand and/or the retailer (Sirdeshmukh, Singh, & Sabol, 2002).

Co-creation of value requires that purchase solution messages and strategy between retailers and brand marketers be coordinated (Jones, 2005). Success depends on the development of a uniform direction for messaging and display projects, in support of the shopper for all media channels but particularly in store (Berman & Thelen, 2004). This is especially important for brand marketers, as shoppers are not necessarily seeking a single brand solution (Allenby & Lenk, 1995). Shoppers focus on purchase solution value maximizing, not on which company provides what brands to which retailers. To satisfy a shopper's goals, brands and retailers will require a new paradigm in how to best present shoppers with purchase solutions during the shopping experience. Shopper engagement may require retailers and marketers to leave their strategy of brand singularity, in favor of multi-brand combinations which aid in shopper solution optimization. Such an approach would require the coordination of multiple brand partners, including the retailer and their private label, in solution messaging which maximizes value for the shopper. These messages may include complementary partners, but also may include partners who are traditionally competitive. However, co-creating value with the shopper, either in or out of the retail environment, improves shopper's trust for the retailer and brands (Sirdeshmukh, et al., 2002). Solutions which the shopper perceives as optimized, reduce the need for margin reducing promotions (e.g., coupons, sales, bundles), resulting in enhanced sales and margin performance (Chandon, Wansink, & Laurent, 2000).

Another significant finding from this research which applies uniquely to shoppers are the two universal constraints: temporal and financial. Brand marketers and retailers should be cognizant of these constraints when developing solutions with shoppers.

The first constraint on shoppers is financial. The financial constraint results in shoppers prizing savings. This is especially true of CPG products or similar products where frequency of purchase serves to instantiate the price in the mind of the shopper (Dickson & Sawyer, 1990). Because of price familiarity (e.g., Sandra's quote of rib eye steak for $6.99 per pound), shoppers can associate the impact of cost fluctuations on the family budget. This is not however, an argument for strategies to only be oriented toward a reduced price message. The data in this study indicates that focusing on features and benefits which associate positively with one or more of the value themes can represent a "savings" for the shopper. As an example, this can be seen in this excerpt from Sandra:

> …cookies that they sell I've seen them and never tried one until there was a little lady sitting there and trying it and they are the best cookies, that's almost like a staple now, but I never would have bought it. Its two packages for $5.00 I never would have bought that unless that little lady was there sampling it. Well you can put peanut butter on it or Nutella, to me you're paying a little bit more but it's good, it's worth it. I think the taste and then also you serve it with that pumpkin dip that I like, so when you're invited somewhere for appetizers the pumpkin dip and the cookies you know by making that dip and getting those cookies one time you can take it two places because there is a lot of it.

Sandra identifies price as an obstacle to her value themes of security and financial, yet was moved to purchase through sampling. The tasting increased the value of the cookies as a snack item for her children enhancing her value themes of family and nurture. She overcomes her price concern which reduced her value for security and financial through

functionality benefits of the cookie. The cookie can serve as an appetizer for two events, thus creating a two for one savings message. This is just one example of the shopper assessing value to benefits which are not about price. The goal therefore, is to maximize benefits in relation to one or more of the value themes increasing value for the shopper relative to price.

The second constraint on shoppers is time. Temporally, shoppers prize convenience and quick resolution to their purchase need. Any effort by the retailer or the brand which assists shoppers in achieving their purchase solution more quickly will increase value for shoppers. Speed and/or convenience strategies are too many to detail here however, for clarity, these strategies reduce time spent during the shopping experience, and have no relationship to speed and/or convenience in product use.

The relationship between temporal constraints and convenience should be particularly interesting to retailers and the re-merchandising of their stores. The data make note that shoppers find re-merchandising an impediment to convenience, reducing their ability to quickly obtain the desired purchase solution. While not unknown to retailers, it is worth revisiting in light of this study. Time for shoppers, having been universally identified as constraining, indicates that re-merchandising is a particularly risky activity for retailers. Retailers who continue to believe that in-store re-merchandising is necessary, should engage shoppers to seek understanding about how they shop in their stores existing layout. Information about perceived layout dysfunction can lead to retailers uncovering potential value gains for the shopper which can be achieved through re-merchandising. Retailers who take these actions may also help to

ameliorate shopper concerns. Additionally, retailers and brands may uncover synergies through shoppers which had previously gone unnoticed.

Armed with that understanding, the retailer would benefit from messaging to shoppers early and often about upcoming in-store changes. Part of these messages should clearly identify where products have moved from and to, and why that is a benefit to shoppers. This study would indicate that it is beneficial to leverage the value theme of community toward the time constraint for re-merchandising. By adding additional help during and following the remodel, retailers can aid shoppers through the changes. Employees who can communicate the changes clearly and identify where products are now located, can generate positive value associations toward the retailer with the shopper. As a cautionary note, this research would indicate a significant downside for retailer's who use re-merchandising as a tool to increase shopper's in-store time. Time spent searching for products is not perceived by shoppers as beneficial and in fact seen as manipulative resulting in increased frustration. The frustration engendered by the shopper can have a negative impact on both retailers and brands (Stauss, Schmidt, & Schoeler, 2005). Both retailers and brands benefit from the creation of an environment which assists the shopper in attaining an optimized purchase solution.

Re-merchandising is just one example of change which can occur for the shopper during her shopping experience. The high degree of change in the shopping experience underscores the need to move shoppers from a static categorical approach to co-creation of value. Shoppers experience different needs and orient themselves toward a single or combination of value themes for each shopping occasion. The shopper employs unique

value themes by product. Therefore a single trip can be comprised of a variety of distinct value orientations. This results in the shopper creating a specific frame of reference for each shopping occasion in order to assess value for that shopping experience. For retailers and marketers the implication is clear. Shoppers who do not encounter a similar purchase need occasion, requiring a reactivation of a similar shopping reference frame, is increasingly unlikely to engage in the same purchase solution. Taken in combination, it seems therefore unlikely that a traditional category approach to shoppers would likely yield results with any predictive reliability. This is where the disconnect between valuing, satisfaction and loyalty begins.

It has been recognized in the literature that loyal consumers are generally satisfied (Oliver, 1999) meaning that the consumer who found value would likely fall into the loyal customer segment. Even Oliver (1999) acknowledges that satisfaction or positive valuing of the outcome does not predictably lead to loyalty. This indicates that placing a shopper based on prior purchase behavior, into a particular static shopper category, would fail to lead to reliable predictions of future behavior or loyalty. The inability to segment shoppers solely on prior behavior, absent any understanding for why she engaged in that behavior, is directly tied to valuing.

Shoppers engage in valuing by occasion. Shoppers accrue value to those products, brands, retailers and store locations which aid them most in obtaining maximum purchase solution value. In the absence of a shopping occasion which approximates a prior need, the shopper will utilize different value estimations for the present shopping occasion. This would indicate that shoppers are less oriented toward loyalty than they are toward

value optimization during their shopping experience. Retailers and marketers will generate more reliable positive value with shoppers when they can engage in co-creating optimal purchase solutions with shoppers. Overtime, the shopper who can associate more and more optimal solutions to a retailer and/or brands will have engaged more value themes and will become more loyal.

Future Research

This research is exploratory designed to identify future areas for research. Moving the context out of CPG into other product categories is one area which could offer insights. CPG products can be highly routinized purchases, so of interest would be examining purchases which are more unique in their occurrence. Especially interesting would an exploration of those items which are arguably purchased only once in a lifetime. For example, how would these themes play out for the purchase of a home or engagement ring?

Another avenue for study would be the role of environment in the shopping situation. The data in this research points to shoppers accruing value to the physical environment (e.g., Fresh Market vs. Wal-Mart). How significant is the role of the environment for the shopper? What is the role of the actual physical store itself? What is the impact of the neighborhood, other stores in the area, the parking lot, roadways leading to the store, neighborhoods through which the shopper may have to pass, and distance traveled to the store, on shopper value? While the data demonstrated some impact of these factors, the overall level of impact is not clear.

Culture is another avenue to pursue future research related to shoppers. While this study was entirely within the U.S., it should not be construed to speak for all U.S. shoppers. It should be anticipated that the themes highlighted here have the potential to differ in their application and weighting regionally within the U.S. as well as between large homogenous ethnic sub-populations. It is entirely within reason that Hispanic, Asian, African American sub-populations as well as Northeasterners, Midwesterners, Southern, and Mountain West regions would exhibit significant differences in their value theme orientations. This is completely disregarding culture from the international perspective, where differences would be anticipated across the globe.

Finally, examining the connection between satisfaction, value and loyalty should be explored. Is it reasonable that shoppers are only situationally loyal? Can shoppers generate value consistently over time and occasions to develop a more global and predictive loyalty? Is there a threshold that must be achieved in order for shoppers to develop loyalty? These and many more areas of study would greatly benefit our understanding of the shopper.

Contributions

This research began as an investigation into shoppers and what they value. The data gathered led to several significant findings related to shoppers as well as identifying their differences with consumers. While exploratory, this research benefits the literature by providing new insights into the shopper.

One of the first significant contributions from this study is the existence of two universal constraints on shoppers which are; temporal and financial. Shoppers universally

felt time compressed as there is a sense that some other project or activity is vying for the same time that shopping is consuming. This leads to a shopping orientation being pulled in opposite directions. On one side the shopper desires to maximize their value, while on the other she desires to minimize her time spent.

Similarly, shoppers also felt constrained financially. The shoppers all acknowledged that funds used for this purchase could put limits on future purchase needs. Therefore, spending on the present purchase serves to highlight the finite nature of the shopper's finances.

Equally important is the understanding that these constraints are unique to shoppers. Consumers are not impacted by these constraints. Consumers consider products in the abstract. Since there is no identified need to purchase, consumers are free to spend whatever time they wish, considering products at whatever price. The missing purchase intent results in consumers experiencing no perceived negative impact toward either the financial or temporal constraint. The constraints on shoppers however, whether perceived or real, are a critical component in shaping how the shopper optimizes her purchase solution.

Separate from the constraints are the six main value themes. The themes; *family, security, health, nurture, community, and independence,* represent different organizing value schemas which guide shoppers through the shopping experience. The themes are not mutually exclusive and can be engaged singularly or in combination. This is true even as some of the themes may seem to appear to be in conflict (e.g., community and

independence). The themes help provide an understanding of the orientation the shopper has as she approaches the shopping experience. The application of a theme(s) directs the shopper toward a purchase solution optimized for the commensurate value schema.

This research provides significant new contributions to the literature further distinguishing shoppers from the consumers. This research adds detail to themes which support a value framework engaged by the shopper singularly or in combination. As such, this research provides valuable insights for both researchers and practitioners. Future researchers are encouraged to follow this study with additional research to increase our understanding of the impact of value themes on shoppers.

CHAPTER FOUR – STUDIES

QUANTITATIVE STUDY

Shopper Value Framework: An Empirical Test of the Framework and an Examination of the Impact of Importance, Shopping Context and Shopping Social Situation on Shopper Purchase Solution Outcomes

ABSTRACT

Shoppers can be described as unique from consumers in five important ways: actively engaged in a purchase solution, external elements (e.g., retailer) are important, clear definition of purchase target, situationally motivated, and responsive to a highly dynamic environment. These differences create a framework, unique from consumers, through which the shopper makes purchase decisions. The shopper framework reliance on detail implies that shopping outcomes may, and most likely will differ from those which would be predicted from the more generalized consumer perspective. Further, what the shopper finds of value may change within the shopping experience.

This study proposes a framework for shopper value and examines three factors which may impact that value: perceived occasion importance, perceived recipient importance, and social shopping situation. Each of these factors independently or in combination can alter value for the shopper for a particular shopping experience. An online survey using a 2x2x2 experimental design is administered to 540 participants. Structural equation modeling is used to evaluate the relationships within the shopper value framework: regressions examine the effect of consumer beliefs on shopper

outcomes, and a series of with-in group ANOVA's analyze the strength of the mean differences between consumer beliefs and shopper outcomes. The results indicate that the shopper framework is representative of how shoppers approach the shopping experience. The results also indicate that in almost all cases, situational variables drive the shopper to frame value in a manner which varies significantly from the consumer beliefs. The impact of these changes for marketers and retailers are discussed.

Introduction

Value, customer value, and values have a long tradition in the literature spanning more than a century. The value literature has been used to describe a consumer behavior model which is hierarchical and moves the consumer from generalized need acknowledgement, through repeat patronage, which is represented in Figure 13. The hierarchy functions as a practical representation of consumer behavior. However, the simplicity of the model comes at the expense of precision. The hierarchy, through its unidirectional progress implies that once the consumer is engaged in the process, she would methodically complete each stage and move forward to the next. However, consumers consideration of products is often generalized bearing no requirement for action. This would belie the implied progression of the consumer model. Additionally, the consumer hierarchy provides no access point indication for influences (either internal or external) which may impact a consumers progression (Xia & Sudharshan, 2002).

The shopper, different than the consumer, is pressed to achieve a solution, once a need occasion has been acknowledged. She will also be required to respond at many different points to the influences of a variety of stimuli which occur throughout the

shopping experience. The consumer behavior model is somewhat imprecise in its representation of consumers and therefore, wholly inadequate for describing the behavior of shoppers. A further difference between the consumer and shopper models is that the final stages of the consumer model, reflection and repeat patronage, are post-purchase behaviors and are beyond the shopper experience which concludes at purchase. The shopper, unlike consumers, moves along a "path to purchase", beginning with a need occasion recognition and culminating at the point of purchase (Schober, et al., 2011). Therefore, the consumer behavior hierarchy, while adding insight, is inadequate for use in describing shopper behavior, providing the need for a shopper framework.



Figure 13. Consumer Behavior Hierarchy

Shoppers are distinguished from consumers in the literature in five important ways: active engagement in a purchase solution, external elements (e.g., retailer) are important, clear definition of purchase target, situationally motivated, and responsive to a highly dynamic environment (Bliss, 1960; McCracken, 1986; Westbrook & Black, 1985; R. B. Woodruff, 1997). The shopper is more attuned to nuance and change within her environment than the consumer (McCracken, 1986). The uni-directionality implied in the consumer hierarchy does not account for the dynamics in the shopper's environment further undermining its applicability.

The generalized product acknowledgement found in the consumer model, while sufficient to initiate product ruminations with consumers, is entirely inadequate for framing action, which is required of shoppers. The purchase task requires shoppers to understand the specifics of the purchase need occasion, in order to form course of action leading to a purchase completion. The generalized consumer regard for products is not beneficial for purchasing and is noted as a foundational element in purchase delay (Greenleaf & Lehmann, 1995). Research has identified ten themes associated with consumer purchase delay (See Table 16) The first seven reflect the lack of need clarity with consumers (Greenleaf & Lehmann, 1995). The next two themes reflect universal constraints on shoppers; time and money (Greenleaf & Lehmann, 1995; Jones, 2012).

The final theme reflects consumers orientation toward the shopping activity, which is a general dislike (Greenleaf & Lehmann, 1995). Unfortunately, the shopper cannot indulge in consumer delay tactics as their time frame for purchase completion is well defined. In order to better represent the dynamic environment and drive

Table 16 *Reasons for Consumer Delay*

Consumer Delay Categories		
Need Clarity	**Universal Constraint**	**Shopping Orientation**
Uncertain of Need Insufficient occasion information Occasion absence (social/psychological risk) Occasion absence (performance/financial risk) Insufficient product Information Insufficient market information Insufficient substitute information	Time Finances	Shopping unpleasant

purchase completion which typifies shoppers, the shopper value framework (SVF) has been proposed. This research is designed to examine the proposed relationships within the framework, and its applicability to the shopping experience and shopper value.

The SVF is grounded in the theory of reasoned action (TRA) which models the relationships between beliefs, attitudes, and intentions leading to behavior (Fishbein & Ajzen, 2010). Through TRA, significant relationships can be demonstrated between beliefs, which inform attitudes, impacting intentions leading to behavior (provided the measurement is consistently toward the behavior) (Montano, et al., 1997). A representation of the model can be seen in Figure 14. These relationships provide a foundation for representing shopper movement on her path to purchase and value assessment.

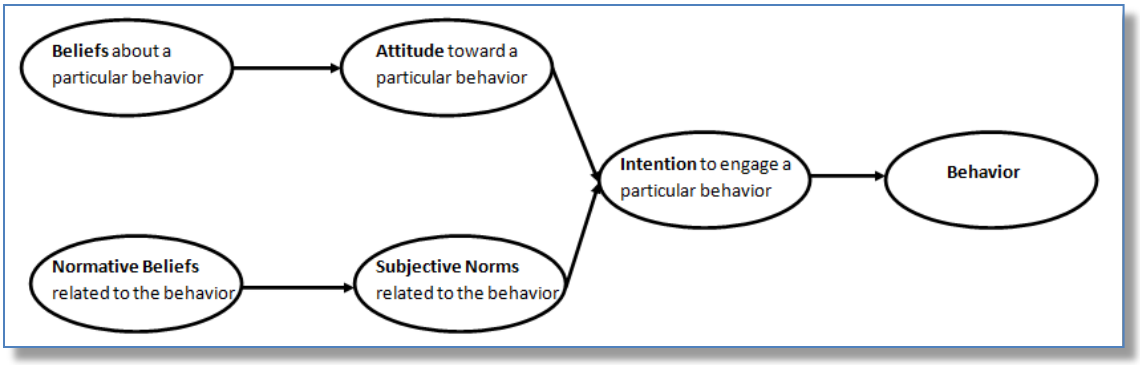


Figure 14. Theory of Reasoned Action Model. Adapted from *Belief, attitude, intention and behavior: An introduction to theory and research* (p. 16), Fishbein and Ajzen, 1975, Reading, Massachusetts: Addison-Wesley Publishing Company. Copyright 1975.

The SVF like TRA, begins with beliefs regarding a behavior. Beliefs toward a behavior inform the shopper's attitudes toward her engagement in that same behavior (Fishbein & Ajzen, 1975). Normative beliefs toward that same behavior inform subjective norms which she believes to be associated with the behavior (Fishbein & Ajzen, 1975). Both of these belief forms can be found in the need occasion construct of the SVF. Her attitudes and subjective norms toward that same behavior impact her intention toward engaging in the behavior (Fishbein & Ajzen, 1975). Attitudes and subjective norms are found in the shopper occasion perception construct of the SVF, while her intentions are represented by the shopper targeting construct. The conclusion of the TRA model is a behavioral outcome ranging dimensionally from definitely not engage to definitely engage in the behavior (Fishbein & Ajzen, 1975). Behavioral engagement in the SVF is represented by the shopper experiencing construct. The SVF at its conclusion moves beyond TRA through the assessment of value by the shopper for her experience. Each of the elements prior to shopper value within the model are assessed by the shopper for the relative weight it bears toward her decision to engage in the behavior

(Fishbein & Ajzen, 1975). The framework can be seen in Figure 15, with a comparative representation of the theory of reasoned action (TRA).

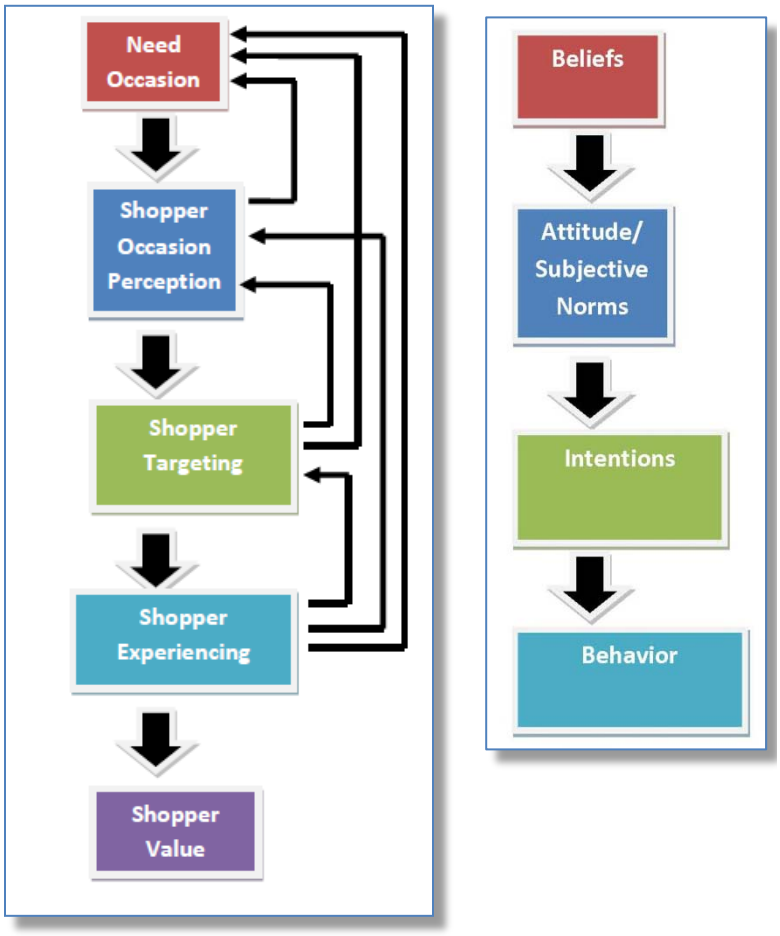


Figure 15. Shopper Value Framework and Theory of Reasoned Action

The SVF is designed to specifically accommodate the highly dynamic and iterative process which typifies shopping. At any point prior to the assessment of value, the shopper may find herself re-evaluating her situation based on new and relevant information. As a result of changes she encounters, she may need to move backward into

the framework to a prior stage to develop a new structure which represents her new solution for the shopping experience. Throughout this back and forth within the framework, multiple touch points exist to address value with the shopper. The framework's focus on shopper value assessment provides at each stage the opportunity for retailers and brand marketers through their interaction with the shopper, to add value (Jones, 2005). The shopper assesses value from her entire shopping experience, and through this framework, additional research can be conducted to further our understanding of how she assesses value.

In addition to furthering the academic conception of shopper behavior, industry, particularly CPG companies, continue to increase its investment in shopper marketing methods, driving yet another need to understand how shoppers ascribe value. Brands (particularly in CPG areas) are rapidly adopting a shopper approach to marketing (J. Neff, 2007). However, marketing outcomes lacking a shopper orientation can only be evaluated from a consumer perspective, which we have seen is inadequate for addressing shoppers. In order to facilitate co-creation of value between brands, retailers, and shoppers, it is incumbent on researchers to identify those elements which impact value for the shopper. Only through enhanced appreciation for shopper value can marketers identify when shoppers are receptive to value messaging, and which of their offerings serve to enhance shopper value. The SVF examined in this research can provide a platform for developing metrics which can demonstrate message effectiveness with shoppers. In order to test such a comprehensive framework, the examination will be performed using an on-line methodology using a survey with an experimental design.

The survey, in addition to assessing the applicability of the overall framework, will also examine three key elements which may impact value outcomes for the shopper: perceived occasion importance, perceived recipient importance, and social shopping situation.

The balance of this manuscript will be organized into the following sections. First will be a review of the literature relevant to the theoretical framework of the research model designed to test the SVF. Within the review of each construct, the associated hypothesis(es) will be offered. The review will be followed with a discussion of the study model, variables and study design. A review of the results and the implications will be provided, followed by limitations, future research and study contributions. We begin with the review of the theoretical framework.

Theoretical Framework and Model Development

Theory of Reasoned Action

As the foundation for the SVF, it is only fitting that the theory of reasoned action (TRA) also serves as the driving force for the research model. As previously mentioned, TRA represents a model for examining the relationships between beliefs, attitudes, and intentions leading to behavior (Fishbein & Ajzen, 2010). These simple concepts from a conceptual standpoint become exceptionally difficult to operationalize from a study design perspective. This is made more so when the model is testing a composite of these simple variables. First we examine beliefs which in the SVF are represented by need occasion. However, from a study perspective, beliefs need to be specific and identifiable in order to be measured (Ajzen, et al., 1996). In the following section is a brief discussion of beliefs from a TRA perspective followed by a discussion of the test variables in the

research model. The research model can be seen in its simple form in Figure 16 and its expanded form in Figure 17.

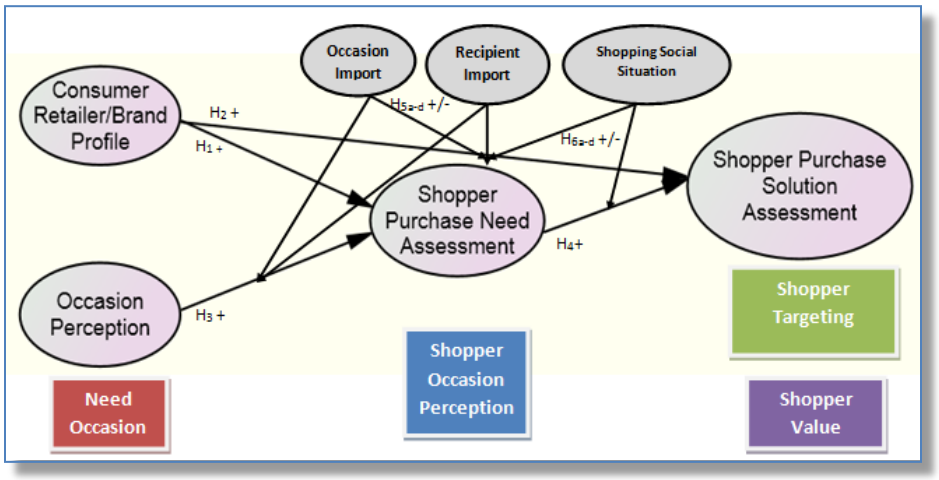


Figure 16. Research Model Second Order Constructs Only with SVF Overlay

Beliefs

Beliefs, as are all of the elements of TRA, need to be specific and oriented toward the behavior (Fishbein & Ajzen, 1975). Through those specific beliefs, shoppers assess attributes, which she has identified as appropriate (Ajzen, et al., 1996). Based on her assessment of the purchase need occasion, she will use those assessments to guide her purchase behavior (Fishbein & Ajzen, 1980). Beliefs are inwardly oriented for the shopper and are reflective of her personal assessment of the behavior to be engaged (Fishbein & Ajzen, 1975). Beliefs, in this research, are oriented toward the purchase of salty snacks. Therefore, shopper beliefs for this research must correspond to their beliefs toward the purchase of salty snacks, not simply their beliefs about the snacks themselves (Ajzen, et al., 1996). These beliefs reside in the model within the construct of consumer retailer/brand profile.

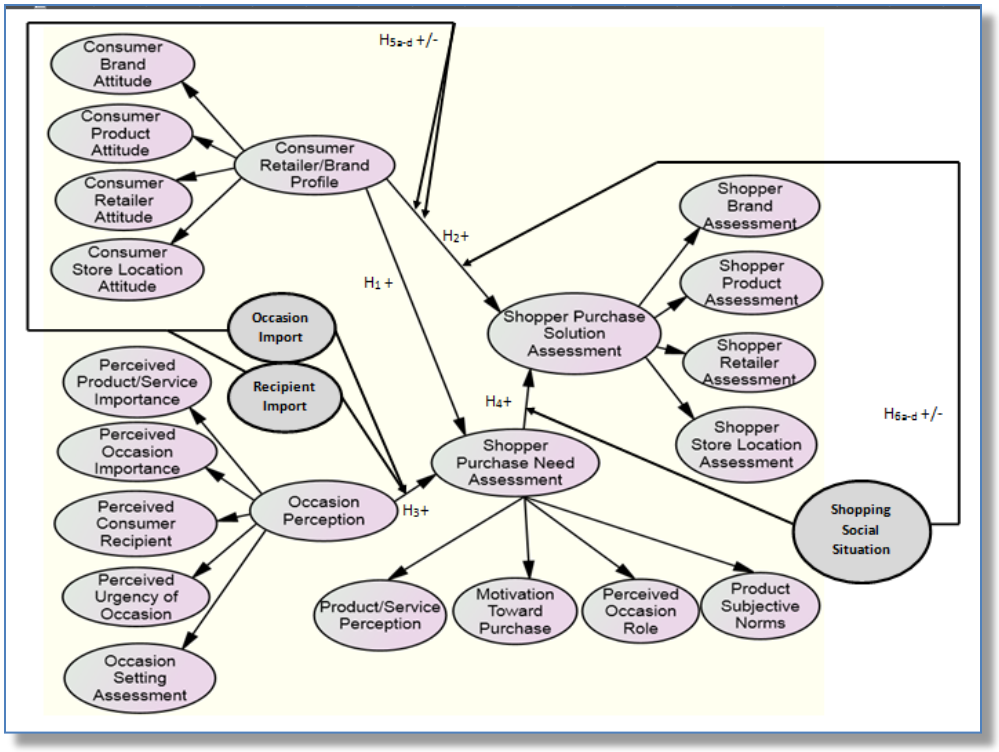


Figure 17. Research Model Inclusive of First Order Constructs

Consumer Retailer/Brand Belief Profile

Beliefs which represent a consumers orientation toward products, brands, retailers, and store locations, are the result of experiences which the individual has accumulated over time (DeSarbo & Choi, 1998). The consumer's belief profile is one of two exogenous measures in the study. Consumer beliefs are most readily found through a shopper's initiation of an internal search. These beliefs are comprised of information gained from prior searches, marketing materials, word-of-mouth, and unbiased information providers (DeSarbo & Choi, 1998). Additionally, an important source of information for internal search comes from prior experience (DeSarbo & Choi, 1998). From a risk reduction perspective, the most potent forms of internal search are based on loyalty (Villas-Boas, 2004) or routine (Novemsky & Kahneman, 2005). For the purposes

of this research, salty snacks have been selected for their tendency to elicit high levels of loyalty and the routine nature of their purchase (Beharrell & Denison, 1995). The routine purchasing of salty snacks would generate significant specific beliefs toward brands, products, retailers and store locations. Additionally, for the purposes of this research, the shopper's involvement in this type of purchase is subject to manipulation (Beharrell & Denison, 1995). Based on the likelihood that the shopper will have strong beliefs toward the purchase of salty snacks, the following hypothesis is proposed.

H_1: Consumer retailer/brand belief profile maintains particular attitudes about brands, products, retailers and store locations which positively influence her attitudes in the shopper need occasion assessment.

In many cases, the belief that something possesses the appropriate attribute is enough to reduce search to the most cursory level (Duncan & Olshavsky, 1982). The strength of the belief reducing search and therefore relying only on prior history is also important for this research. Salty snacks, bearing the likelihood to engender strong loyalty, are particularly appropriate for this research (Beharrell & Denison, 1995). Loyalty has been described as a form of competitive insulation allowing for continued engagement regardless of market pressure (Wulf, Kristof, & Iacobucci, 2001). Therefore, the following hypothesis regarding the consumer retailer/belief profile and its impact on shopper purchase solution assessments is offered.

H_2: Consumer retailer/brand belief profile in some circumstances may be so deeply imbedded, and have such a significant impact on the solution intention, that no amount of occasion, context or social situation manipulation, will render any change from the consumer belief profile to the shopper's purchase solution assessment.

In addition to beliefs, the TRA also references normative beliefs which will also impact the shopper's attitudes toward a solution.

Normative Beliefs

Normative beliefs, different from beliefs just described, are outwardly oriented. Normative beliefs reflect the shopper's assessment of others' expectations toward their engaging in the behavior (Fishbein & Ajzen, 1980). These others are perceived by the to be important to her and therefore their opinion has a real impact on her decision process (Fishbein & Ajzen, 1980). The shopper assesses whether the others would, or would not, support her engagement as well as how she chooses to engage in the behavior. The normative referents positive or negative assessment influences her attitude and intentions for engaging in the behavior. In this study normative influence would either support, or not-support, the purchase of salty snacks (Fishbein & Ajzen, 1975). However, these normative beliefs reflect a variety of behaviors associated with the purchase identified by the shopper. This results in a set of beliefs or belief category (Ajzen & Fishbein, 1980). Unfortunately, categories are not as a group observable and instead must be examined through individual behaviors which they represent (Ajzen & Fishbein, 1980).

Shopper Occasion Perception

Normative beliefs reside, for the purposes of this research, in shopper occasion perception, the second exogenous variable in the study. In this construct the shopper holds normative beliefs toward the product/service, occasion, recipient, urgency, and the occasion setting. The product/service reflects the shopper's assessment both personal and from others, of the importance the product/service has for the occasion. Task definition is described alternately as a cognitive or hedonic/affective assessment (Holbrook & Hirschman, 1982). The cognitive assessment reflects the shopper seeking out others' beliefs toward finding a task solution, and affective assessment reflects internal search

aimed at risk avoidance for the shopper (Holbrook & Hirschman, 1982). The occasion and recipient assessment reflect the shopper seeking important information regarding the event and the recipient, from their own as well as others perspective. Importance is a measure of the anxiety the occasion brings to the shopper, which increases proportionately with the percieved level of importance (Schlenker & Leary, 1982). Occasion importance increases social anxiety tied to shopper impression management (Wooten, 2000). Recipient importance increases interpersonal relationship anxiety associated with intimacy management (Wooten, 2000). Urgency examines the shopper and other's assessment of the timeliness of shopping task completion. Urgency, or lack thereof, can result in *v*alue reduction for the shopper through the introduction of stress (S. Cohen, 1980). Stressors can combine and including the conflict between personal and others assessment of urgency for the task completion, further reducing value (S. Cohen, 1980). Finally, the setting itself comes with its own set of normative beliefs associated with an occasion. Settings are impacted by personal as well as others beliefs about time, space, and cultural definitions associated with the occasion setting (R. W. Belk, 1975; Gardner, 1985; Stayman & Deshpande, 1989). Therefore, these separate measures serve as a composite representing the shopper's occasion perception which is her normative beliefs toward the purchase of salty snacks. Based on this understanding the following hypothesis is proposed.

H_3: Occasion perception positively impacts the shopper purchase need assessment through the introduction of occasion specific and normative beliefs toward the shopping need required for a specific event.

Attitude

Attitudes are learned over time through response and consistency of response (Fishbein & Ajzen, 1975). The specificity of the attitude increases its impact toward intentions which influence behavior. Attitudes can also relate to consequences, either positive or negative, resulting from behavior engagement. Attitude strength is closely related to the individual's perception of the consistency of outcome consequences. The consistency of the consequence can have either a negative or positive orientation, which then either reinforces or reduces the attitude strength (Fishbein & Ajzen, 1975). Attitude strength can further reinforce the intention leading to repeated behavior resulting in increased repetition of the outcome (Côté & Levine, 2000).

Subjective Norms

Subjective norms represent socially approved behavioral reference points for the shopper which she has a commitment to comply with (Fishbein & Ajzen, 1975). The stronger her motivation is to comply with the norms, the stronger her attitude is toward engaging in the normative behavior as opposed to any other behavior (Ajzen & Fishbein, 1980).

Shopper Purchase Need Assessment

Attitudes are represented in the research model in the shopper purchase need assessment construct, as are subjective norms. Attitude will be discussed initially, followed by subjective norms and their relationship to shopper purchase need assessment. Within shopper purchase need assessment are four sub-constructs: product/service need perception, motivation toward purchase, perceived occasion role, and product subjective norms.

Product/service perception reflects the shopper's assessment of the product/service required for the occasion. Her perception is bound by her present knowledge, experience and preferences related to the product/service (Bettman & Jacoby, 1976). Additionally, the environment in which she perceives the need as well as her assessment of the environment in which the product/service will be employed, also influence her perception (Gilbert, et al., 2002). Product/service perception is also comprised of cognitive and affective elements (Sanzo, Río, Iglesias, & Vazquez, 2003). The combination of these elements, along with prior history and environmental aspects, form a holistic product/service perception for the shopper (Sanzo, et al., 2003).

For shoppers, motivation to shop is comprised of one or a combination of the seven different dimensions which are: role, choice optimization, affiliation, utility, negotiation, power, and stimulation (Westbrook & Black, 1985). Motivation for completing the purchase of the product/service need through shopping represents the shopper's perception of the consequences, which will result from their purchase selection (Batra, et al., 2001). These consequences are often influenced by an assessment of the shopper of importance related to the occasion and the product/service (McClintock, 1972).

Role for the shopper reflects how she sees herself in relation to the occasion (Van Lange, et al., 2007). Each role engaged by the shopper carries certain pre-determined cultural expectations (McClintock & Liebrand, 1988). Cultural expectations provide a culturally appropriate script for the shopper which helps to shape her intentions toward the purchase (Van Lange, et al., 2007).

For the shopper, the subjective norms are related to the purchase of the product or service required for the need occasion (Wieseke, et al., 2008). Subjective norms reflect the shoppers understanding of and willingness to comply with the wishes of others regarding the purchase need (Ajzen, 2010). The shopper's attitudes and subjective norms combine to impact her intentions toward the purchase of the product or service required for the need occasion. Therefore the following hypothesis is proposed.

H_4: Shopper purchase need assessment reflecting the shopper's motivation, role, perceptions of the product/service and subjective norms will positively impact shopper purchase solution assessment.

Intentions

Intentions represent the likelihood that the behavior will be undertaken, and range dimensionally from weak to strong (Ajzen & Fishbein, 1980). Intentions are predicated on attitudes and subjective norms which are subject to change, as the shopper through continued experiences learns from and alters their beliefs and attitudes toward a behavior (Fishbein & Ajzen, 1980). Intentions in the research model are represented by the shopper purchase solution assessment.

Shopper Purchase Solution Assessment

Shopper purchase solution assessment reflects the shopper's intentions toward optimized purchase solutions. Shopper purchase solution assessment reflects a process of attribute and benefit evaluations which result in an intention to engage in the behavior which will secure the most appropriate solution through brand(s), products(s), retailer(s), and store location(s. (McCracken, 1986; Spreng & Olshavsky, 1993). Each of these four sub-constructs (brand, product, retailer, and store location) will receive an assessment by

the shopper of its importance in generating the optimum solution (Spreng & Olshavsky, 1993). As a result, we can examine the mean difference in importance values between these same sub-constructs (brand, product, retailer, and store location) which exist in both, the consumer retailer/brand profile and shopper purchase solution assessment, as a surrogate of value change for the shopper (Flint, 1998).

Moderators

Within these relationships certain elements related to the occasion act as moderators which intercede, altering the strength of the relationship between the variables as described (Beehr, 1976). In the scenarios included in this study, there are three such moderators: importance to the recipient and for the occasion, as well as the social shopping context.

Social shopping situation can have a significant impact on the relationship between the shopping occasion perception and the shopper purchase solution (R. W. Belk, 1975; Machleit & Eroglu, 2000). Social shopping situation relates to one of three orientations: self, with another supportive, and with another not-supportive. These situations reflect social norms which are in some cases introduced by others into the shopper's evaluation process (Fishbein & Ajzen, 1980). This research examines two of the shopping social situations. Self refers to the shopper undertaking the shopping trip alone, while not-supportive refers to the shopper engaging the shopping trip with another individual(s), who does not support the shopper's behavior within the shopping environment, and/or does not support the products she is purchasing. Both self and with others supportive, encourage the shopper in her pursuit. However, with other not-supportive serves to discourage the shopper from her planned pursuit in order to

minimize conflict (Evans, Christiansen, & Gill, 1996). In addition to social shopping situation, another moderator is perceived importance.

Occasion and recipient perceived importance by the shopper affects her attitudes and intentions for fulfilling her purchase (Goldstein, 1990). How she ascribes weight to attributes associated with the occasion and recipient determines her assessment of importance (Goldstein, 1990). Even if the attributes used in the assessment remain the same, importance will vary if her goals for the occasion differ (Goldstein, 1990). Importance adds anxiety for the shopper which increases proportionately in line with the increasing level of importance (Schlenker & Leary, 1982). Occasion importance increases shopper social environment anxiety which stresses her impression management (Wooten, 2000). Recipient importance increases anxiety oriented toward her interpersonal relationships (Wooten, 2000). These assessments of importance can cause conflict when they are in opposition for a single occasion adding tension between social and interpersonal relationship goals (Wooten, 2000).

Importance impacts the shopper's certainty level. Importance associated with either or both recipient and occasion will drive a connection to prior experience as a heuristic for past performance (Sorrentino, et al., 1988). However, when importance is high for both recipient and occasion and the social situation is not-supportive, the increase in perceived risk by the shopper will reduce the use of heuristics and press the shopper to be evaluative in their solution set (Sorrentino, et al., 1988).

Therefore, based on the literature, we can propose the following hypotheses in order to test the moderation impact of these variables within the model. Moderation will

be examined through two different relationships. First is a linear relationship between the dependent variable (DV) shopper purchase solution assessment and the independent variables (IV) in consumer retailer/brand profile. The second relationship is a within group means difference between the sub-constructs related to the DV and IV, which can be paired along related foci. The following hypotheses represent these dual investigations and the proposed outcomes. (Note: In all cases the shopping context is quick fill-in) A recap of the scenario manipulations can be found in Table 24, Appendix D. Hypothesis H_{5a}, for clarity, details the cell treatment description, linear relationship elements and proposed outcome, followed by the within group elements description and proposed outcome. The remainder of the hypotheses will be tested as in H_{5a}, however, for brevity, will only describe the treatment and hypothesized relationship outcomes.

H_{5a}: For treatment cell 1 (shopping context is quick fill-in, shopping social situation is **alone,** occasion perception is **un**important, and recipient importance perception is **un**important), the independent variable (IV), consumer retailer/brand profile, will **not** be a significant predictor of the dependent variable (DV), shopper purchase solution assessment, and the sub-constructs within consumer retailer/brand profile (CRBP) and shopper purchase solution assessment (SPSA) when paired (e.g., brand, from consumer retailer/brand profile and brand, from shopper purchase solution assessment, similarly for the remaining sub-constructs, product with product, retailer with retailer, and location with location) **will** demonstrate significant differences between sub-construct means.

H_{5b}: For treatment cell 2 (shopping social situation is **alone,** occasion perception is **un**important, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{5c}: For treatment cell 3 (shopping social situation is **alone,** occasion perception **is im**portant, and recipient importance is **un**important) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{5d}: For treatment cell 4 (shopping social situation is **alone,** occasion perception is **im**portant, and recipient importance is **im**portant) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{6a}: For treatment cell 5 (shopping social situation is **with another** not-supportive, occasion perception is **un**important, and recipient importance is **un**important), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{6b}: For treatment cell 6 (shopping social situation is **with another** not-supportive, occasion perception is **un**important, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

H_{6c}: For treatment cell 7 (shopping social situation is **with another** not-supportive, occasion perception is **im**portant, and recipient importance is **unim**portant) the IV **will** be a significant predictor of the DV, and the paired sub-constructs will demonstrate **no** significant differences between sub-construct means.

H_{6d}: For treatment cell 8 (shopping social situation is **with another** not-supportive, occasion perception is **im**portant, and recipient importance is **im**portant), the IV, will **not** be a significant predictor of the DV, and the paired sub-constructs **will** demonstrate significant differences between sub-construct means.

Methodology

In order to test these hypotheses, experimental control is required to manage the three moderator manipulations, implementing a 2 x 2 x 2 within group design. The manipulations within the experiment were predicated on hypothetical scenarios which called for the respondent to accept as pertaining to him/herself. The scenarios contained elements which manipulated three variables relative to our experiment; perceived importance of recipient, and occasion, and shopping social situation. In addition to the manipulation, the experimental model contained two exogenous variables, one endogenous variable and the dependent variable. The research model used in this study

was shown previously in Figures 18 and Figure 19. The first figure represents the second order factor model and the second figure represents the first order sub-factors as well. Indicated on each model are the relationships as hypothesized.

Variables

The independent variables within the research model represent measurable aspects of need occasion which is the initiation point of the shopper value framework (SVF). Each of these constructs is multi-dimensional. Consumer belief profile is comprised of four sub-constructs while shopper occasion perception is comprised of five. The consumer belief profile reflects the shopper's beliefs toward the purchase need which she, through prior experience, brings to the shopping occasion, which for the purposes of this research is construed as:

> *Consumer Belief Profile:* a multi-dimensional construct, comprised of the consumer's beliefs toward brands, products, retailers, and store locations. These beliefs represent the sum of the consumer's experiences with particular brands, products, retailers, and store locations. These experiences may be actual, second hand (word-of-mouth) or perceived as a result of communications which the consumer received in reference to brands, products, retailers, and store locations.

Shopper occasion perception represents the beliefs and normative beliefs the shopper has toward the occasion, product and environment of the occasion (R. W. Belk, 1975). The construct is described further, below:

> *Occasion Perception:* a multi-dimensional construct comprised of two belief sets: the first is the shopper's beliefs toward specific product or service need; the second is her beliefs regarding the occasion itself. The beliefs are engaged through the shopper's recognition of the occasion. The beliefs which comprise occasion perception are represented by five sub-constructs: perceived product/service importance, perceived occasion importance, perceived recipient importance, occasion urgency, and occasion assessment. The shopper through

these sub-constructs frames her beliefs toward the need and the occasion which help define the shopper's attitude toward an appropriate solution.

Perceived Importance: three importance sub-constructs (product/service, occasion, and recipient) represent the shopper's assessment of how important these elements are to her. Importance is gauged through the familiarity the shopper has with the product/service, occasion, and recipient, specified for the occasion. The more certain she is about her beliefs of importance, the more clearly she can set her attitudes toward the purchase solution. Lack of familiarity reduces this certitude making predictions of the behavioral outcome less reliable.

Occasion Urgency; a dimensionally oriented measure of spatial and temporal beliefs the shopper has toward the occasion. Urgency is driven by the event type and the shopper's perception. Closely tied to occasion importance, shopper assessment impacts how she perceives urgency toward the event.

Occasion Assessment: the shopper's overall assessment of the occasion environment. This construct measures the shopper's beliefs toward when the occasion will occur, its duration, who else is involved in the occasion and the location of the environment.

The endogenous multi-dimensional third construct, shopper purchase need assessment, represents the second stage of the SVF, shopper occasion perception. The four sub-constructs represent the shopper's attitudes toward the product/service need, motivation to purchase, role and subjective norms. These sub-constructs are described further:

Shopper Purchase Need Assessment: a multi-dimensional construct which is reflected in four sub-constructs. Together they comprise the shopper's evaluation of how she sees herself within the confines of the occasion, which generated the shopping need. The four sub-constructs for shopper purchase need assessment are: motivation toward purchase, perceived occasion role, product/service perception, and product subjective norms. These elements represent the shopper's attitudes, based on the beliefs from need occasion, toward the purchase need. These attitudes will help define her intentions toward the completion of the shopping required to fulfill the product/service need found in the final construct of the quantitative model.

Motivation Toward Purchase: the shopper's attitudes toward fulfilling the requirements of the product needed for the occasion. This reflects the shopper's attitudes toward not only the product, but the shopping required and the importance of the recipient and the occasion.

Perceived Occasion Role: the shopper's attitude toward her role for the occasion. Reflected in this is her perception of her importance in the occasion as well as the importance to her of the occasion itself.

Product/Service Perception: the shopper's attitude toward the product/service need. This represents how important she feels the product is to herself as well as the occasion.

Product Subjective Norms: the shopper's perception of the subjective norms related to the product/service, and in particular, how those norms fit within the context of the occasion. The subjective norms reflect how the shopper views the social rules which guide the selection of a product which has been stipulated for the occasion.

The dependent variable, shopper purchase solution assessment, represents the shopper targeting stage of the SVF. Shopper purchase solution assessment is comprised of four sub-constructs which reflect her intention toward the purchase solution and can be described:

Shopper Purchase Solution Assessment: the outcome preferences the shopper has toward fulfilling her shopping need. Based on the shopper's attitudes from shopper purchase need assessment, the shopper forms intentions to purchase which optimize her value. The shopper purchase solution assessment is a multi-dimensional construct composed of the shopper's assessment of (1) products, (2) brands, (3) retailers, and (4) store locations. These assessments reflect the shopper's evaluation of the purchase solution variable which would best optimize her value for the shopping experience. Her perceived optimal shopper solution (intentions), reflects her beliefs mediated by her attitudes. This may result in the shopper assigning weight to the importance of products, brands, retailers, store locations, individually or in any combination, differently from her beliefs she held as a consumer.

The research model contains three moderators; social shopping situation, recipient, and occasion importance. These moderators can be described as:

Perceived Importance: represented by two elements, recipient, and occasion. In both cases, perceived importance relates to the shopper's assessment of how important these two elements are to her. Importance is seen as impacting the level of involvement in the shopping situation through the level of importance granted by the shopper.

Shopping Social Situation: the social norms which may be introduced by others into the environment of the shopper (Fishbein & Ajzen, 1980). For the purposes of this research, the shopping social situation has two variants. Self refers to the shopper undertaking the shopping trip alone. Not-supportive refers to the shopper engaging the shopping trip with another individual(s) who does not support the way the shopper behaves within the shopping environment, or does not support the products which are being purchased. The support context results in the shopper being either encouraged or discouraged in their original purchase pursuit.

Measures

The complexity of this model and the measurement of these multi-dimensional constructs required the adoption, adaptation and generation of a significant variety of measures. The existing operationalized measures were pulled from the literature as most representative of the constructs as they were conceptualized for this study. In addition to the existing operationalized scales, four new scales were conceptualized to complete this research. The complete description of the development of the scales to be operationalized in this particular research can be found in Appendix E. A recap of each of the measures used in this study, including reliabilities can be found in Appendix F. The two exogenous variables in the research model in combination reflect the need occasion construct from the shopper value framework (SVF).

To measure the consumer belief profile in the research model, measures of loyalty which would indicate the consumers predisposed orientation to a brand, product, retailer and store location, were reviewed. The most comprehensive exploration of loyalty which fit the context of the research was the multi-dimensional consumer-based brand equity scale (MBE) (Yoo & Donthu, 2001). This scale consists of fourteen scale items reflecting; loyalty, quality, awareness and overall equity, with reported overall reliability of 0.975 and reliabilities for sub-dimensions between 0.88 and 0.92. All scale items were

originally measured on a five point Likert type scale comprised of a variety of anchors specific to the product in question. For the purposes of this research, considering survey length and question complexity, all scales were modified to fit a seven point Likert format anchored by strongly disagree/strongly agree. This ensured greater ease in answering effort for the respondent (Dillman, 2007). While initially only for brand, the MBE scales were adapted here to represent each of the four categories (brand, product, retailer and store location) measured in the survey.

To measure occasion perception (OP), a series of scales comprised of both previously operationalized scales as well as proprietary scales created for this research were employed. The first sub-construct within OP product/service importance measures importance to the shopper, not the occasion. Her interest and involvement in the product or service to be provided help her frame a perception of the occasion. To assess this construct, the consumer involvement profile (CIP) was adapted to the context of this study (Kapferer & Laurent, 1993). The original consisted of 16 measures organized into dimensions representing interest, pleasure, sign, risk importance, and probability of error, with reliabilities ranging between 0.72 and 0.90. Some items were too specific and could not be adapted to the context of this study. All items were measured using a seven point Likert scale. The next set of sub-constructs to be measured in OP was the occasion and recipient importance to the shopper. These measures are oriented toward estimates of importance related to either the occasion or recipient. Therefore the scale used for the study required a dimensional orientation. As such, the personal involvement inventory (PII) was selected and is comprised of twenty word pairs on a seven point semantic

differential scale with reported reliability of 0.95 (Zaichkowsky, 1985). From the scale, only items which suited the orientation toward either an event or an individual were used, resulting in two distinct scales comprised of six items for occasion and eight items for recipient. The next sub-construct in OP to be measured was the sense of urgency with which the participant would view the occasion. Again, for the purposes of this study and in order to frame the occasion for the participant, urgency relates to her perception of the shopping urgency required for the occasion. For this measure, sense of time, with reported reliability of 0.84, was used (Rizkalla, 1989). The original scale which consisted of sixteen items was adapted to an eight item scale measured on a seven point Likert scale. The last sub-construct in OP was the setting assessment. This is a proprietary scale conceptualized for this study, and a review of its operationalization is in Appendix F. This scale is dimensionally oriented to capture the participant's perceptions toward the occasion which may help assess the occasion. It is comprised of fifteen word pairs measured on a seven point semantic differential scale.

The next construct in the model measures the shopper's purchase need assessment (SPNA), which represents shopper occasion perception from the SVF. This construct is multi-dimensional with sub-constructs representing the shopper's assessment of the product/service required for purchase, her motivation to purchase the product/service, her role in the occasion, and the subjective norms which are associated with the purchase of the product need. The first of the sub-constructs is product/service perception. While in the previous construct we measured shopper assessment of the product importance, this measures her assessment of the product and serves as an internal orientation toward the

product. This proprietary construct was conceptualized for the study and is comprised of ten word pairs measured on a seven point semantic differential scale. The results of the operationalization are in Appendix F. The second sub-construct within SPNA is motivation. This construct measures the shopper's motivation to complete the shopping which is required for the occasion. Therefore in the shopper model this motivation is situationally bound requiring a unique point of view in the assessment of motivation. The situational motivation scale (SIMS) examines motivation in four dimensions: amotivation, external and identified regulation, and intrinsic motivation (Guay, Vallerand, & Blanchard, 2000). Originally comprised of sixteen items, all are measured on a seven point Likert scale with reliabilities reported between 0.77 and 0.96. Adapted to the existing context, a reduced motivation scale utilizing eight items was devised. The next scale in SPNA is an assessment of the role the shopper perceives herself to play with regard to the product and the occasion. Originally comprised of twenty three items for organizational behavior research, the role scale represents the range of clarity with which the shopper may or may not have in approaching an occasion (Rizzo, House, & Lirtzman, 1970). All items were originally measured on a seven point Likert type scale with reported reliabilities of 0.81and 0.82. The final measure in SPNA relates to the subjective norms shoppers perceive relating to her purchase of the product or service need. This proprietary scale was conceptualized for this research. The results of the operationalization are also found in Appendix F. The scale consists of eight items measured on a seven point Likert scale that examines how the shopper perceives those who are important to them feel about purchasing the product need. The final construct in the research model is the shopper purchase solution assessment.

For the purposes of this research, the shopper purchase solution assessment (SPSA) represents the optimized orientation toward product, brand, retailer, and store location based on the participant's assessment of the occasion. This variable is designed to measure the unique way the shopper would solve the purchase need brought on by the occasion. Therefore, this measure not only represents how the shopper would target a solution, but also how value shifts from consumer belief due to the specification of an occasion. The multi-dimensional construct comprised of brand, product, retailer, and store location, required the development of a proprietary scale conceptualized to capture shopper assessment as represented in this study. The operationalization of the scale can be found in Appendix F. The scale for each of the sub-constructs consists of four items each measured on a seven point Likert scale. In combination, the above described measures serve to illustrate how the shopper moves from consumer belief to shopper intention. To further set the research in motion, a specific study context needs to be framed.

Study Context

Shoppers require a specific occasion with a specified purchase need to be fulfilled, in order to engage the SVF. In this case, the product need is specified as salty snacks. Salty snacks have a high repeat purchase rate and a strong brand affinity which combine to develop a robust consumer belief set (Brockett, et al., 1996; Kraak & Pelletier, 1998). Because of the strong belief set, it is assumed that any changes in purchase solution outcome which differ from the belief are a result of the shopper valuing different attributes which are better suited to the occasion which was specified (Lewis, 1946). Further, the context is specified through the introduction of eight different

scenario's which serve to define the occasion for the participant. Together, these context elements provide a foundation for measuring value change from consumer to shopper which offers valuable contribution for both brands and retailers.

Procedures

Participant sample and recruitment

Participants in pre-test one were recruited from retail degree granting programs from colleges across the United States. The sample contained students both undergraduate and graduate as well as faculty. The participants were directed to a website where they could take the survey. For some of the participants, extra credit was offered to take the survey, requiring an additional item requesting students to enter a code, which would keep them anonymous to the investigator, but known to the instructor granting credit.

The second pre-test and final surveys were conducted by a third party marketing research firm, who accessed a large nationally based consumer panel for participant recruitment. Participants were notified that a survey was available and were provided instructions for access. Both surveys were comprised of individuals who fit a specific profile. Due to the number of cells which needed to be filled approximately equally (Churchill & Iacobucci, 2002), it was necessary to use certain demographics inquiries as a pre-screen. Normally, these questions considered to be invasive by participants, are recommended to be inserted at the close of the survey (Dillman, 2007). Participants were screened for level of participation in grocery shopping, purchase regularity for salty snacks, age, gender, ethnicity, and geographic location. Participants who were qualified

but self-selected out of the survey during screening represented zero percent in the pre-test and (0.7%) in the final survey. Both percentages were well below commonly reported levels of insignificant non-response bias, indicating no significant impact on non-response bias from the early use of demographic questions (Denscombe, 2009). Participants who were qualified but self-selected out of the survey during the body of the survey represented 4.76% in the pre-test and 3.56% in the final survey. Again, indicating no significant impact of non-response bias (Denscombe, 2009). The goal of the pre-screen was to generate, as closely as possible, the key salty snack demographic within the U.S. for each of the manipulation cells, with particular attention to age, ethnicity, and income (Kuchler., Tegene, & Harris, 2004). Participants who completed the screening questions were then randomly assigned one of the eight scenarios. Each cell had a target of 65 members per cell, which was filled according to the participants' response to the screening questions. Cells obtaining the target number would close and therefore no longer be available for random assignment. Additionally, due to real time cell acceptance of the on-line environment, some cells were over populated thus increasing the total population of the sample.

Materials

All three surveys were conducted using an on-line platform. Participants having acknowledged the informed consent received a brief introduction to the research and then were asked to move on to a series of screening questions. Once completed, they were instructed to begin the initial pre-scenario section of the survey, which examined their beliefs related to the shopping for and purchase of salty snacks. The order for these questions were randomly presented to the participants to reduce the impact of order bias

and priming which could arise from a consistent presentation of retailer or brand (Dillman, 2007). With the initial consumer section completed, participants were directed to a scenario representing their cell assignment. These assignments were randomly presented based on the initial screening and cell availability (Dillman, 2007). Within each of the scenarios were imbedded messages which related to the experimental manipulations; social shopping situation, recipient and occasion importance. The scenarios divided into two main occasion types representing important or unimportant, which generated two base scenarios, which were then further manipulated as needed. The scenarios can be found in their entirety in Appendix D.

Once the participant had read the scenario, they were directed to complete the balance of the survey as most appropriate for the scenario they had read. Due to the complex nature of the experimental manipulations within the scenarios, participants were provided a link with each new screen of questions to access the scenario, should they require a review. When the participants had completed the main body of the survey, they were presented a series of manipulation checks to assess the effectiveness of each treatment. The participant was then instructed to answer questions regarding their purchase solution, and finally a series of additional demographic questions. The survey concluded with a thank you and a brief statement about its purpose and benefits.

Pre-test and manipulation check

Two pre-tests were conducted to assess the measures and the manipulations contained in the survey. The pre-tests allowed for the examination of new scales items and their relationship to corresponding constructs, and reliabilities of both proprietary and

previously operationalized scale items. Through the pre-tests, the experimental manipulations were checked for efficacy as well. Pre-test one examined a single scenario for significance, but was primarily focused on factor analysis, reliability measures and scale purification for the final survey.

Pre-test one was comprised of a sample of 57 college students both graduate and undergraduate as well as faculty members from across the U.S. The experimental condition manipulations in the pre-test were associated with cell one. Results of each of the manipulations indicate that the participants found the occasion and recipient unimportant and the shopping situation alone ($p > 0.000$), indicating that the participants found the scenario sufficiently distinct to identify the appropriate experimental condition. The constructs used in the research model were examined for reliability using Cronbach's alpha as a guide. Values for alpha in excess of the recommended cut-off ($\alpha > 0.700$) were sought which would indicate each scale reliably measures its intended construct (Churchill, 1979; Nunnally & Bernstein, 1994). A recap of the alpha scores for both pre-tests, and the scores for previously operationalized scales, where available, can be found in Table 17. While the cut-off was exceeded for all of the previously operationalized scales and most of the proprietary scales, the shopper purchase solution assessment (SPSA) scales failed to register sufficient reliability, with alphas ranging from 0.114 to 0.546. Therefore, the SPSA scales were reviewed for further refinement. Additionally, due to the length and complexity of the survey, scales were re-assessed through both exploratory factor analysis (EFA) and confirmatory factor analysis (CFA) to determine which of the items best measured the construct. This analysis was performed to identify

those items which could be removed from the scales and maintain validity and reliability, yet increase parsimony and reduce overall survey length (Nunnally & Bernstein, 1994). This scale purification method helped reduce the scale items for both the previously operationalized and proprietary scales to more manageable levels as seen in Table 16.

Table 16 *Cronbach's Alpha Pre-test Recap*

Cronbach's Alpha Constructs	**Original Scale**	**Pre-Test I**	**Pre-Test II**
Brand Loyalty	0.900	0.898	0.862
Product Loyalty	0.900	0.922	0.906
Retailer Loyalty	0.900	0.919	0.883
Location Loyalty	0.900	0.874	0.890
Product Importance	0.850	0.865	0.904
Occasion Importance		0.972	0.977
Product Perception		0.863	0.967
Consumer Importance		0.959	0.967
Occasion Urgency	0.840	0.833	0.886
Product Perception		0.863	0.944
Motivation	0.840	0.780	0.948
Role	0.820	0.884	0.892
Subjective Norms		0.931	0.925
Atmosphere Perception		0.844	0.949
Duration Perception		0.793	0.778
Location Perception		0.706	0.794
Occurrence Perception		0.828	0.841
Brand Assessment		0.546	0.841
Product Assessment		0.114	0.754
Retailer Assessment		0.529	0.816
Location Assessment		0.209	0.721

Acceptable value for Reliability Cronbach's Alpha > 0.700

Table 17 *Original Scale Items and Reduced Scale Items from Pre-test One*

Source	Scale	Factor	Original Scale Items	Survey Adjusted Scale Items
Yoo, B., & Donthu, N. (2001). Developing and validating a multidimensional consumer-based brand equity scale. Journal of Business Research, 52(1), 1-14.	**Multi-dimensional Brand Equity**	**Brand loyalty**	14	6
		Product loyalty	14	7
		Retailer loyalty	14	6
		Location loyalty	14	5
Zaichkowsky, J. L. (1985). Measuring the involvement construct. Journal of Consumer Research, 341-352.	**Personal Involvement Inventory**		20	5
Kapferer, J. N., & Laurent, G. (1993). Further evidence on the consumer involvement profile: five antecedents of involvement. Psychology and Marketing, 10(4), 347-355.	**Consumer Involvement Profile (CIP)**	**Product Import**	16	7
		Occasion Import	16	6
Rizkalla, A. N. (1989). Sense of Time Urgency and Consumer Well-Being: Testing Alternative Causal Models. Advances in Consumer Research, 16, 180-188.		**Occasion Urgency**	24	6
Operationalized	**Product Perception**		28	10
Guay, F., Vallerand, R. J., & Blanchard, C. (2000). On the assessment of situational intrinsic and extrinsic motivation: The Situational Motivation Scale (SIMS). Motivation and Emotion, 24(3), 175-213.	**The Situational Motivation Scale (SIMS)**	**Motivation**	17	8
Rizzo, J. R., House, R. J., & Lirtzman, S. I. (1970). Role conflict and ambiguity in complex organizations. Administrative science quarterly, 150-163.	**Organization Role**	**Role Ambiguity**	23	5
Operationalized	**Subjective Norms**	**Occasion Product**	8	8
Operationalized	**Occasion Perception**	**Setting Assessment**	31	15
		Atmosphere Perception	22	4
Operationalized	**Shopper Purchase Solution Assessment**	**Brand Importance**	3	4
		Product Importance	3	4
		Retailer Importance	3	4
		Location Importance	3	4

Pre-test two was comprised of a sample of 60 members of an on-line consumer panel which was generated through the use of a third party marketing research provider. In this pre-test, all of the experimental scenarios were tested to investigate the impact of the manipulation on a sample. Results indicate each of the manipulations adequately differentiated between the scenarios resulting in a Pearson chi-square test to register a significance of ($p > 0.000$), between all scenarios for all manipulations. The constructs used in the research model were again examined for reliability as they had been significantly trimmed or altered as a result of the first pre-test. This scale purification method helped reduce the scale items for both the pre-operationalized and the original scales to more manageable levels as seen in Table 17. Reliability was measured using Cronbach's alpha (please see Table 16). The results indicate that all scales now meet the minimum threshold for reliability with $\alpha > 0.700$ (Churchill, 1979; Nunnally & Bernstein, 1994).

Results

Descriptive Statistics

The pre-tests indicate the survey instrument had sufficient reliability and demonstrated adequate significance in the scenario manipulations. Therefore, the final study was undertaken. The final study targeted a population of 65 members per each of the eight experimental treatment cells. The final survey resulted in 542 respondents representing approximately 68 members per treatment cell. Members of the panel which participated in the pre-test were excluded from the final study. Each of the demographic categories was analyzed by cell using ANOVA revealing no significant difference. A

recap of the age and gender mix can be found in Table 18. The sample contained 282 female respondents (52%) and 260 male respondents (48%). The approximately even distribution by gender was intentional as men are heavy-loyal shoppers of salty snacks (Radio Advertising Bureau, 2002). The age range was specified between 18 and 45

Table 18 *Age and Gender by Experimental Treatment Cell*

Context				Quick Fill-in							
Shopping Social Situation				Self				w/other Not-			
Occasion Perception				Un-important		Important		Un-important		Important	
Recipient	Unimportant	Male		33		31		35		33	
		Female	1	38	3	33	5	36	7	34	
		Age		32		32		31		32	
	Important	Male		31		31		31		35	
		Female	2	36	4	35	6	34	8	36	
		Age		32		32		32		31	

which represents over 66% of the snack food purchasing age group (Radio Advertising Bureau, 2002). The sample demonstrated approximately the same buyer demographic which is 75% over the age of 25. Additionally, 53% report having no children, 65% report being employed (at least part time), and 49% report income of $50,000 or more, which also matches demographic trends (Radio Advertising Bureau, 2002). The unemployment rate is commensurate with the salty snack core shopper as many of the female shoppers are stay at home mothers which represented 70% of the unemployed in this sample and 43% of the female shoppers. A complete recap of the demographics can be found in Table 19. The reliability measurements including the trimmed scales returned

sufficiently high reliability as measured by Cronbach's alpha which can be found in Appendix E.

Preliminary Analysis and Measurement Model

The data were analyzed further using Amos 19 and confirmatory factor analysis (CFA), using the maximum likelihood estimation. Each individual construct was evaluated for fit and then evaluated for fit with its second order factor, prior to fitting a measurement model. (See Table 20) All first order factors as well as the second order factors demonstrated an acceptable fit to the data. The statistics used to asses fit were the

Table 19 *Final Survey Demographics*

Demographics	Gender	Age	Race	Income
Category	**Female**	**18-25**	**White (NH)**	**Below $20,000**
Quantity	282	130	417	77
Percentage	52.00%	25.00%	76.00%	14.00%
Category	**Male**	**26-35**	**Asian**	**$20,000 -$39,999**
Quantity	260	191	41	136
Percentage	48.00%	35.00%	8.00%	25.50%
Category		**36-45**	**African American**	**$40,000 -$69,999**
Quantity		221	37	271
Percentage		40.00%	7.00%	31.50%
Category			**Hispanic**	**$70,000 and Above**
Quantity			27	132
Percentage			5.00%	24.00%
Category			**All Other**	**No Response**
Quantity			20	26
Percentage			4.00%	5.00%

following indices: χ^2; χ^2/df ratio; comparative fit index (CFI); and root mean square error of approximation (RMSEA). The χ^2; χ^2/df ratio represent a global assessment of how

closely the specified model represents the fully saturated model (Byrne, 2010). CFI is an incremental fit index representing how far the fit model is from a perfectly fit model (Byrne, 2010). RMSEA is an absolute fit index representing how well the data fit the model (Byrne, 2010). Taken in combination these give a full perspective of model fit.

Table 20 *First Order and Second Order CFA*

Scale/Sub-Constructs	χ^2	*df*	*p*	χ^2/df	CFI	RMSEA
Consumer Belief Profile	858.428	236	0.000	3.637	0.940	0.070
Brand Loyalty	7.430	6	0.283	1.238	0.999	0.021
Product Loyalty	30.677	10	0.001	3.068	0.992	0.062
Retailer Loyalty	9.288	8	0.319	1.161	0.999	0.017
Location Loyalty	2.675	4	0.614	0.669	1.000	0.000
Occasion Perception	1727.755	714	0.000	2.420	0.955	0.051
Product Importance	13.281	5	0.021	2.656	0.996	0.055
Occasion Importance	13.584	6	0.350	2.264	0.998	0.048
Consumer Importance	34.632	11	0.000	3.148	0.996	0.063
Occasion Urgency	14.429	7	0.044	2.061	0.994	0.044
Setting Assessment	201.211	76	0.000	2.648	0.982	0.055
Shopper Need Perception	1052.558	416	0.000	2.530	0.963	0.053
Product/ Service Perception	71.598	30	0.000	2.387	0.991	0.051
Motivation	58.331	13	0.000	4.487	0.992	0.080
Role	4.559	5	0.472	0.912	1.000	0.000
Subjective Norms	25.566	12	0.012	2.131	0.996	0.046
Shopper Purchase Solution Assessment	509.212	77	0.000	6.613	0.947	0.102
Brand Importance	14.569	2	0.001	7.285	0.982	0.108
Product Importance	12.353	1	0.000	12.353	0.977	0.145
Retailer Importance	2.448	2	0.294	1.224	0.999	0.020
Location Importance	0.232	2	0.890	0.116	1.000	0.000

While other measures are available, their inclusion results in redundancy associated with the fit indices described. All of the first order factors as well as the second order factors fell within the normal ranges of acceptance, which are χ^2/df ratio ≤ 4; CFI ≥ 0.90; and

RMSEA ≤ 0.08 (Kline, 2010). Factor loadings were all above 0.50, which establishes adequate loading on each factor (Fornell & Larcker, 1981). The recap of the CFA fit statistics can be found in Table 20, and the individual factor loadings can be found in Table 21. The measurement model was then examined for fit with the following results: χ^2 (4315) = 8690.639, $p < 0.000$; χ^2/df ratio = 2.014; CFI = 0.917; and RMSEA = 0.043, which all fall within normal ranges of acceptance (Kline, 2010). The composite exploratory reliabilities ranged from 0.928 to 0.988, indicating adequate internal consistency (Nunnally & Bernstein, 1994). Each factor demonstrated an average variance extracted (AVE) greater than 0.50 (see Table 22) exceeding the level necessary to explain that the variance is greater than measurement error and establishing validity (Fornell & Larcker, 1981).

It has also been suggested that methods should be employed to help minimize common method variance (CMV), which is attributed to the method of measurement and not the measures which they are supposed to represent (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003). *A priori*, several methods were employed to address CMV which targeted two main effects. Item characteristic effects were addressed through simplified scales use, anchor variants between Likert and dimensional, and negatively worded items were excluded from analysis (Podsakoff, et al., 2003). Item context effects, were addressed through the use of neutral wording in items and direction, scale length variation, scale blocking, and the dependent variable placed at the end of the instrument (Harrison, McLaughlin, & Coalter, 1996; Podsakoff, et al., 2003; Salancik, 1984).

Table 21 *Factor Loadings*

Sub-Constructs	Measure	Factor Loading
Brand Belief Profile	I consider myself to be loyal to [Insert Brand]	.789
	[Insert Brand] would be my first choice	.843
	The likely quality of [Insert Brand] is extremely high	.839
	I can recognize [Insert Brand] among other competing brands	.836
	Some characteristics of [Insert Brand] come to my mind quickly	.823
	It makes sense to buy [Insert Brand] instead of any other brand, even if they are the same	.747
Product Belief Profile	I consider myself to be loyal to [Insert Brand,Product]	.800
	[Insert Brand,Product] would be my first choice	.855
	The likely quality of [Insert Brand,Product] is extremely high	.817
	I can recognize [Insert Brand,Product] among other competing products	.790
	It makes sense to buy [Insert Brand,Product] instead of other products, even if the others are the same	.837
	Even if another product has the same features as [Insert Brand,Product], I would still prefer to buy [Insert Brand,Product]	.882
	If another product is not different from [Insert Brand,Product] in any way, it seems smarter to purchase [Insert Brand,Product]	.823
Retailer Belief Profile	I consider myself to be loyal to [Insert Store]	.801
	I can recognize [Insert Store] among other competing stores	.841
	I am aware of [Insert Store]	.751
	Some characteristics of [Insert Store] come to my mind quickly	.813
	I can quickly recall the symbol or logo of [Insert Store]	.746
	Even if another retailer has the same features as [Insert Store], I still prefer to shop with[Insert Store]	.757
Store Location Belief Profile	I consider myself to be loyal to [Insert Store, Location]	.843
	It makes sense to shop at [Insert Store, Location] instead of another, even if they are the same	.873
	Even if another store location has the same features as [Insert Store, Location], I still prefer to shop at [Insert Store, Location]	.932
	If there is another store location as good as [Insert Store, Location], I still prefer to shop at [Insert Store, Location]	.859
	If another store location is not different from [Insert Store, Location] in any way, it seems smarter to shop at [Insert Store, Location]	.870
Product Importance	The salty snack I buy for [Insert Scenario] is extremely important to me	.843
	I am really very interested in the salty snack for [Insert Scenario]	.873
	I really enjoy buying the salty snack for [Insert Scenario]	.932
	[Insert Scenario] salty snacks are like giving a present	.859
	[Insert Scenario]salty snacks are a pleasure	.870

Table 21 *Continued*

Sub-Constructs	Measure	Factor Loading
Occasion Importance	Unimportant/Important	.928
	Not Relevant/Relevant	.909
	Does not matter to me/Matters to me	.924
	Not Essential/Essential	.930
	Not Needed/Needed	.919
	Not Necessary/Necessary	.930
Perceived Consumer Importance	Unimportant/Important	.928
	Boring/Intersting	.928
	Means Nothing/Means a Lot to Me	.936
	Unexciting/Exciting	.935
	Uninvolving/Involving	.921
	Mundane/Fascinating	.903
	Irrelevant/Relevant	.928
	Unappealing/Apealing	.931
Perceived Occasion Urgency	I often feel that time spent shopping for the product for [Insert Scenario] is NOT wasted time	.823
	I get almost panicky when I don't have enough time to shop for the product for [Insert Scenario]	.727
	It does not upset me when I have to postpone things I had already planned so I can shop for the product for [Insert Scenario]	.731
	I would NOT put aside my shopping for the product for [Insert Scenario] and relax even when I feel like it	.647
	I feel guilty if I'm relaxing instead of shopping for the product for [Insert Scenario]	.805
	I seem to be more interested in [Insert Scenario] than most of my friends	.812
Perceived Setting Assessment	Unpleasant/Pleasant	.926
	Strangers/Friends	.917
	Not Related/Related	.854
	Distant/Close	.923
	Not Comfortable/Comfortable	.941
	Unfamiliar/Familiar	.924
	Inappropriate/Appropriate	.883
	Drag On/Over Soon	.891
	Unpleasant/Pleasant	.571
	Exclusive/Open	.894
	Unfamiliar/Familiar	0.893
	Private/Public	.874
	Uncomfortable/Comfortable	.571
	Distant/Immediate	.874
	Later/Now	.894

Table 21 *Continued*

Sub-Constructs	Measure	Factor Loading
Product/ Service Assessment	Private/Public	.694
	Not Flavorful/	.868
	Shame/Proud	.826
	Hand Made/Mass Produced	.644
	Unfamiliar/Familiar	.885
	Unavailable/Available	.860
	Unpleasant/Pleasant	.877
	Unbranded/Branded	.816
	Unreliable/Reliable	.897
	Limited Choice/Abundant Choice	.795
Motivation	because I believe that [Insert Scenario] is an important occasion for me	.934
	of my own personal decision	.817
	because I think participating in [Insert Scenario] is good for me	.922
	because I am doing it for my own good	.837
	because I feel good about participating in [Insert Scenario]	.944
	because I think that [Insert Scenario] is interesting	.940
	because I think [Insert Scenario] is a pleasant occasion	.952
	because [Insert Scenario] is fun	.940
Role	I feel certain about how much authority I have to prepare for [Insert Scenario]	.883
	I have clear goals and plans for [Insert Scenario]	.901
	I know that I have divided my time properly for [Insert Scenario]	.886
	I know what my responsibilities for [Insert Scenario] are	.851
	I feel certain how I will be evaluated for [Insert Scenario]	.848
Shopping Trip Subjective Norms	I am concerned about what others who are important to me at [Insert Scenario] would think of the product(s) I purchase for this occasion	.815
	I want to purchase for [Insert Scenario] what others important to me think I should buy	.833
	Most people who are important to me think this product is important to [Insert Scenario]	.882
	Others who are important to me think I should do a good job selecting product for [Insert Scenario]	.795
	Most people who are important to me think that the brand of salty snack is important for [Insert Scenario]	.869
	Most people whose opinions I value think it is important to have the salty snack for [Insert Scenario] come from a specific retailer (store name)	.790
	Most people whose opinions I value think that the flavor of the salty snack is important for [Insert Scenario]	.840
	Most people whose opinions I value think it is important to have the salty snack for [Insert Scenario] come from a specific store location	.793

Table 21 *Continued*

Sub-Constructs	Measure	Factor Loading
Brand Assessment	that the product be from [Insert Brand]	0.769
	The BRAND of salty snack for the purchase required for [Insert Scenario] does NOT matter	0.328
	I will only purchase products from [Insert Brand]	0.779
	The Brand is the most important choice for the purchase required for [Insert Scenario]	0.823
Product Assessment	that the product be[Insert Brand, Product]	0.777
	The type of SALTY SNACK for the purchase required for [Insert Scenario] does NOT matter	0.242
	I will only purchase [Insert Brand, Product]	0.840
	The Product is the most important choice for the purchase required for [Insert Scenario]	0.536
Retailer Assessment	that the purchase come from any [Insert Store]	0.681
	The STORE where the purchase required for [Insert Scenario] comes from does NOT matter	0.407
	I will only purchase from [Insert Store]	0.735
	The Store is the most important choice for the purchase required for [Insert Scenario]	0.902
Location Assessment	that the purchase come from [Insert Store, Location]	0.821
	The specific store LOCATION for the purchase required for [Insert Scenario] does NOT matter	0.369
	I will only purchase at [Insert Store, Location]	0.738
	The Store Location is the most important choice for the purchase required for [Insert Scenario]	0.741

A marker variable could have been added for further testing, but was rejected due to overall survey length. Harman's one factor test (Podsakoff & Organ, 1986) revealed no single general factor being identified and 18 factors emerged with Eigen values above one. This indicates the likelihood that there was no significant influence of common method variance.

Structural Model and Hypothesis Testing

A structural model was used to test hypothesized relationships among constructs. Goodness-of-fit statistics indicated the overall acceptability of the structural model, χ^2 (5490) = 10982.799, $p < 0.000$; χ^2 /df ratio = 2.001; CFI = 0.909; and RMSEA = 0.043. The model illustrating the results of hypotheses testing using SEM can be found in Figure 18.

Hypothesis 1 is accepted, indicating a positive and significant relationship between the consumer belief profiles and shopper purchase need assessment (H_1, γ = 0.088, $p < 0.001$). The effect size for this relationship is small yet significant, which can be driven by the large sample size. Hypothesis 2 is accepted, indicating a positive and significant relationship between the consumer belief profiles and shopper purchase solution assessment (H_2, $\gamma = 0.236$, $p < 0.001$). Hypothesis 3 is accepted, indicating a positive and significant impact of occasion perception on shopper purchase need assessment (H_3, $\gamma = 0.941$, $p < 0.001$). Hypothesis 4 is also accepted indicating a positive

Table 22 *Average Variance Extracted*

Average Variance Extracted					
Factor	**Composite Reliability**	**1**	**2**	**3**	**4**
Consumer Belief Profile	0.975	0.786			
Occasion Perception	0.988	0.088	0.795		
Shopper Need Perception	0.986	0.786	0.941	0.840	
Shopper Purchase Solution Assessment	0.928	0.236	0.394	0.536	0.686

and significant relationship between shopper purchase need assessment and shopper purchase solution assessment (H_4, $\gamma = 0.394$, $p < 0.001$). The remaining hypotheses which

investigate the value change from consumer to shopper were examined using regression and ANOVA models demonstrating the impact of the experimental treatments. A review

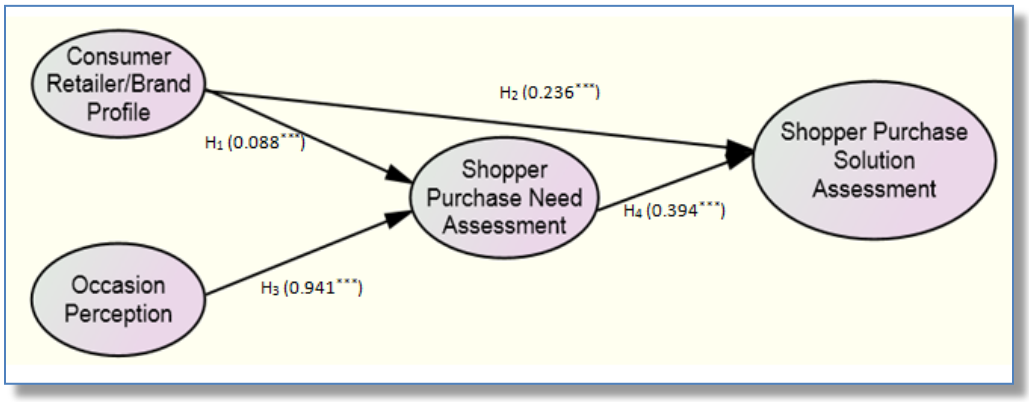


Figure 18. Research Model with SEM Hypothesis Results

of the hypotheses support can be found in Table 23. A complete review of the regression and ANOVA results can be found in Appendix H and I.

Table 23 *Hypothesis Review*

Hypothesis	Result	Std. Est.	CR.	*P*
H_1	Supported	0.088***	3.271	0.001
H_2	Supported	0.236***	4.985	0.001
H_3	Supported	0.941***	9.835	0.001
H_4	Supported	0.394***	7.247	0.001

	Regression t-Value					ANOVA t-Value				
	Brand	Product	Retailer	Store Location	Result	Brand	Product	Retailer	Store Location	Result
H_{5a}	1.776	1.425	1.608	1.777	Supported	2.017**	2.144**	1.511**	2.591**	Supported
H_{5b}	2.790	0.324	1.109	1.861	Supported	4.529**	4.676***	1.899**	2.714***	Supported
H_{5c}	3.612***	3.993***	3.975***	1.629	Partially Supported	2.830**	1.781	2.686**	2.647**	Partially Supported
H_{5d}	2.684**	2.006**	1.591	1.797	Partially Supported	1.445	3.906***	3.638***	2.576**	Partially Supported
H_{6a}	0.543	1.583	1.655	2.670	Supported	1.409	1.876	3.864***	3.398***	Partially Supported
H_{6b}	1.975	0.750	1.541	0.246	Supported	3.515**	2.947**	2.974***	2.903***	Supported
H_{6c}	3.919***	4.265***	2.321**	2.140**	Supported	2.919**	2.804**	1.915**	3.102***	Not Supported
H_{6d}	0.893	1.289	1.808	1.489	Supported	2.218**	1.392	1.927**	2.417**	Partially Supported

$^{**}p \leq 0.05$ $^{***}p \leq 0.001$

The following hypotheses, H_{5a} and $_{b}$, and H_{6b}, were all fully supported by the regressions and ANOVA's. Hypothesis 5_a, proposed that consumer retailer/brand profile (CRBP), the independent variable (IV), would **not** be a significant predictor of shopper purchase solution assessment (SPSA), the dependent variable (DV). Support for this hypothesis was demonstrated through multiple regressions for all sub-dimensions brand ($\beta = 2.266$, $p \geq 0.05$), product ($\beta = 1.874$, $p \geq 0.05$), retailer ($\beta = 2.987$, $p \geq 0.05$), and store location ($\beta = 1.473$, $p \geq 0.05$). Further it was hypothesized that due to the lack of significance found through the regressions, significant differences **would** exist between the paired sub-construct means between CRBP and SPSA (e.g., CRBP, brand and SPSA, brand). ANOVA's were used to examine for mean differences, and for scenario one (occasion and recipient are unimportant, and social shopping situation is alone) demonstrated significant differences between all sub-constructs, brand (CRBP $m = 5.91$, SPSA $m = 4.18$, $p \leq 0.05$), product (CRBP $m = 6.03$, SPSA $m = 4.22$, $p \leq 0.05$), retailer (CRBP $m = 6.14$, SPSA $m = 3.81$, $p \leq 0.05$), and location (CRBP $m = 5.64$, SPSA $m = 3.74$, $p \leq 0.05$). A review of the regression and ANOVA analyses can be found in Appendix I, Table 42.

Hypothesis 5_b, similarly proposed the IV would **not** be a significant predictor of the DV. Support for this hypothesis was demonstrated through regression for all sub-constructs brand ($\beta = 0.304$, $p \geq 0.05$), product ($\beta = 0.425$, $p \geq 0.05$), retailer ($\beta = 1.962$, $p \geq 0.05$), and store location ($\beta = 0.090$, $p \geq 0.05$). And as in the prior hypothesis, significant differences **would** exist between sub-construct means of CRBP and SPSA. The ANOVA's for scenario two (occasion is unimportant, recipient is important, and

social shopping situation is alone) demonstrate significant mean differences between all paired sub-constructs, brand (CRBP m = 6.12, SPSA m = 4.75, $p \leq 0.05$), product (CRBP m = 6.32, SPSA m = 4.90, $p \leq 0.05$), retailer (CRBP m = 6.15, SPSA m = 4.23, $p \leq 0.05$), and location (CRBP m = 5.81, SPSA m = 4.25, $p \leq 0.05$).

Hypothesis 6_b, similar to those proposed earlier, proposed the IV would **not** be a significant predictor of the DV. Support for this hypothesis was demonstrated through regression for all sub-constructs, brand (β = 2.343, $p \geq 0.05$), product (β = 1.151, $p \geq 0.05$), retailer (β = 2.555, $p \geq 0.05$), and store location (β = 0.248, $p \geq 0.05$). And as in the prior two hypotheses, significant differences **would** exist between sub-construct means of CRBP and SPSA. The ANOVA's for scenario six (occasion is unimportant, recipient is important, and social shopping situation is with another not-supportive) did indicate significant mean differences for all sub-constructs, brand (CRBP m = 6.07, SPSA m = 4.35, $p \leq 0.05$), product (CRBP m = 6.17, SPSA m = 4.51, $p \leq 0.05$), retailer (CRBP m = 6.20, SPSA m = 4.01, $p \leq 0.05$), and location (CRBP m = 5.77, SPSA m = 3.97, $p \leq 0.05$).

The next set of hypotheses, H_{6a} and $_d$, were both fully supported by the regressions but only partially supported by the ANOVA's. Hypothesis 6_a, proposed the IV would **not** be a significant predictor of the DV, which the regression supports for all sub-constructs brand (β = 0.75,1 $p \geq 0.05$), product (β = 2.102, $p \geq 0.05$), retailer (β = 1.973, $p \geq 0.05$), and store location (β = 1.598, $p \geq 0.05$). It was further proposed the lack of IV to DV significance **would** result significant differences between sub-construct means of CRBP and SPSA. The ANOVA's for scenario five (occasion and recipient are

unimportant, and social shopping situation is with another not-supportive) demonstrate partial support indicating as proposed, significant mean differences for retailer (CRBP m = 5.96, SPSA m =3.79, $p \leq 0.05$) and store location (CRBP m =*5.45*, SPSA m =3.80, $p \leq 0.05$), but no significant mean differences for product (CRBP m = 6.14 SPSA m = 4.15 $p \geq 0.05$) and brand (CRBP m = 6.03 SPSA m = 4.00 $p \geq 0.05$).

Hypothesis 6_d, proposed the IV would **not** be a significant predictor of the DV. Support for this hypothesis was demonstrated through regression for all sub-constructs, brand (β = 1.594, $p \geq 0.05$), product (β = 2.234, $p \geq 0.05$), retailer (β = 3.473, $p \geq 0.05$), and store location (β = 1.257, $p \geq 0.05$). And as in the prior hypothesis, significant differences **would** exist between sub-construct means of CRBP and SPSA. The ANOVA's for scenario eight (occasion/recipient; important, and with another; not-supportive) demonstrate partial support indicating significant mean differences for brand (CRBP m = 6.25, SPSA m = 4.73, $p \leq 0.05$), retailer (CRBP m = 6.27, SPSA m = 4.10, $p \leq 0.05$), and store location (CRBP m = 5.83, SPSA m = 4.10, $p \leq 0.05$), but not for product (CRBP m = 6.30, SPSA m = 4.89, $p \geq 0.05$).

This next hypothesis demonstrated support through the regressions but was not supported through the ANOVA's. Hypothesis 6_c, proposed the IV **would** be a significant predictor of the DV which was supported for all sub-constructs, brand (β = 3.871, $p \leq 0.05$), product (β = 3.968, $p \leq 0.05$), retailer (β = 2.754, $p \leq 0.05$), and store location (β = 1.536, $p \leq 0.05$). Sub-construct mean differences between CRBP and SPSA for scenario seven (occasion is important, recipient is unimportant, and social shopping situation is with another not-supportive) were proposed to be **not** significant, however, none of the

ANOVA's demonstrated support brand (CRBP $m = 5.99$, SPSA $m = 4.37$, $p \leq 0.05$), product (CRBP $m = 6.04$, SPSA $m = 4.56$, $p \leq 0.05$), retailer (CRBP $m = 6.23$, SPSA $m = 4.76$, $p \leq 0.05$), and store location (CRBP $m = 5.83$, SPSA $m = 3.69$, $p \leq 0.05$).

The final set of hypotheses H_{5c} and $_{d}$, demonstrated only partial support through both the regressions and the ANOVA's. Hypothesis 5_c, proposed that the IV **would** be a significant predictor of the DV which regression partially supported for brand ($\beta = 4.327$, $p \leq 0.05$), product ($\beta = 4.662$, $p \leq 0.05$), and retailer ($\beta = 5.032$, $p \leq 0.05$), however, the regressions failed to support the proposed relationship for store location ($\beta = 1.341$, $p \geq 0.05$). Sub-construct mean differences between CRBP and SPSA were proposed to be **not** significant and the ANOVA's indicate for scenario three (occasion is important, recipient is unimportant, and social shopping situation is alone) support only for the product dimension only (CRBP $m = 6.08$, SPSA $m = 4.71$, $p \geq 0.05$) with brand (CRBP $m = 6.08$, SPSA $m = 4.68$, $p \leq 0.05$), retailer (CRBP $m = 6.18$, SPSA $m = 4.15$, $p \leq 0.05$), and store locations (CRBP $m = 5.64$, SPSA $m = 4.09$, $p \leq 0.05$) all demonstrating significant mean differences.

Hypothesis 5_d, similarly proposed that the IV **would** be a significant predictor of the DV which regression partially supported for brand ($\beta = 2.717$, $p \leq 0.05$) and product ($\beta = 2.144$, $p \leq 0.05$) but, the regressions failed to support the proposed relationship for retailer ($\beta = 1.904$, $p \geq 0.05$), and store location ($\beta = 1.476$, $p \geq 0.05$). And as in the prior hypothesis, significant differences would **not** exist between sub-construct means of CRBP and SPSA. The ANOVA's indicate for scenario four (occasion and recipient are important, and social shopping situation is alone) support only for brand (CRBP $m = 6.04$

SPSA $m = 4.61$ $p \geq 0.05$), and no support for product (CRBP $m = 6.22$, SPSA $m = 4.75$, $p \leq 0.05$), retailer (CRBP $m = 6.18$, SPSA $m = 3.98$, $p \leq 0.05$), and store location (CRBP $m = 5.81$, SPSA $m = 3.80$, $p \leq 0.05$) as all demonstrated significant mean differences.

Discussion

At the outset of this study a shopper value framework (SVF) was presented as a theoretically driven approach to understanding how shoppers, different from consumers, may behave in the marketplace. While grounded in the theory of reasoned action, this shopper framework had yet to be empirically tested. Shoppers approach to shopping not merely as a means to an end, but as a means to a value optimized solution, has not been tested. Additionally, the dynamics within the shopper environment which may alter value for her has not been tested. The lack of empirical evidence demonstrating the differences between the shopper and the consumer and how she moves from need occasion to value serves as the impetus for this research.

The results of the study support the processes as proposed in the SVF. Shoppers, upon recognition of a specific need occasion, initially provide solution support through their consumer beliefs toward the brands, products, retailers and store locations which are most appropriate to the shopping solution. This finding corresponds to consumer's routine internal context construction (Adaval & Monroe, 2002). Shoppers, when faced with a new need occasion, will automatically provide a consumer belief foundation from their known experience even if the context or product in that experience is not in keeping with the current need. This behavior is virtually involuntary on the part of shoppers (Adaval & Monroe, 2002). This was evidenced by the significant relationship which was

found in hypothesis two between the consumer beliefs and the shoppers purchase need assessment. These beliefs which a consumer may have toward brands, products, retailers and store location/channel can be so strong as to be described as loyalty. In its most advanced form, loyalty would reflect a behavioral orientation, with the consumer displaying past loyalty and expressions of current and future intention to remain loyal (Wulf, et al., 2001). Beyond just the behavioral, consumers may develop relational engagements with brands, products, retailers and store location/channels which result in the desire to maintain interactions in that relationship regardless of how appropriate it may be for the occasion (Fournier, 1998). Through the significant relationship found between consumer beliefs and shopper purchase solution assessments, we can support that consumer beliefs can be strong enough to drive shoppers to maintain a certain consumer status quo, irrespective of the occasion. In the case of this research, participants were placed into situations where occasion and recipient importance were manipulated between important and unimportant, and social shopping situation was manipulated between alone or with another not-supportive. Regardless of these manipulations, shoppers demonstrated that consumer beliefs could be represented in their entirety, unchanged in the shopper purchase solution assessments. While the SVF supports the mediation in the model, it is important to note that shoppers can frame solutions in a manner which is fully consistent with their consumer beliefs. As the research model supported mediation, we can explore occasion context impact on shoppers.

The significant relationship found between the occasion perception and shopper purchase need assessment demonstrates the movement from an initial occasion

understanding to an appraisal of possible solutions. The occasion perception driven by five sub-constructs of which four relate to the occasion including, atmosphere, urgency, importance, and focal individual(s), with the remaining relating to product, demonstrates the level of specificity used by the shopper in framing solutions. This supports the idea that shoppers are motivated to act by the specifics of an occasion not a general notion of a product or service (Westbrook & Black, 1985). It can also be seen as supportive of the valuing schema which needs these specifics which the occasion provides, to evaluate attributes for value enhancement or depreciation (Flint, 2006; Lewis, 1946). This relationship in the model is enhanced through the demonstration that both consumer and occasion beliefs have a significant relationship with the shopper purchase need assessment.

The research model, representing the shopper value framework, demonstrates that initial need occasion recognition by the shopper which includes her consumer beliefs, forms the lens which the shopper uses in assessing benefits leading to her attitudes toward possible purchase solutions (Fishbein & Ajzen, 1975). The shopper considers a variety of issues related to the purchase, beyond just the product, as seen in the sub-constructs of shopper purchase need assessment. The shopper examines her attitudes toward her role, and motivation, toward the occasion and completing the purchase of the product need. Additionally, she considers her attitudes toward the product as well as the social norms related to the purchase of those product(s). This demonstrates the importance of occasion for the shopper and her framing outcomes based on the occasion (Westbrook & Black, 1985).

Finally, the shopper value framework proposes that shoppers will identify a target solution which represents their intentions toward fulfilling the purchase need required. These intentions also represent an evaluation of benefits which, for the shopper, represent the optimal value solution for the occasion (Flint, 2006; Flint, et al., 2002). The significant relationship between purchase need assessment and purchase solution assessment demonstrates the re-ordering of priorities made by the shopper from her consumer beliefs (brands, product, retailers and store locations/channel) and her purchase solution assessment as a function of her appraisal of the occasion (Belk, 1974; R. W. Belk, 1975). Furthermore, the social shopping factor manipulation also indicates that in addition to the occasion, factors relevant to the shopper at the time of purchase such as her social context also impact her decision process (Bearden & Etzel, 1982).

In an effort to further clarify the importance of the manipulation factors in the decision process, an additional set of ANOVA's were undertaken to examine the affect of the occasion and recipient importance and the social shopping situation. The complete review of these ANOVA's can be found in Tables 39and 41 in Appendix H. In all cases, when examining the mean values for brands, products, retailers and store locations from consumer belief to shopper intention, the difference was significant. This provides significant support for the impact that manipulation variables (occasion/recipient importance, and shopping social situation) have on shopper solution outcomes. They provide further support for the shopper value framework to represent the shopper's movement from need occasion recognition to solution generation. Further, the dynamic nature of shopping does fit within the structure of the framework, which can

accommodate changes in the shopper's environment and still generate satisfactory solutions. Therefore, while not directly testing shopper behavior, the research model demonstrates significant support for the shopper value framework, from need occasion to shopper value.

Within the framework, the mix of experimental treatments helps tease out the differences in relationships between consumer beliefs and shopper intentions. These manipulations were also designed to help demonstrate the priority of retailer, brand, product or location at various points in the generation of shopper purchase solutions. We find that as hypothesized in six of the eight experimental treatments (H_{5a} and $_b$, and 6_{a-d}) CRBP demonstrated no significant relationship with shopper intentions found in the SPSA. Of these six, three (H_{5a}, $_b$ and 6_b) were fully supported by the regressions and the ANOVA's. Experimental cell six (H_{6b}) (occasion is unimportant, recipient is important, and social shopping situation is with another not-supportive), the lack of significance in the regression and the significance found in the ANOVA's fully support the mediation in the model demonstrating no significant relationship between consumer beliefs and shopper purchase solution assessment. In the case of treatment cells one (H_{5a}) (occasion/recipient are unimportant, and social shopping situation is alone), and two (H_{5b}) (occasion is unimportant, recipient is important, and social shopping situation is alone), the similar lack of significance found in the regressions and combined with the significance found in all of the ANOVA's, would further indicate that the shopper, in certain conditions, frames entirely new outcomes different from the consumer beliefs. In experimental cells on and two, the mean differences are the lowest for retailers, while in

cell six it is the second lowest, which may indicate that shoppers focus on a retailer who can satisfy her needs, placing her confidence at the corporate level (retailer) and not at the branch level (store location) (Jolson & Spath, 1973). This is also an indication that in cases where the occasion is unimportant to the shopper, her preference for the retailer is more salient than the other attributes.

Two of the remaining cells which demonstrated support through regression (H_{6a} and $_{d}$) demonstrated only partial support through the ANOVA's. In both treatment cells, cell five (H_{6a}) (occasion/recipient are unimportant, and social shopping situation is with another not-supportive), and eight (H_{6d}) (occasion/recipient are important, and social shopping situation is with another not-supportive), the ANOVA's were proposed to demonstrate significant differences between the paired sub-constructs. In both cases, product failed to be significant and in the case of treatment cell five, brand also failed to be significant. In both cases the shopper is faced with a not-supportive. However, importance is reversed in each cell cancelling importance out. This outcome demonstrates support for reference group influence and the shopper seeking to manage the addition of risk she assumes due to the non-support added into her environment (Bearden & Etzel, 1982). Therefore, in the case of these hypotheses, the lack of support from a social shopping aspect may drive a desire to complete the shopping as quickly as possible which is driving the differences in retailer and store. However, the mixed result on brand and product may be due to shift in importance. In treatment cell five, which is unimportant neither brand nor product demonstrate differences indicating the use of the heuristic approach to the solution(Mittal, 1989). In treatment cell eight which is important, brand

has lost its salience from a consumer standpoint but the product has remained constant. The shopper may opt to flex on the "where" (retailer and location) and from "whom" (brand) components due to the un-supportive other. However, with the occasion and recipient both being of importance, she seeks comfort in the product. This may reflect the shoppers need to express her product involvement in this context (salty snacks) at the expense of brand loyalty (Quester & Lim, 2003). This may also again indicate the need to quickly complete the shopping due to the social circumstance yet, due to importance the focus is only on a single highly predictive product solution.

The final fully supported treatment cell through regression, cell seven (H_{6c}) (occasion is important, recipient is unimportant, and social shopping situation is with another not-supportive), failed to demonstrate any support by revealing significant differences between all paired sub-construct means for CRBP and SPSA, contrary to the hypothesis. This result would indicate that consumer beliefs, in this context, even with significant differences, can influence shopper outcomes. Treatment cell seven has an important occasion, and an unimportant recipient along with an un-supportive social shopping situation. The combination of the mixed importance and the un-supportive other may place the shopper in a situation where she will need to compromise on a variety of fronts. As such she may heavily rely on her consumer heuristics, employing peripheral decision making as she attempts to manage the social environment toward a positive outcome (Petty, et al., 1983).

The remaining two treatment cells (H_{5c} and $_{d}$) demonstrated only partial support for both the regressions and the ANOVA's. Treatment cell three (H_{5c}) (occasion is

important, recipient is unimportant, and social shopping situation is with another not-supportive), the hypothesized significant relationship between consumer beliefs and shopper solution was only partially accepted. The regressions failed to demonstrate a significant relationship with location. This may largely be a result of the specified shopping context (quick fill-in) which may not lend itself to location support, as convenience may take precedence. Furthermore, shoppers may prefer certain retailers, yet select only certain locations of that retailer, at which to shop. Those preferred locations may not however, be the most convenient (Jolson & Spath, 1973). Additionally, there is no significant difference in means as proposed, only for the paired sub-constructs for products. In this case, lack of recipient importance and shopper product involvement may press the shopper toward the same solution as in experimental cell eight (H_{6d}).

Finally, treatment cell 4 (H_{5d}) (occasion/recipient are important, and social shopping situation is with another not-supportive), also showed only partial support for the hypothesized significant relationship between consumer belief and shopper solution. In this case it is supported only for brand and product. The ANOVA's were proposed to demonstrate a lack of significance, indicated that the mean differences for the paired sub-constructs is supported for brand only. This would indicate that in high risk situations, the shopper relies on the item needed including and to a lesser extent its brand, at the expense of both retailer and store location. This is of course provided that the product is not from a single brand store, which in this context it would not be. Therefore we clearly see the interplay of decision making and risk management combined with involvement driving the shoppers decision in this treatment (Mittal, 1989; Quester & Lim, 2003).

The results of this research indicate that the six supported relationships and the two partially supported relationships represent strong evidence of the differences between consumers and shoppers. The positive relationship supported in hypothesis three (H_3) between CRBP and SPSA indicates that consumer loyalty in limited cases can translate into shopper solutions. This would appear to be further supported through the regression and ANOVA results for the conditions found in treatment cell seven (H_{6c}). These results also demonstrate the usefulness of the shopper value framework for investigating shoppers. Through that examination, the indication is that there are points of inflection where brand, product, retailer and/or store location can take precedence during the shopping experience.

Future Research and Limitations

This research is exploratory and provides only the beginning of the research necessary to understand the shopper. While there are many identified shopping contexts (e.g., convenience, self-gratification, stock-up, etc.) this study examined one, quick fill-in. One goal of this study was to identify if and where products, brands, retailers and store locations may have more influence with a shopper. As a result of the shopping context limitation, this research can only address any understanding from a single context point of view. The shopping social situation only measured two forms; alone and with another not-supportive. There are of course a myriad of different social situations (e.g., parent/child, group, sibling, supportive) to name a few which would all have implications for the shopper outcome. Our understanding of the shopper would benefit from the examination of all social shopping situations. Additionally, this study examined only one product category, salty snacks. While for the purposes of this research this is an important

category to study for the reasons already explained, it can be assumed that regardless of category, the shopper will move through the framework in a similar manner. However, it cannot be assumed that the implications for retailers, brands, products, and store locations will remain constant. Based on the varying scenarios and the type of involvement generated with a shopper, the brand, product, store location and retailer implications could all vary. This would further support product categories as an area for future research.

This study, while generating a nationwide sample, cannot propose to be representative of the population thus reducing its generalizability. The demographics were capped to match category target markets, but leave off valuable constituencies both above and below the cut-offs. A cursory review of the ethnic diversity in the sample would reinforce the limitations with on-line surveys as well as indicate that perhaps these results may differ within more highly sampled sub-groups.

Contributions

This study provides valuable contributions to the literature and the understanding of the shopper. The proposed shopper value framework was empirically examined through the use of an on-line survey methodology utilizing an experimental design. With the exception of the experiencing construct, the framework appears to function with the relationships as proposed. Through the process of measuring the relationships several new scales were developed which allowed for the empirical measurement of proposed constructs. Together, the framework provides a vehicle through which it is possible to examine a shopper on her path to purchase. Further, it also provides a platform to

measure the impact of change in the shopper environment, and how she optimized value in her solutions as a result of those changes.

The shopper value framework pointed to attribute salience which in the model was represented by the various scenarios employed. It is possible for marketers and retailers to examine not a segment of the shoppers but all shoppers from a situational standpoint to assist in the co-creation of value. Through this examination, programs can be developed to target specific products, or brands, through specific retailers, or store locations, to best satisfy shoppers who are similarly situated.

This study also indicates the need to understand shopper motivation as opposed to consumer beliefs. In limited circumstances as demonstrated, consumer beliefs can be the driving force for the solution, however, in only one of the scenarios examined, did the consumer hold influence as hypothesized. Shoppers can be seen through this research to generate solutions which are specific to an occasion which may have no significant relationship to the consumers' beliefs.

This study provides a window into the shopper's path to purchase through the lens of value optimization. This research adds a valuable framework into the literature to help understand the processes the shopper engages in her solution pursuit. Using a long established theoretical foundation, theory of reasoned action, the shopper framework has been rigorously tested and found to function as proposed. While this is a promising beginning, it is just the beginning, and will require a substantial amount of research to begin to understand the shopper.

CHAPTER 5 – CONVERGENCE OF FINDINGS

Summary of Qualitative Findings

The qualitative research using value laddering, with a particular focus on salty snacks, produced a variety of shopper orientations toward the purchase of products. These various orientations represented what the shopper valued as a guiding directional influence in her purchase solution.

As we examine what the shoppers valued, six primary value orientations emerge, community, family, health, independence, nurture, and security (alphabetical order). These primary value orientations are supported by thirteen secondary value orientations, bonding, frugality, home, inclusion, job, knowledge, memories, others, reciprocity, role, scare resources, treatment, trust (alphabetical order). These value orientations have been shown to be specifically relevant for shoppers. However, value orientations are not unique to shoppers. The consumer literature has many conceptualizations, of which two have tended to dominate; values and lifestyle (VALS) and list of values (LOV) (Kahle, 1983; Strategic Business Insights, 2012). VALS represents a consumer typology based on value orientations which is hierarchical read from bottom to top, worse to better, as seen in Figure 21 (Kahle, Beatty, & Homer, 1986; Strategic Business Insights, 2012). From the positioning of this research, static typologies tend to be of less value as it concerns the shopper.

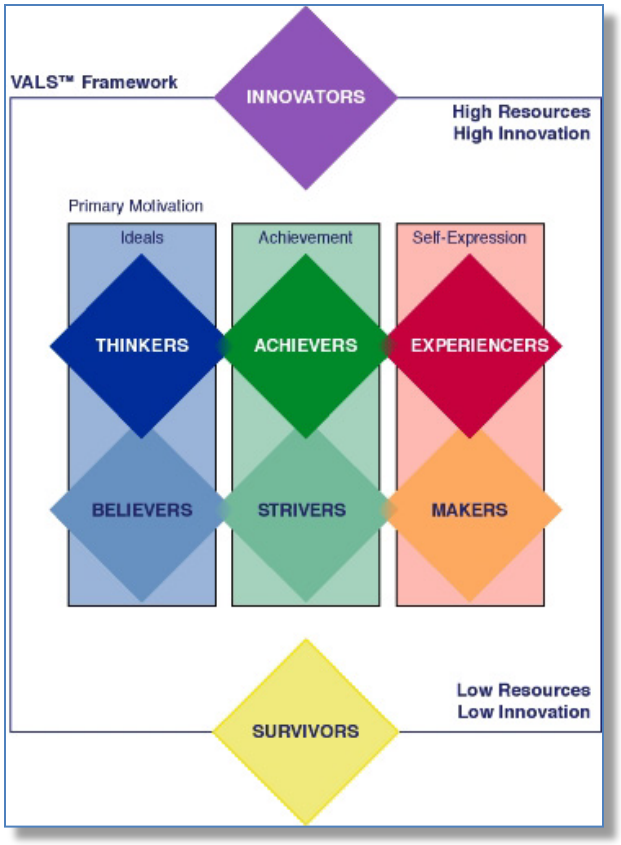


Figure 19. Values and lifestyle (VALS) typology. Reprinted from *Strategic Business Insights. (2012). About VALS,* 2012, from http://strategicbusinessinsights.com/vals/about.shtml

A more dynamic approach to value, which may be more appropriate for shoppers, we turn again to the LOV which was described in detail in chapter two. The LOV examines what an individual values from a situational perspective. The malleable nature of the LOV to situation helps to add clarity to the understanding of the shopper.

Taken together, these concepts along with the shopper values identified in the qualitative research provide support for a values of shoppers (VOS) framework. The VOS provides a comprehensive view of how the primary and secondary shopper values

work together to frame solution orientations for shoppers. The VOS leverages the influence of the secondary values toward the six primary values, which consistently underpin shopper behavior. This can be further examined through the findings of the quantitative study.

Summary of Quantitative Findings

The quantitative study helped to establish the relationship between the shopper, her purchase need and the brand(s), product(s), retailer(s), store location(s), and/or channel(s) which may best optimize her value for the particular occasion. Through the framework, the shopper moves from the need occasion, to occasion perception, to targeting and experiencing, which ultimately determines the value the shopper assesses for the entire shopping experience.

One element of the study was to clarify that shoppers are different from consumers. As a result of this difference a shopper may value brands, products, retailers, store locations and/or channels in a manner which is not consistent with their consumer point of view. The results of the study indicate that this difference is the case for most, but not all circumstances. The study adds clarity to the role situation plays as a determinant in how a shopper approaches her purchase need when framing her shopping experience. The situational framing results in valuing different attributes or valuing the same attributes differently which in both cases can lead to disparities between consumer and shopper value.

The shopper, as described in this research, tends to follow a hierarchical model in her approach to establishing a purchase solution. This hierarchy is represented in the shopper value framework (SVF). The shopper brings with her a consumer pre-disposition toward products, brands, retailers, store locations, and/or channel when considering purchase solutions. However, through her understanding of the occasion which predicates the purchase need, she develops varying value weights for attributes associated with the occasion and the product. As a result of her situationally based assessment of attribute benefit, she begins to define purchase solution which will result in her optimizing value from her shopping experience.

The SVF and its hierarchical approach to a shopper purchase solution through value attribution is a significant finding related to the shopper literature. Additionally, the identification of shopper specific values contributes clarity toward the understanding of the role values play in the assessment of attribute benefit. However, in order to fully appreciate these contributions, it is necessary to examine how they work together.

Motivation and Its Impact on the Shopper

Central to all elements of the shopper paradigm is motivation. Motivation can come in three forms; intrinsic, extrinsic and amotivation (Deci & Ryan, 1991). In addition to these elements it has been proposed that motivation is also hierarchical (Vallerand, 1997). Ultimately, through either intrinsic or extrinsic motivation, the shopper will obtain a solution and some level of value from her shopping experience. Amotivation alternatively leads at best, to sub-optimization and at worst, a shopper who fails to achieve any solution. A representation of this hierarchy can be found in Figure 20.

The figure represents three levels which are of particular importance for the shopper value paradigm - global, contextual, and situational. The following will explore these in depth in relation to shoppers and value.

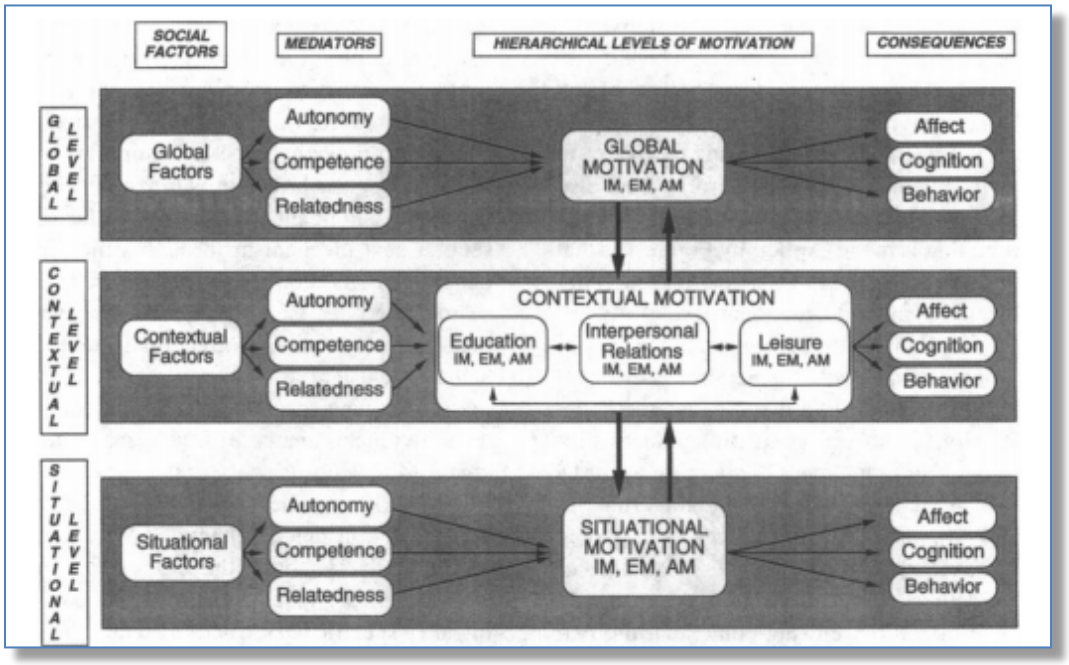


Figure 20. The Hierarchical Model of Intrinsic and Extrinsic Motivation. From *Toward a Hierarchical Model of Intrinsic and Extrinsic Motivation*, by R. J. Vallerand, 1995, June. A theory/review paper presented at the Canadian Psychology Association Annual Meeting.

Social Factors

Social factors represent the levels of the motivational hierarchy, and are as can be seen in the figure, from the top, global, contextual, and situational (Vallerand, 1997). As described, global represents the general orientation of the individual toward action through either intrinsic, extrinsic, or amotivation (Vallerand, 1997).

From the standpoint of the SVF the global level is represented by the consumer beliefs which the shopper brings into every situation. The consumer beliefs which have

been developed over time are somewhat more stable and enduring. However, as we have seen in the quantitative research, they are often supplanted by the more immediate needs brought on by a specific occasion. As such we find that global level measures are reflective of the need occasion construct in the SVF which the quantitative study examined for both consumer beliefs and beliefs about the occasion and product. Further, the global level also represents the most enduring of the motivational orientations (Vallerand, 1997). This adds support for leveraging the VALS structure as a model for this activity. However, unlike VALS, this model represents values which are active not static segments. As we examine the VOS, these more global orientations reflect the six primary values (community, family, health, independence, nurture, and security) from the laddering study which are more consistently engaged in by the shopper.

These primary values can be seen to comprise two main groupings; condition and orientation. From this perspective the condition values are represented by four primary values; health, family, security, and community. These reflect the shoppers valuing toward certain conditions of importance. These values function in the VOS similar to the classifications identified in LOV (Kahle, 1983). The orientation values are represented by independence and nurture. These values represent an individual pre-disposition toward how they approach shopping. Values are dimensional constructs so no individual is completely oriented in one direction or the other (Fritzsche & Oz, 2007). These values represent a predisposition which, as we have seen with consumers, does not necessarily indicate a permanent orientation. These values are also reflective of the directionality described in LOV, which represented either an inner or outward orientation (Kahle, 1983;

Kahle, et al., 1986). Working in conjunction with the VALS model, a certain stability and schematic representation can take form representing the relationships of these values at the global level which can be seen in Figure 21.

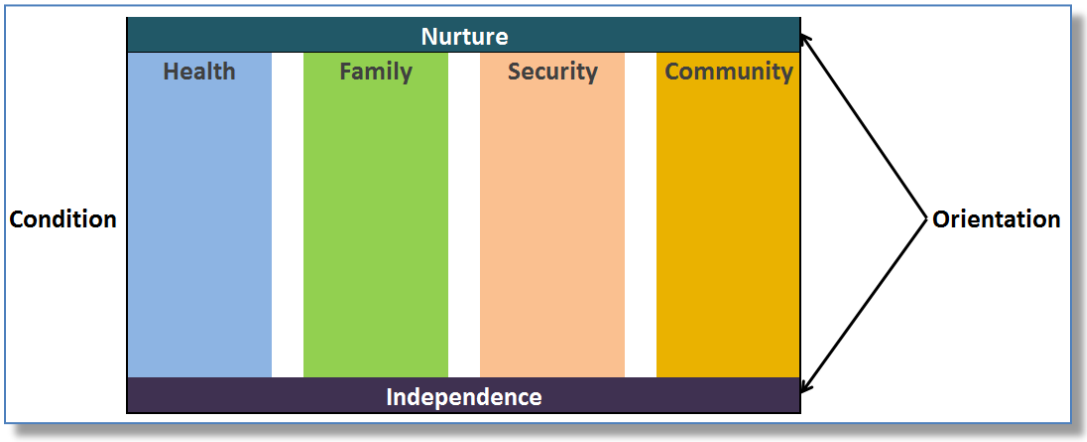


Figure 21. Global Level: Values of Shoppers (VOS)

Contextual Level

The contextual level represents the social contexts in which individuals engage either an activity or others (Vallerand, 1997). From both the LOV and VALS perspective, this represents the distinction which is inherent in the individual (Kahle, et al., 1986). For the shopper, the contextual level represents both the interpersonal and the activity which are both bound to the social context. As the shopper examines the need occasion she begins to identify the constraints associated with the occasion and begins to frame her perception of the need occasion. These begin to alter how she will value attribute benefits which will help in the determination of her targeted solution. At the contextual level the shopper is engaging her orientation as she has not fully formed her perception of the occasion.

The secondary shopper values associated with orientation are; reciprocity, inclusion, knowledge, frugality, treatment, and others. These values, based on the interactions seen in the qualitative research, can be grouped by their relationships such that the first three (reciprocity, inclusion, and knowledge) are associated with nurture, while the remaining three (frugality, treatment, and others) are associated with independence. The VOS with these factors in place can be seen in Figure 22.

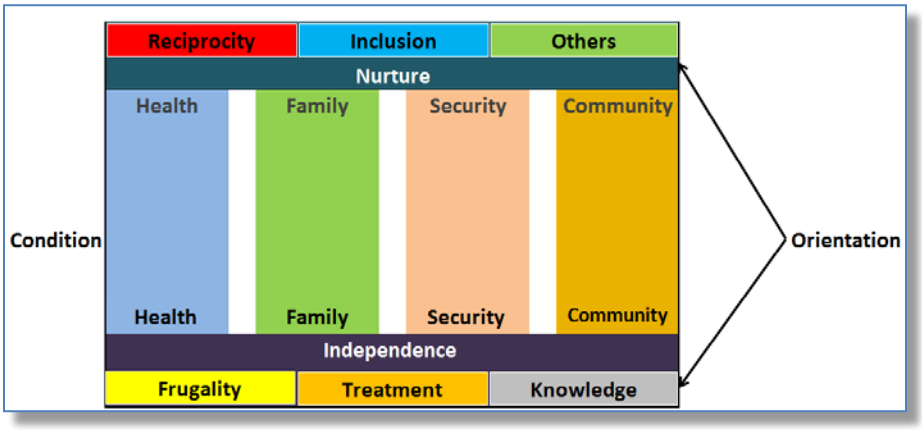


Figure 22. Contextual Level: VOS

Situational Level

The situational level of the hierarchy refers to the specifics which drive a particular activity (Vallerand, 1997). From the LOV perspective these are the changing roles which alter an individual's values (Kahle, 1983). From the SVF perspective the situational level represents the shopper occasion perception which ties together the specifics for the shopper. From the operationalization of this construct in the quantitative study the shopper now is also examining her role, recognition of her motivation toward a need solution, her perception of the product or service needed and the situational subjective norms associated with the purchase of the identified need.

Once again returning to the values which emerged from the shopper interview data, the secondary values which are associated with the situational level (role, home bonding, scarce resources, memories, trust, and job) can be seen to impact how the shopper, based on her orientation, will reflect her core condition values given the specifics of the occasion. Furthermore, the situational level values have established relationships with the condition values as seen in the values relationship chart (See Chapter Two, Table 15). Therefore, based on the influence that role, home, bonding, scarce resources, memories, trust, and job, have on their associated condition values, the shopper will value differing outcomes. In order to better illustrate these relationships, the VOS framework with all values represented can be seen in Figure 23. (Note: This framework is a two dimensional representation. If presented in a cylindrical manner, it would be easier to identify the contiguous nature of the value; job.)

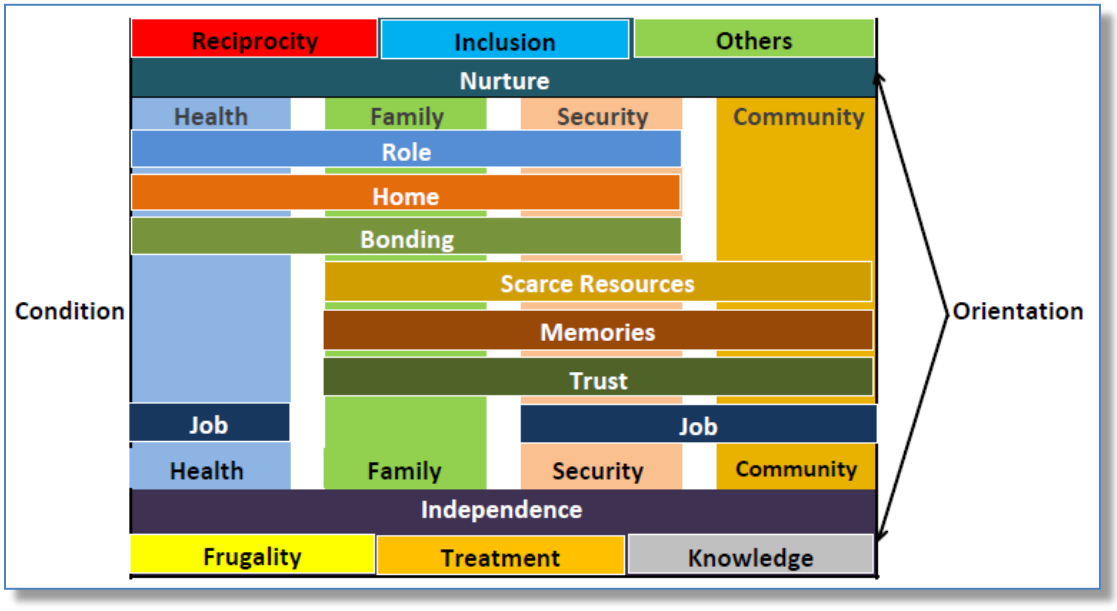


Figure 23. Values of Shoppers (VOS)

Through the VOS framework we can see how the shopper, during occasion perception and targeting, leverages her values and her values orientations to help assess attribute benefit. Leveraging these against her potential purchase solutions, the shopper can identify which attribute benefits will result in optimizing her values. Additionally, while these values may represent her consumer orientation as well, it is the specificity of the shopping occasion which will drive the shoppers mix and weighting of these values in a manner which will most likely differ from the consumer. The VOS represents the values identified by shoppers, who within the SVF, leverage values toward her development of purchase solutions, from which she will derive shopper value.

Concluding Remarks

This research has examined shoppers through the literature, face to face and on-line. A framework for understanding the shopper's process from need occasion to value assessment, was at the foundation of this research. Examining how shoppers leverage information in a dynamic environment in order to optimize their value has until now been little understood and little researched.

This dissertation through its exploratory approach has begun to offer some insights toward how to better understand the shopper. Through the empirical support of the hierarchical approach to shopping represented by the shopper value framework, future research can be undertaken to better understand how the shopper progresses and regresses through the model on her way to value. Through the values of shoppers, support can be given to the understanding of the dynamism which the shopper leverages toward value optimization. Similar to some existing values conceptualizations (Rokeach, 1973), values

of shoppers are employed hierarchically. Similar to some other value conceptualizations, values of shoppers are subject to change from environmental or social influence (Kahle, 1983). However, different from these conceptualizations, the shopper uses these values as a method for shaping her optimum value solution based on the specifics of each occasion she encounters.

Finally, shopper value has been described, defined, and demonstrated to be unique from consumer value. A method for examining how to measure shopper value has been demonstrated. Through that demonstration, area's which would be beneficial to both brand marketers and retailers to target value laden messages toward co-creating value with shoppers was also identified. This exploration has identified and demonstrated the significant differences between shoppers and consumers. This research identifies several areas which are important to shoppers, retailers and marketers, which all require much more research in order to better serve the shopper, and through that service, improve performance for retailers and brands.

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APPENDICES

Appendix A

Study Information and Preliminary Interview Guide

STUDY INFORMATION SHEET

On behalf of the University of Tennessee, thank you for taking the time to participate in this research. The purpose of this study is to better understand consumers of consumer package goods purchasing behavior.

You will be asked to respond to a series of interview questions on your values, attitudes and behavior related to purchasing consumer package goods and brands. This interview will take approximately 15 - 45 minutes of your time. The interview will be digitally recorded and the results transcribed. No mention of your name or other identifying characteristics will be recorded. The digital copy will be destroyed following transcription. The findings of this research will help in providing an improved understanding of consumer package goods purchasing behavior for you.

Your participation in this study is voluntary; you may decline to participate without penalty. If you decide to participate, you may withdraw from the study at anytime without penalty and without loss of benefits to which you are otherwise entitled. The information in the study records will be kept confidential. Data will be stored securely and will be made available only to persons conducting the study unless you specifically give permission in writing to do otherwise. No reference will be made in oral or written reports which could link you to the study.

If you have questions at any time about the study or the procedures, you may contact the researcher, Dr. Ann Fairhurst, at 246 JHB, or 865-974-6609. If you have any questions about your rights as a participant, contact the Research Compliance Services section of the Office of Research at (865) 974-3466.

Robert Jones	Dr. Ann Fairhurst
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Retail and Consumer Sciences	Retail and Consumer Sciences
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Interview Questions

1) Do purchase consumer package goods?
2) Where do you purchase your consumer package goods?
3) What is your favorite brand or retailer of consumer package goods?
4) What about this brand or retailer do you prefer?
5) What is your most expensive consumer package goods purchase?
6) What brand was it?
7) Least expensive consumer package goods purchase?
8) What brand was it?
9) Is there any type of consumer package goods you do not like? Favorite?
10) Do you know other people that purchase consumer package goods?
11) Do you know people that purchase consumer package goods similar to your choices of consumer package goods?
12) Do you know where those people purchase their consumer package goods?
13) Do those people know where you purchase your consumer package goods?
14) How do you know where those people purchase their consumer package goods?
15) How do those people know where you purchase your consumer package goods?
16) How important are consumer package goods to you?
17) When did you start purchasing consumer package goods?
18) Has one brand been important throughout?
19) Do you enjoy purchasing consumer package goods?
20) What about purchasing consumer package goods do you enjoy?
21) Tell me about that brand and what makes it special?
22) Has your purchasing of consumer package goods changed recently? Why?

Informed Consent Form

INFORMED CONSENT STATEMENT

Consumer package goods Values, Attitudes and Behavior Study

INTRODUCTION

On behalf of the University of Tennessee, thank you for taking the time to participate in this research. The purpose of this study is to better understand consumer values, attitudes and behavior related to purchasing consumer package goods and brands.

INFORMATION ABOUT PARTICIPANTS' INVOLVEMENT IN THE STUDY

Your participation will be to respond to a series of interview questions related to:

- Your values, attitudes and behavior related to consumer package goods and brands

Your participation will involve one interview. The interview will take approximately 5 - 15 minutes of your time.

The interview will be digitally recorded and the results transcribed. No mention of your name or other identifying characteristics will be recorded. The digital copy will be destroyed following transcription.

RISKS

There are no anticipated to you for participating in this study. Questions are of a general shopping and consumption behavior. No information will be gathered which in part or in combination can be used to determine the identity of any participant in the study.

BENEFITS

The research will develop a further understanding of how consumers behave in a particular retail segment which is consumer package goods purchasing. This information is important to retailers and other consumers including you in understanding what impact brands play in consumer package goods buying.

CONFIDENTIALITY

The information in the study records will be kept confidential. Data will be stored securely and will be made available only to persons conducting the study unless you specifically give permission in writing to do otherwise. No reference will be made in oral or written reports which could link you to the study.

_____ Participant's initials (place on the bottom front page of two-sided consent forms)

CONTACT INFORMATION

If you have questions at any time about the study or the procedures, you may contact the researcher, Dr. Heejin Lim, at 203B JHB, or 865-974-6296. If you have any questions about your rights as a participant, contact the Research Compliance Services section of the Office of Research at (865) 974-3466.

Robert Jones	**Dr. Ann Fairhurst**
Ph.D. Student	**Professor**
Retail and Consumer Sciences	**Retail and Consumer Sciences**
233B JHB	**246 JHB**
(865) 974-1848	**(865) 974-6609**

PARTICIPATION

Your participation in this study is voluntary; you may decline to participate without penalty. If you decide to participate, you may withdraw from the study at anytime without penalty and without loss of benefits to which you are otherwise entitled. If you withdraw from the study before data collection is completed your data will be returned to you or destroyed.

CONSENT

I have read the above information. I have received a copy of this form. I agree to participate in this study.

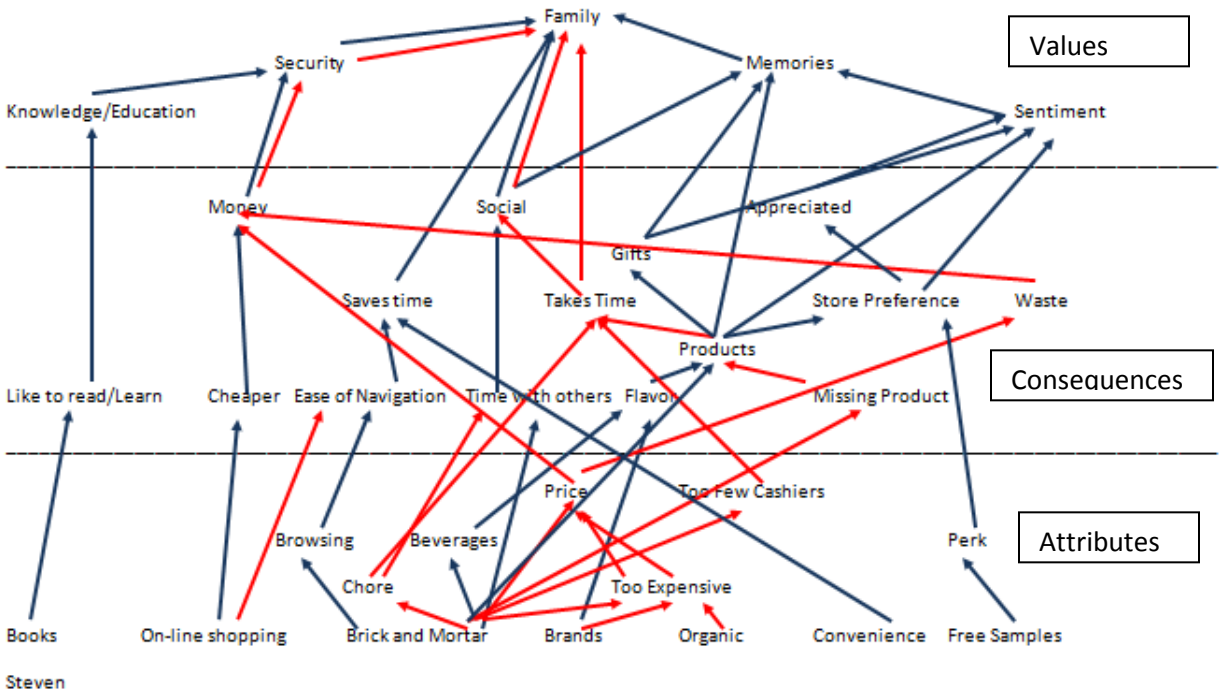
Participant's signature _____ Date _____

Investigator's signature _____ Date _____

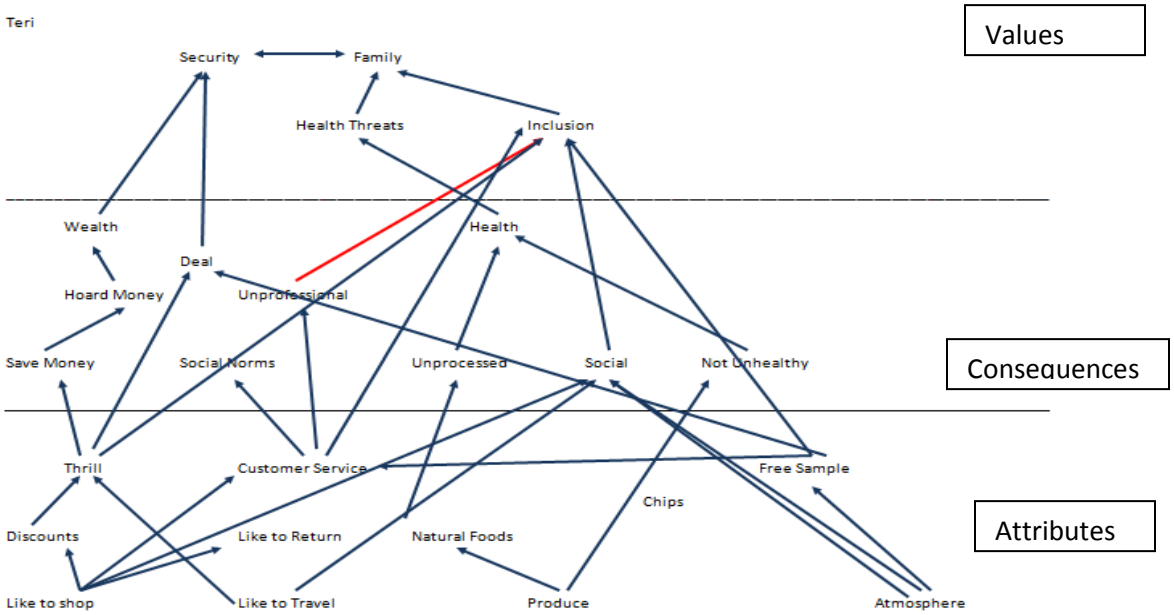
Appendix B

Interview Ladders

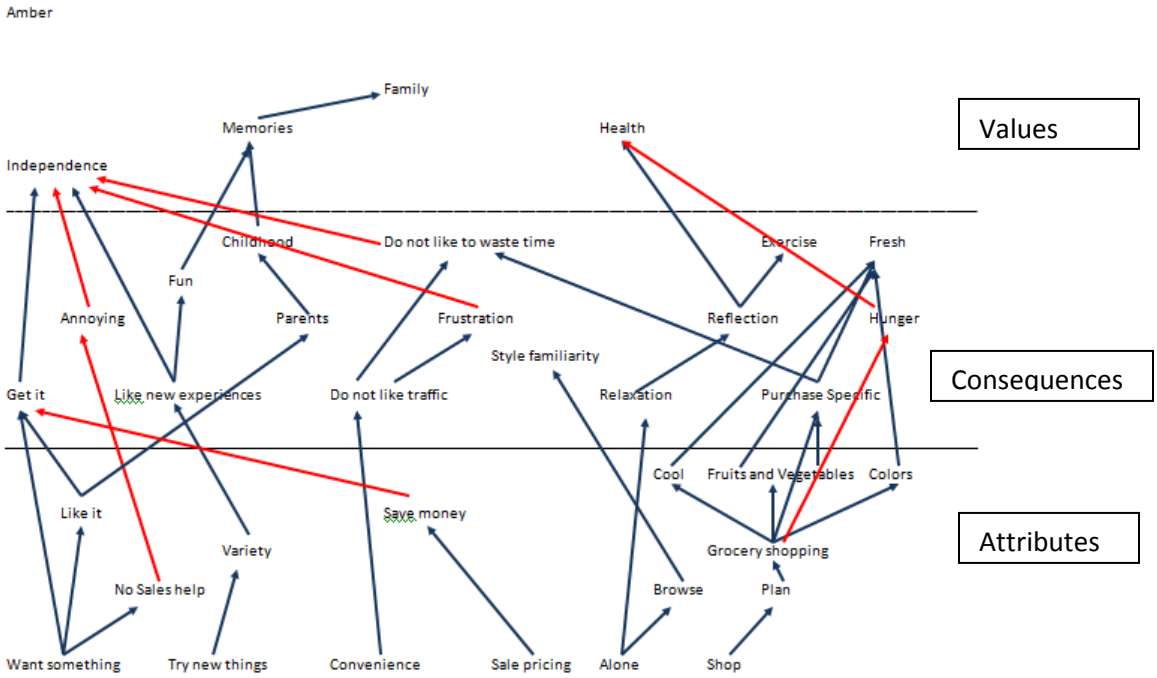
Ladder I – Steven



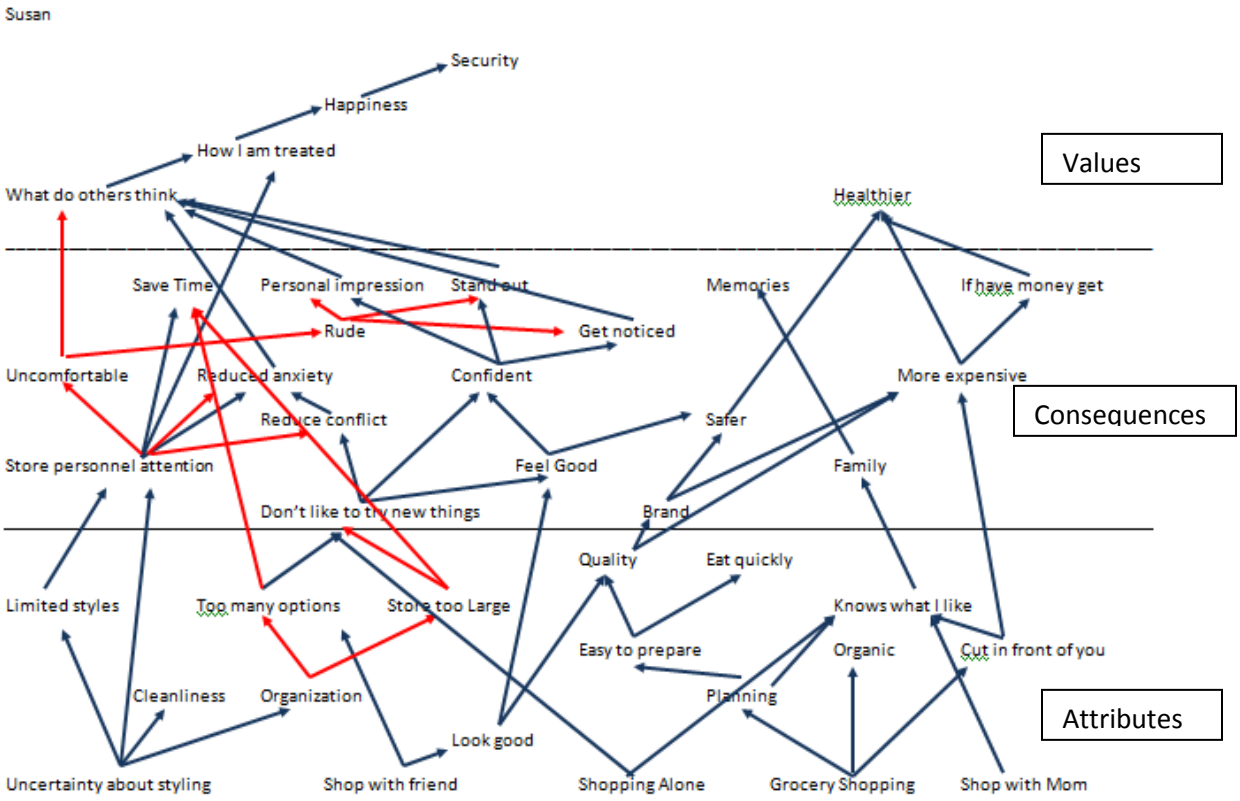
Ladder II - Teri



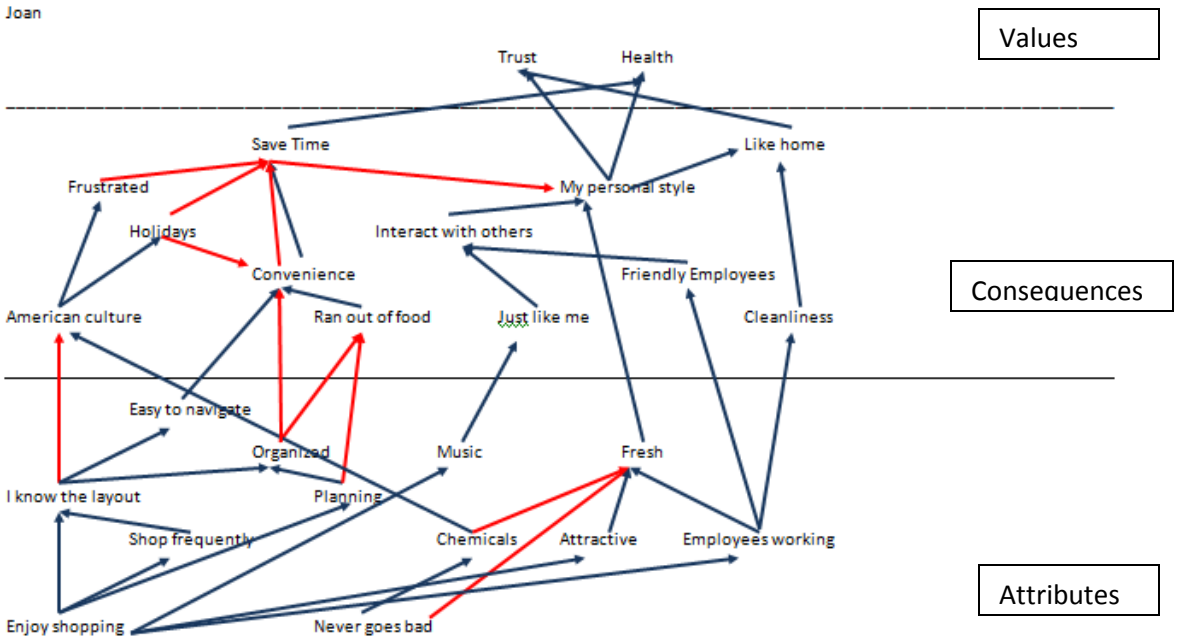
Ladder III - Amber



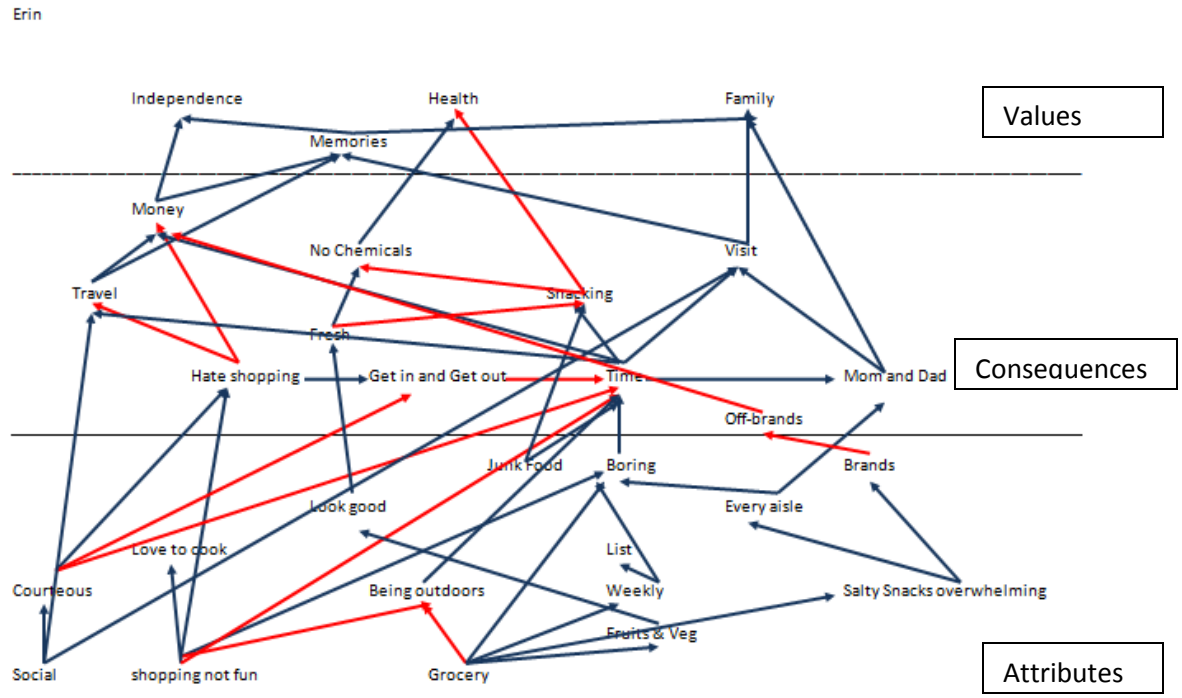
Ladder IV – Susan



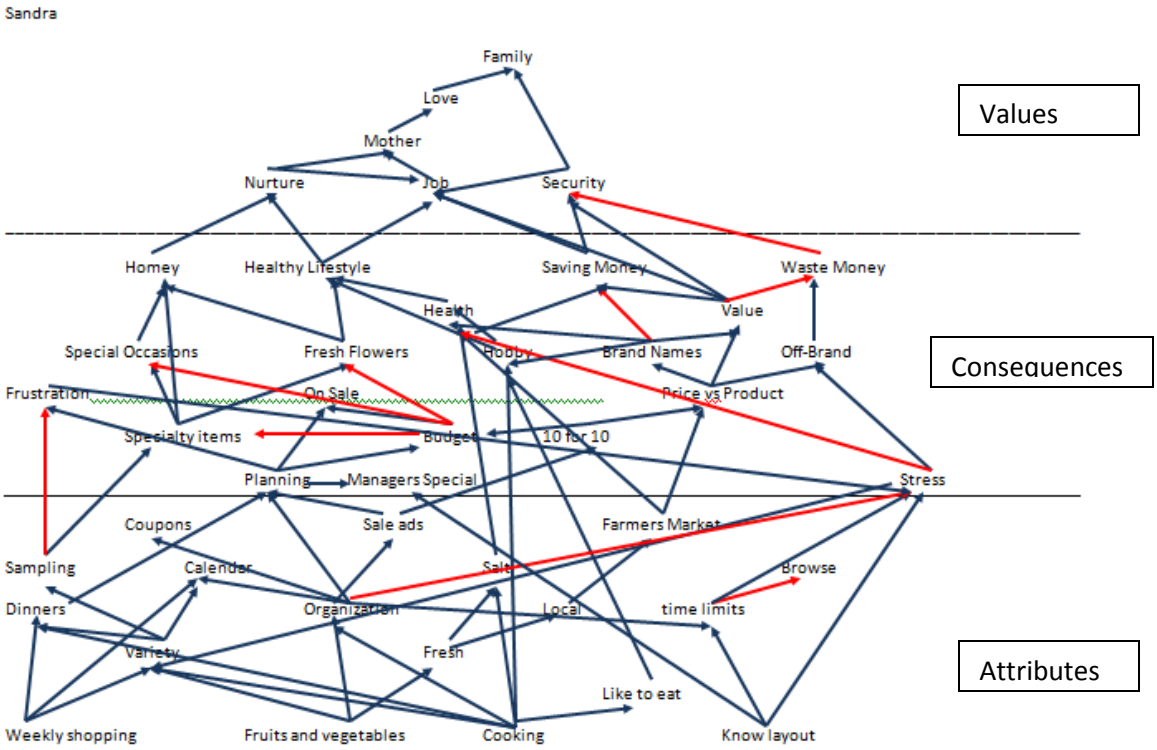
Ladder V – Joan



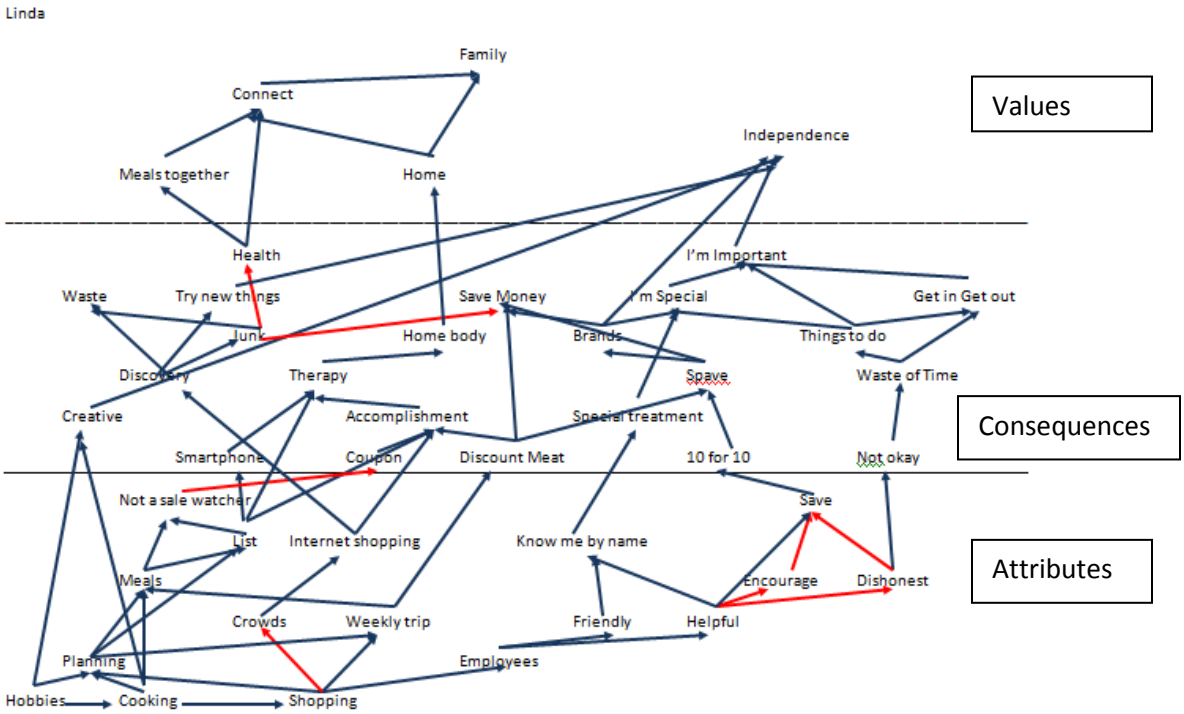
Ladder VI – Erin



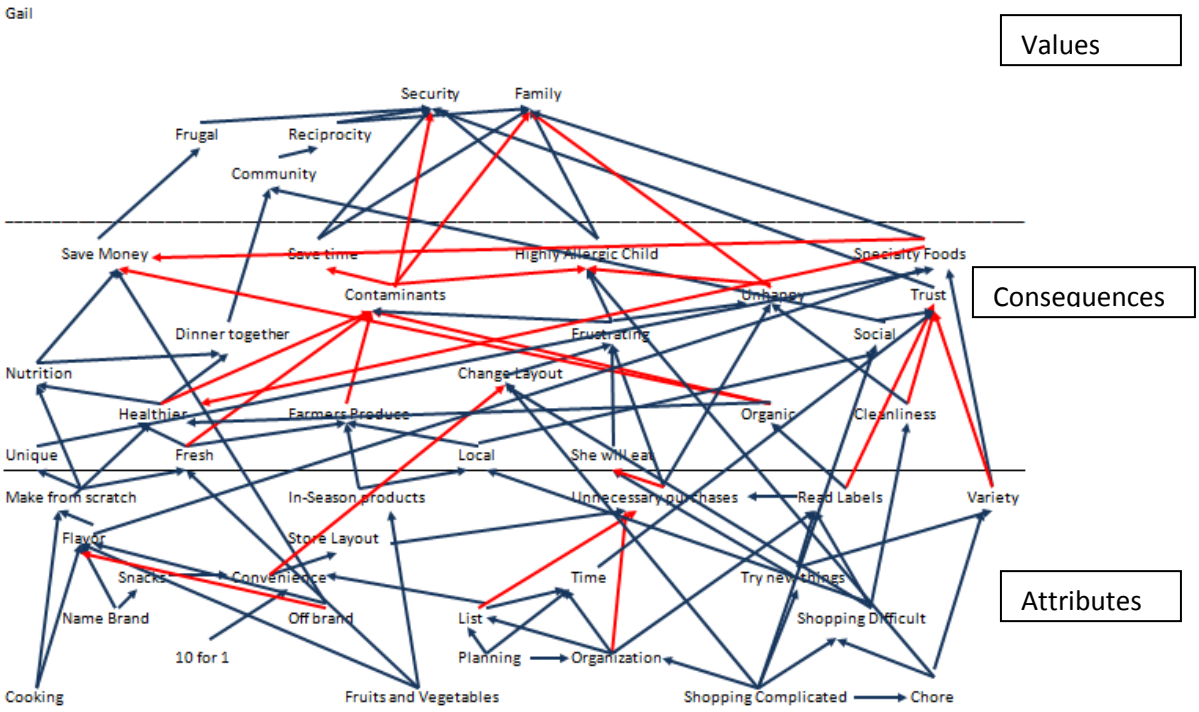
Ladder VII – Sandra



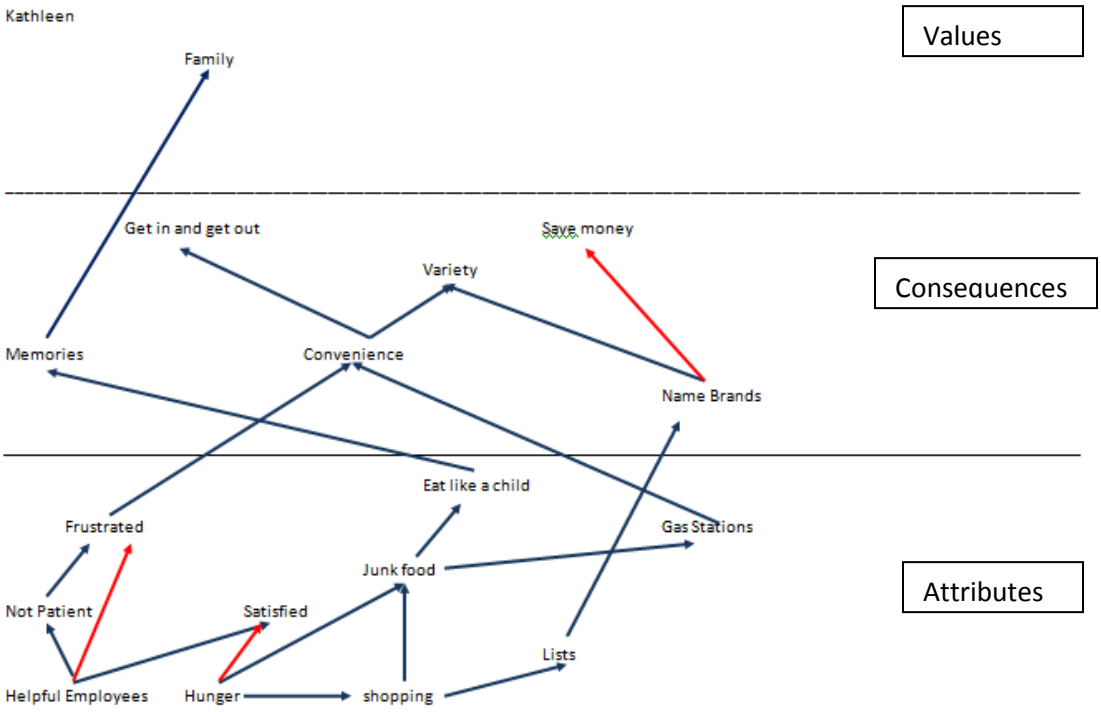
Ladder VIII – Linda



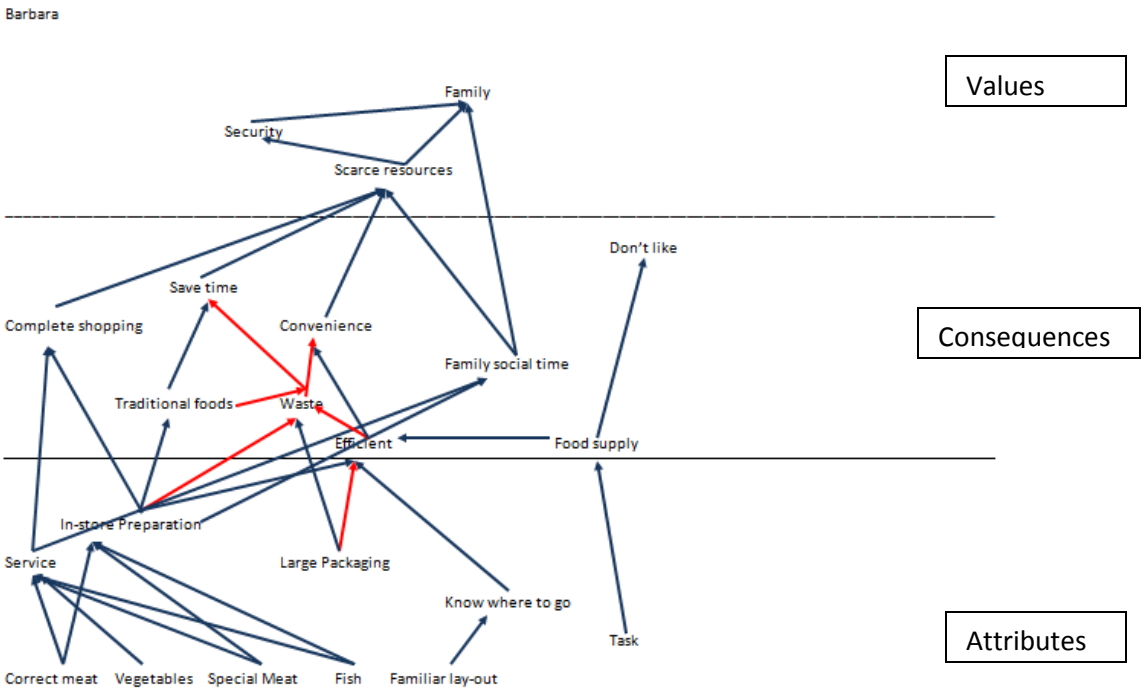
Ladder IX – Gail



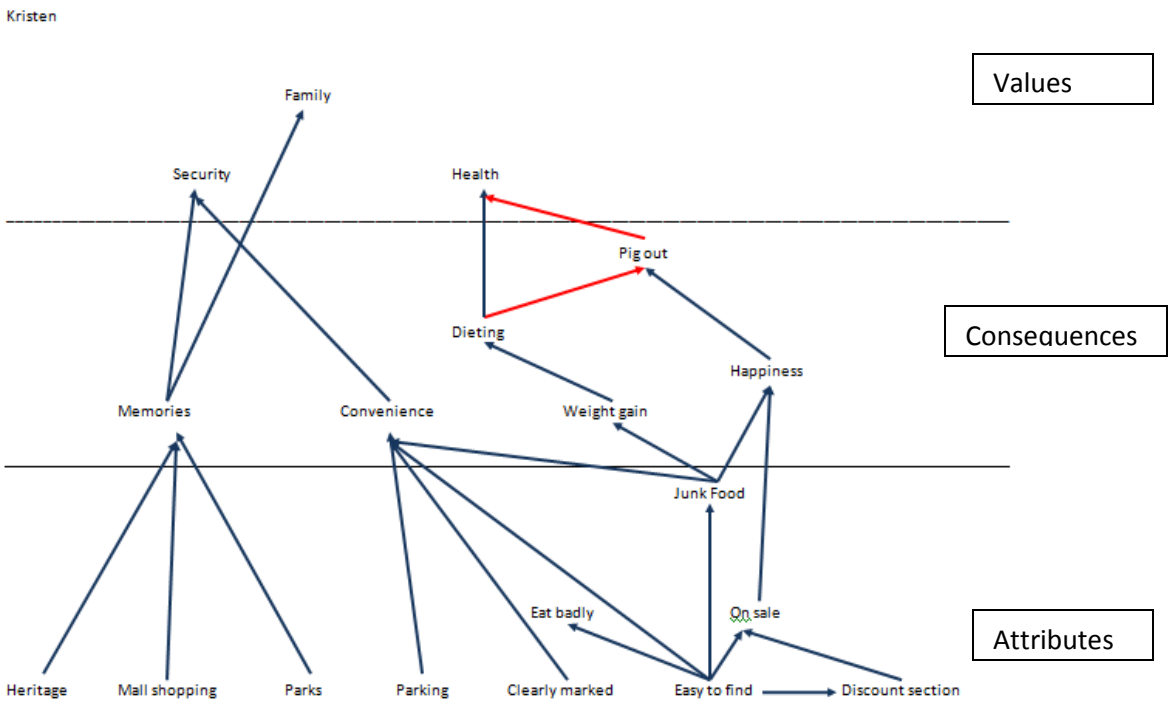
Ladder X – Kathleen



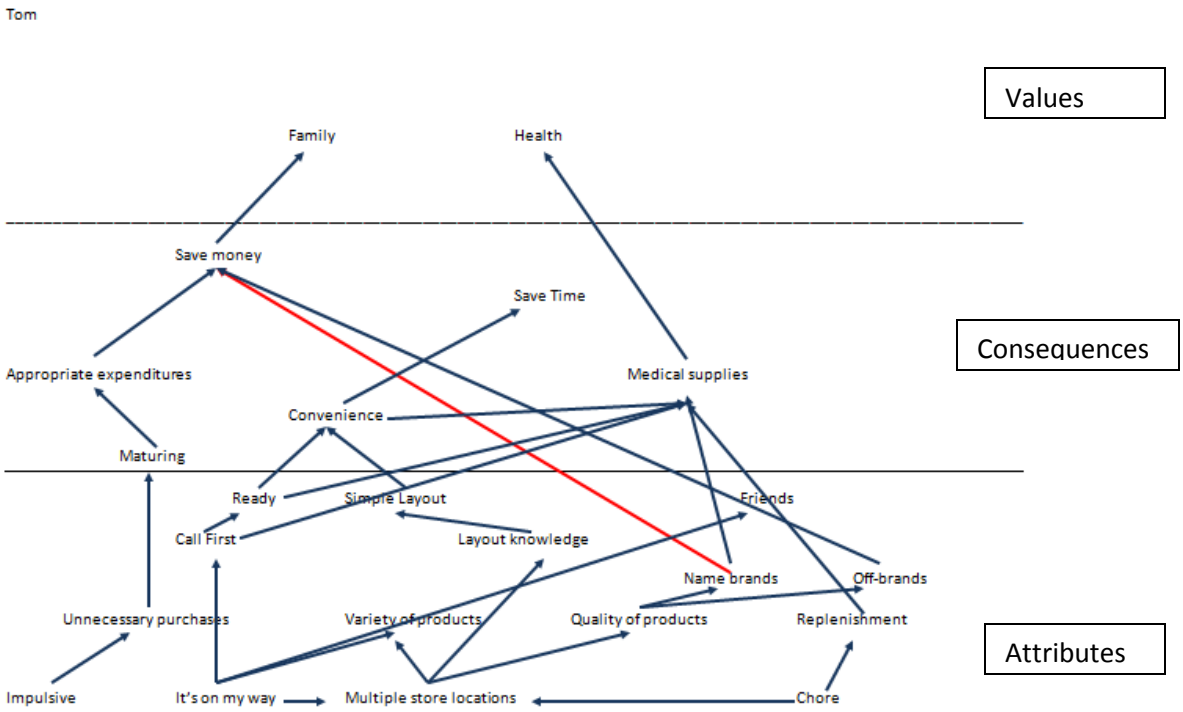
Ladder XI – Barbara



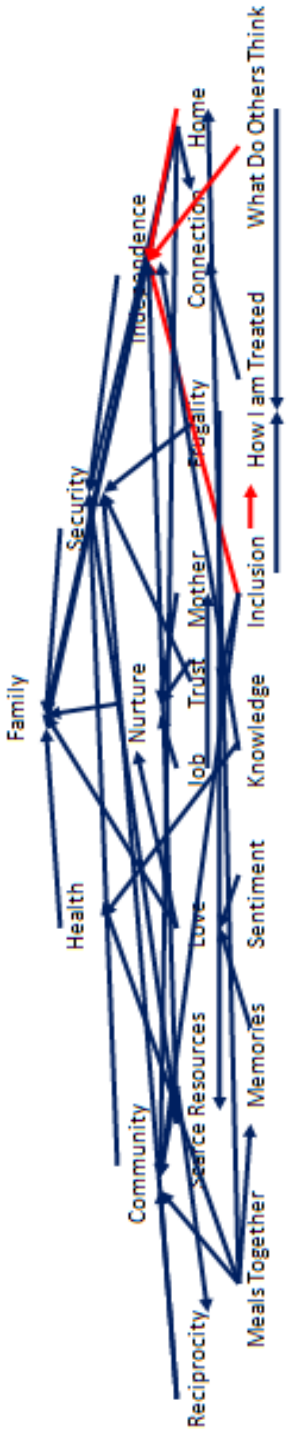
Ladder XII – Kristen



Ladder XIII – Tom



Ladder XIV – Theme Representation



Values

Appendix C
Final Survey

Salty Snack Shoppers Survey
Project# 12207
Final Questionnaire 1/12/2012

[INTRODUCTION]
Welcome to our survey! We appreciate your participation. Most of all, we value your openness and honesty in answering these questions. Please be assured that this survey is for informational purposes only. All responses from you will remain confidential and you will not be asked to buy anything today or in the future as a result of this survey.

Please be aware that after you have entered a response and have chosen to move forward to the next question, you may not be able to return to the previous page of the survey. *Please review each question and your responses carefully before proceeding.* Please use the arrow at bottom left of the screen to advance the survey. Do NOT use your browser's BACK button.

D1_INTRO:
First, please tell us a little about you. In the following questions, please select the response which BEST represents you.

D1. Are you…?

1. Male
2. Female

D2. Into which of the following groups does your age fall?

1. Under 18
2. 18-25
3. 26-35
4. 36-45
5. 46-55
6. Over 55

[IF D2=2-4 (AGE 18-45), CONTINUE. OTHERWISE, TERMINATE.]

D9. In what state do you currently reside?

Select a state: **[DROP DOWN]**
[CREATE A REGION PUNCH BASED ON RESPONSE TO D3.]

1a. Do you have either primary or shared responsibility for the grocery shopping in your household? (Select one.)

1. Yes
2. No

[IF Q1=1, CONTINUE. OTHERWISE, TERMINATE.]

1b. Which of the following products, if any, have you purchased for your household in the past month? (Select all that apply.)

[RANDOMIZE LIST]

1. Salty snacks such as potato chips, tortilla chips, pretzels, etc.
2. Yogurt
3. Snack bars such as granola bars, fruit/nut bars, protein bars, etc.
4. Cookies
5. Soft drinks
6. Sports/Energy drinks
7. Juice of any kind
8. None of the above **[FIXED; EXCLUSIVE]**

[IF Q1B=1, CONTINUE. OTHERWISE, TERMINATE.]

QUALIFY TO CONTINUE IF THE FOLLOWING ARE TRUE:

- **D2=2-4 (AGE 18-45)**
- **Q1A=1 (PRIMARY GROCERY SHOPPER)**
- **Q1B=1 (SALTY SNACKS)**

ASSIGN RESPONDENTS TO 1 OF 16 CELLS USING LEAST FILLED QUOTAS:

		Quotas		
Cell #	**Shopping Situation**	**Males**	**Females**	**Total**
1	The Neighborhood Newcomers' Meeting	17	16	33
2	The Neighborhood Newcomers' Meeting	16	16	32
3	The Neighborhood Newcomers' Meeting II	16	16	32
4	The Neighborhood Newcomers' Meeting II	16	17	33
5	The Gathering	17	16	33
6	The Gathering	16	16	32
7	The Gathering II	16	16	32
8	The Gathering II	16	17	33
9	The Neighborhood Newcomers' Meeting III	17	16	33
10	The Neighborhood Newcomers' Meeting III	16	16	32
11	The Neighborhood Newcomers' Meeting IV	16	16	32
12	The Neighborhood Newcomers' Meeting IV	16	17	33
13	The Gathering III	17	16	33
14	The Gathering III	16	16	32
15	The Gathering IV	16	16	32
16	The Gathering IV	16	17	33
	Total	260	260	520

BALANCE EACH CELL ON THE FOLLOWING DEMOS USING LEAST FILLED QUOTAS:

- **AGE (18-25, 26-35, 36-45)**
- **REGION (NORTHEAST, MIDWEST, SOUTH, WEST)**

Cell #	Shopping Situation	Rotation Order for Q2-Q5 and Q6-Q9
1	The Neighborhood Newcomers' Meeting	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
2	The Neighborhood Newcomers' Meeting	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
3	The Neighborhood Newcomers' Meeting II	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
4	The Neighborhood Newcomers' Meeting II	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
5	The Gathering	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
6	The Gathering	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
7	The Gathering II	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
8	The Gathering II	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
9	The Neighborhood Newcomers' Meeting III	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
10	The Neighborhood Newcomers' Meeting III	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
11	The Neighborhood Newcomers' Meeting IV	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
12	The Neighborhood Newcomers' Meeting IV	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
13	The Gathering III	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
14	The Gathering III	Ask Q6-Q9 1st; Ask Q2-Q5 2nd
15	The Gathering IV	Ask Q2-Q5 1st; Ask Q6-Q9 2nd
16	The Gathering IV	Ask Q6-Q9 1st; Ask Q2-Q5 2nd

[Q2-Q5 ARE THE BRAND/PRODUCT QUESTION SERIES]

2. The following question is about BRANDS. (NOTE: If the question had been about automobile brands, examples of responses might be Ford, Chevrolet or Toyota.)

   From the list below, please select your favorite BRAND of salty snacks. (Select one.)

   [MAINTAIN ALPHA ORDER]

   1. Archer Farms
   2. Cape Cod
   3. Cheetos
   4. Doritos
   5. Fritos
   6. Great Value
   7. Herr's
   8. Jay's
   9. Kettle Brand
   10. Lay's (including Wavy Lay's, Kettle Cooked Lay's)
   11. Miss Vickie's
   12. Mission
   13. Pringles
   14. Rold Gold
   15. Ruffles
   16. Santitas
   17. Snyder's
   18. Sun Chips
   19. Tostitos
   20. Utz
   21. Wise
   22. Zapp's

23. Other brand (Specify) **[FIXED POSITION]**

3. Now we would like you to think about your favorite brand of salty snacks, which you said was **[INSERT BRAND FROM Q2 IN BOLD FONT]**. Using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree, please indicate your level of agreement with each of the following statements about **[INSERT BRAND FROM Q2 IN BOLD FONT]**. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. I consider myself to be loyal to **[INSERT BRAND & BOLD]**
B. **[INSERT BRAND & BOLD]** would be my first choice
C. The likely quality of **[INSERT BRAND & BOLD]** is extremely high
D. I can recognize **[INSERT BRAND & BOLD]** among other competing brands
E. Some characteristics of **[INSERT BRAND & BOLD]** come to my mind quickly
F. It makes sense to buy **[INSERT BRAND & BOLD]** instead of any other brand, even if they are the same

4. The following question is about products that brands offer. (NOTE: If the question had been about products from automobile brands, examples of responses might be Ford F-150, Chevrolet Corvette or Toyota Camry.)

In the space below, please tell us your favorite salty snack from **[INSERT BRAND FROM Q2 IN BOLD FONT]**. (Please record below.)

[OPEN-END TEXT FIELD]

5. Using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree, please indicate your level of agreement with each of the following statements about your favorite salty snack: **[INSERT BRAND FROM Q2 IN BOLD FONT] [INSERT PRODUCT FROM Q4 IN BOLD FONT]**. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3

2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. I consider myself to be loyal to **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]**
B. **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]** would be my first choice
C. The likely quality of **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]** is extremely high
D. I can recognize **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]** among other competing products
E. It makes sense to buy **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]** instead of other products, even if the others are the same
F. Even if another product has the same features as **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]**, I would still prefer to buy **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]**
G. If another product is not different from **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]** in any way, it seems smarter to purchase **[INSERT BRAND & BOLD] [INSERT PRODUCT & BOLD]**

[Q6-Q9 ARE THE STORE/LOCATION QUESTION SERIES]

6. In the space below, please tell us the NAME of your favorite STORE for purchasing salty snacks. (Please record below.)

[OPEN-END TEXT FIELD]

7. Using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree, please indicate your level of agreement with each of the following statements about your favorite STORE for purchasing salty snacks: **[INSERT STORE FROM Q6 IN BOLD FONT]**. (Select one for each.)

[GRID HEADING]

7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. I consider myself to be loyal to **[INSERT STORE & BOLD]**
B. I can recognize **[INSERT STORE & BOLD]** among other competing stores
C. I am aware of **[INSERT STORE & BOLD]**
D. Some characteristics of **[INSERT STORE & BOLD]** come to my mind quickly
E. I can quickly recall the symbol or logo of **[INSERT STORE & BOLD]**
F. Even if another retailer has the same features as **[INSERT STORE & BOLD]**, I still prefer to shop with **[INSERT STORE & BOLD]**

8. For the following question please provide location information about your favorite STORE for purchasing salty snacks.

(NOTE: Examples of responses could be the name of a shopping or strip center where the STORE is located; road name or intersection the store can be found on/at; specific section or side of town where the store is located.)

In the space below, please tell us your favorite **[INSERT STORE FROM Q6 IN BOLD FONT]** LOCATION to purchase salty snacks. (Please record below.)

[OPEN-END TEXT FIELD]

9. Using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree, please indicate your level of agreement with each of the following statements about your favorite LOCATION of the STORE where you like to purchase salty snacks, **[INSERT STORE FROM Q6 IN BOLD FONT]**, located at **[INSERT LOCATION FROM Q8 IN BOLD FONT]**. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. I consider myself to be loyal to **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**
B. It makes sense to shop at **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]** instead of another, even if they are the same
C. Even if another store location has the same features as **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**, I still prefer to shop at **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**
D. If there is another store location as good as **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**, I still prefer to shop at **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**
E. If another store location is not different from **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]** in any way, it seems smarter to shop at **[INSERT STORE & BOLD] [INSERT LOCATION & BOLD]**

10. Please read the following brief description about an event you will participate in. Based on the scenario provided below think about how you would respond to the meeting and the shopping which will be required.

[INSERT SHOPPING SITUATION HERE BASED ON CELL ASSIGNMENT. SEE LAST PAGE OF QUESTIONNAIRE FOR TEXT.]

Cell #	Shopping Situation	Shopping Situation Title for Q11-Q29 (Do not bold this text)
1	The Neighborhood Newcomers' Meeting	The Neighborhood Newcomers' Meeting
2	The Neighborhood Newcomers' Meeting	The Neighborhood Newcomers' Meeting
3	The Neighborhood Newcomers' Meeting II	The Neighborhood Newcomers' Meeting
4	The Neighborhood Newcomers' Meeting II	The Neighborhood Newcomers' Meeting
5	The Gathering	The Gathering
6	The Gathering	The Gathering
7	The Gathering II	The Gathering
8	The Gathering II	The Gathering
9	The Neighborhood Newcomers' Meeting III	The Neighborhood Newcomers' Meeting
10	The Neighborhood Newcomers' Meeting III	The Neighborhood Newcomers' Meeting
11	The Neighborhood Newcomers' Meeting IV	The Neighborhood Newcomers' Meeting
12	The Neighborhood Newcomers' Meeting IV	The Neighborhood Newcomers' Meeting
13	The Gathering III	The Gathering
14	The Gathering III	The Gathering
15	The Gathering IV	The Gathering
16	The Gathering IV	The Gathering

Q11_INTRO:
All of your responses to the remaining questions in the survey are based on your understanding of the information provided about **[INSERT SHOPPING SITUATION TITLE]**. Please click the arrow at the bottom left of the screen to continue.

DISPLAY A LINK TO THE SHOPPING SITUATION STATEMENT ABOVE Q11-Q29:
"If you would like to review **[INSERT SHOPPING SITUATION TITLE]** scenario you read earlier please click here."

11. For the following statements, please indicate what BEST reflects your understanding of the PRODUCT you are to purchase for **[INSERT SHOPPING SITUATION TITLE]** using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4

3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. The salty snack I buy for **[INSERT SHOPPING SITUATION TITLE]** is extremely important to me
B. I am really very interested in the salty snack for **[INSERT SHOPPING SITUATION TITLE]**
C. I really enjoy buying the salty snack for **[INSERT SHOPPING SITUATION TITLE]**
D. **[INSERT SHOPPING SITUATION TITLE]** salty snacks are like giving a present
E. **[INSERT SHOPPING SITUATION TITLE]** salty snacks are a pleasure

12. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE toward **[INSERT SHOPPING SITUATION TITLE]**.

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Unimportant	❍	❍	❍	❍	❍	❍	❍	A. Important
B. Not Relevant	❍	❍	❍	❍	❍	❍	❍	B. Relevant
C. Does not matter to me	❍	❍	❍	❍	❍	❍	❍	C. Matters to me
D. Not Essential	❍	❍	❍	❍	❍	❍	❍	D. Essential
E. Not Needed	❍	❍	❍	❍	❍	❍	❍	E. Needed
F. Not Necessary	❍	❍	❍	❍	❍	❍	❍	F. Necessary

Q13 TEXT INSERT:
IF CELL = 1, 2, 5, 6, 9, 10, 13, 14 INSERT = "CONSUMER(S)"
IF CELL = 3, 4, 7, 8, 11, 12, 15, 16 INSERT = "RECIPIENT(S)"

13. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE toward the **[INSERT]** of the salty snack at **[INSERT SHOPPING SITUATION TITLE]**.

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Unimportant	❍	❍	❍	❍	❍	❍	❍	A. Important
B. Boring	❍	❍	❍	❍	❍	❍	❍	B. Interesting
C. Means nothing	❍	❍	❍	❍	❍	❍	❍	C. Means a lot to me
D. Unexciting	❍	❍	❍	❍	❍	❍	❍	D. Exciting
E. Uninvolving	❍	❍	❍	❍	❍	❍	❍	E. Involving
F. Mundane	❍	❍	❍	❍	❍	❍	❍	F. Fascinating
G. Irrelevant	❍	❍	❍	❍	❍	❍	❍	G. Relevant
H. Unappealing	❍	❍	❍	❍	❍	❍	❍	H. Appealing

14. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. I often feel that time spent shopping for the product for **[INSERT SHOPPING SITUATION TITLE]** is **NOT** wasted time
B. I get almost panicky when I don't have enough time to shop for the product for **[INSERT SHOPPING SITUATION TITLE]**
C. It does not upset me when I have to postpone things I had already planned so I can shop for the product for **[INSERT SHOPPING SITUATION TITLE]**
D. I would **NOT** put aside my shopping for the product for **[INSERT SHOPPING SITUATION TITLE]** and relax even when I feel like it
E. I feel guilty if I'm relaxing instead of shopping for the product for **[INSERT SHOPPING SITUATION TITLE]**
F. I seem to be more interested in **[INSERT SHOPPING SITUATION TITLE]** than ..... most of my friend

15. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE toward the PRODUCT required for **[INSERT SHOPPING SITUATION TITLE]**.

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Private	❍	❍	❍	❍	❍	❍	❍	A. Public
B. Not Flavorful	❍	❍	❍	❍	❍	❍	❍	B. Flavorful
C. Shame	❍	❍	❍	❍	❍	❍	❍	C. Proud
D. Hand Made	❍	❍	❍	❍	❍	❍	❍	D. Mass Produced
E. Unfamiliar	❍	❍	❍	❍	❍	❍	❍	E. Familiar
F. Unavailable	❍	❍	❍	❍	❍	❍	❍	F. Available
G. Unpleasant	❍	❍	❍	❍	❍	❍	❍	G. Pleasant
H. Unbranded	❍	❍	❍	❍	❍	❍	❍	H. Branded
I. Unreliable	❍	❍	❍	❍	❍	❍	❍	H. Reliable
J. Limited Choice	❍	❍	❍	❍	❍	❍	❍	H. Abundant Choice

16. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

I will participate in [INSERT SHOPPING SITUATION TITLE]...

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. because I believe that **[INSERT SHOPPING SITUATION TITLE]** is an important occasion for me
B. of my own personal decision
C. because I think participating in **[INSERT SHOPPING SITUATION TITLE]** is good for me
D. because I am doing it for my own good
E. because I feel good about participating in **[INSERT SHOPPING SITUATION TITLE]**
F. because I think that **[INSERT SHOPPING SITUATION TITLE]** is interesting
G. because I think **[INSERT SHOPPING SITUATION TITLE]** is a pleasant occasion

H. because **[INSERT SHOPPING SITUATION TITLE]** is fun

17. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. I feel certain about how much authority I have to prepare for **[INSERT SHOPPING SITUATION TITLE]**
B. I have clear goals and plans for **[INSERT SHOPPING SITUATION TITLE]**
C. I know that I have divided my time properly for **[INSERT SHOPPING SITUATION TITLE]**
D. I know what my responsibilities for **[INSERT SHOPPING SITUATION TITLE]** are
E. I feel certain how I will be evaluated for **[INSERT SHOPPING SITUATION TITLE]**

18. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. I am concerned about what others who are important to me at **[INSERT SHOPPING SITUATION TITLE]** would think of the product(s) I purchase for this occasion
B. I want to purchase for **[INSERT SHOPPING SITUATION TITLE]** what others important to me think I should buy
C. Most people who are important to me think this product is important to **[INSERT SHOPPING SITUATION TITLE]**
D. Others who are important to me think I should do a good job selecting product for **[INSERT SHOPPING SITUATION TITLE]**
E. Most people who are important to me think that the brand of salty snack is important for **[INSERT SHOPPING SITUATION TITLE]**

F. Most people whose opinions I value think it is important to have the salty snack for **[INSERT SHOPPING SITUATION TITLE]** come from a specific retailer (store name)
G. Most people whose opinions I value think that the flavor of the salty snack is important for **[INSERT SHOPPING SITUATION TITLE]**
H. Most people whose opinions I value think it is important to have the salty snack for **[INSERT SHOPPING SITUATION TITLE]** come from a specific store location19. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE.My ATTITUDE toward the ATMOSPHERE at **[INSERT SHOPPING SITUATION TITLE]** is that it will be:

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Unpleasant	❍	❍	❍	❍	❍	❍	❍	A. Pleasant
B. Strangers	❍	❍	❍	❍	❍	❍	❍	B. Friends
C. Not Related	❍	❍	❍	❍	❍	❍	❍	C. Related
D. Distant	❍	❍	❍	❍	❍	❍	❍	D. Close
E. Not Comfortable	❍	❍	❍	❍	❍	❍	❍	E. Comfortable
F. Unfamiliar	❍	❍	❍	❍	❍	❍	❍	F. Familiar

20. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE.

My ATTITUDE toward how LONG **[INSERT SHOPPING SITUATION TITLE]** will last is:

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Short	❍	❍	❍	❍	❍	❍	❍	A. Long
B. Quick	❍	❍	❍	❍	❍	❍	❍	B. Lingering
C. Appropriate	❍	❍	❍	❍	❍	❍	❍	C. Inappropriate
D. Over Soon	❍	❍	❍	❍	❍	❍	❍	D. Drag On

21. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE.

My ATTITUDE toward the LOCATION where **[INSERT SHOPPING SITUATION TITLE]** will be is:

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Unpleasant	❍	❍	❍	❍	❍	❍	❍	A. Pleasant
B. Exclusive	❍	❍	❍	❍	❍	❍	❍	B. Open
C. Unfamiliar	❍	❍	❍	❍	❍	❍	❍	C. Familiar
D. Private	❍	❍	❍	❍	❍	❍	❍	D. Public
E. Uncomfortable	❍	❍	❍	❍	❍	❍	❍	E. Comfortable

22. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please select the button for each word pair that BEST represents your ATTITUDE.

My ATTITUDE toward when **[INSERT SHOPPING SITUATION TITLE]** will be is:

[RANDOMIZE ROWS]

SCALE: (Do not display)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	
A. Immediate	❍	❍	❍	❍	❍	❍	❍	A. Distant
B. Short	❍	❍	❍	❍	❍	❍	❍	B. Long
C. Right Now	❍	❍	❍	❍	❍	❍	❍	C. In The Future
D. Now	❍	❍	❍	❍	❍	❍	❍	D. Later

23. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate which option would BEST reflect your level of agreement with each statement.

[GRID HEADING]
1. Unimportant
2. Important

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. The CONSUMER(S) described as the focus of **[INSERT SHOPPING SITUATION TITLE]** were _____ to you
B. **[INSERT SHOPPING SITUATION TITLE]** as described was _____ to you

24. According to the shopping trip described in **[INSERT SHOPPING SITUATION TITLE]** scenario you were shopping:

1. Alone
2. With Another

[IF CELL = 9-16 CONTINUE. OTHERWISE, SKIP TO Q.26.]

25. According to the shopping trip described in **[INSERT SHOPPING SITUATION TITLE]** scenario, the person ~~who was~~ shopping with you was _____ of your shopping style.

1. Supporting
2. NOT Supportive

26. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

Cell #	Shopping Situation	Rotation Order for Statements A-D
1	The Neighborhood Newcomers' Meeting	Ask A/B 1st; Ask C/D 2nd
2	The Neighborhood Newcomers' Meeting	Ask C/D 1st; Ask A/B 2nd
3	The Neighborhood Newcomers' Meeting II	Ask A/B 1st; Ask C/D 2nd
4	The Neighborhood Newcomers' Meeting II	Ask C/D 1st; Ask A/B 2nd
5	The Gathering	Ask A/B 1st; Ask C/D 2nd
6	The Gathering	Ask C/D 1st; Ask A/B 2nd
7	The Gathering II	Ask A/B 1st; Ask C/D 2nd
8	The Gathering II	Ask C/D 1st; Ask A/B 2nd
9	The Neighborhood Newcomers' Meeting III	Ask A/B 1st; Ask C/D 2nd
10	The Neighborhood Newcomers' Meeting III	Ask C/D 1st; Ask A/B 2nd
11	The Neighborhood Newcomers' Meeting IV	Ask A/B 1st; Ask C/D 2nd
12	The Neighborhood Newcomers' Meeting IV	Ask C/D 1st; Ask A/B 2nd
13	The Gathering III	Ask A/B 1st; Ask C/D 2nd
14	The Gathering III	Ask C/D 1st; Ask A/B 2nd
15	The Gathering IV	Ask A/B 1st; Ask C/D 2nd
16	The Gathering IV	Ask C/D 1st; Ask A/B 2nd

The MOST important part of purchasing product(s) for [INSERT SHOPPING SITUATION TITLE] is...

[ROTATE LIST BASED ON TABLE ABOVE; DISPLAY DYNAMICALLY]
A. that the product be from **[INSERT BRAND FROM Q2 IN BOLD FONT]**

B. that the product be **[INSERT BRAND FROM Q2 IN BOLD FONT] [INSERT PRODUCT FROM Q4 IN BOLD FONT]**
C. that the purchase come from any **[INSERT STORE FROM Q6 IN BOLD FONT]**
D. that the purchase come from **[INSERT STORE FROM Q6 IN BOLD FONT] [INSERT LOCATION FROM Q8 IN BOLD FONT]**

27. Using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree, please indicate your level of agreement with each statement below about the BEST solution for the shopping required for **[INSERT SHOPPING SITUATION TITLE]**. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]
A. The STORE where the purchase required for **[INSERT SHOPPING SITUATION TITLE]** comes from does NOT matter
B. The specific store LOCATION for the purchase required for **[INSERT SHOPPING SITUATION TITLE]** does NOT matter
C. The BRAND of salty snack for the purchase required for **[INSERT SHOPPING SITUATION TITLE]** does NOT matter
D. The type of SALTY SNACK for the purchase required for **[INSERT SHOPPING SITUATION TITLE]** does NOT matter

28. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

Cell #	Shopping Situation	Rotation Order for Statements A-D
1	The Neighborhood Newcomers' Meeting	Ask A/B 1st; Ask C/D 2nd
2	The Neighborhood Newcomers' Meeting	Ask C/D 1st; Ask A/B 2nd
3	The Neighborhood Newcomers' Meeting II	Ask A/B 1st; Ask C/D 2nd
4	The Neighborhood Newcomers' Meeting II	Ask C/D 1st; Ask A/B 2nd
5	The Gathering	Ask A/B 1st; Ask C/D 2nd
6	The Gathering	Ask C/D 1st; Ask A/B 2nd
7	The Gathering II	Ask A/B 1st; Ask C/D 2nd
8	The Gathering II	Ask C/D 1st; Ask A/B 2nd
9	The Neighborhood Newcomers' Meeting III	Ask A/B 1st; Ask C/D 2nd
10	The Neighborhood Newcomers' Meeting III	Ask C/D 1st; Ask A/B 2nd
11	The Neighborhood Newcomers' Meeting IV	Ask A/B 1st; Ask C/D 2nd
12	The Neighborhood Newcomers' Meeting IV	Ask C/D 1st; Ask A/B 2nd
13	The Gathering III	Ask A/B 1st; Ask C/D 2nd
14	The Gathering III	Ask C/D 1st; Ask A/B 2nd
15	The Gathering IV	Ask A/B 1st; Ask C/D 2nd
16	The Gathering IV	Ask C/D 1st; Ask A/B 2nd

When purchasing product(s) for [INSERT SHOPPING SITUATION TITLE]...

[ROTATE LIST BASED ON TABLE ABOVE; DISPLAY DYNAMICALLY]

A. I will only purchase products from **[INSERT BRAND FROM Q2 IN BOLD FONT]**
B. I will only purchase **[INSERT BRAND FROM Q2 IN BOLD FONT] [INSERT PRODUCT FROM Q4 IN BOLD FONT]**
C. I will only purchase from **[INSERT STORE FROM Q6 IN BOLD FONT]**
D. I will only purchase at **[INSERT STORE FROM Q6 IN BOLD FONT] [INSERT LOCATION FROM Q8 IN BOLD FONT]**

29. Based on your understanding from reading **[INSERT SHOPPING SITUATION TITLE]** scenario, please indicate your level of agreement with each of the following statements using a scale from 1 to 7, where 7=Strongly Agree and 1=Strongly Disagree. (Select one for each.)

[GRID HEADING]
7 – Strongly Agree
6
5
4
3
2
1 – Strongly Disagree

[RANDOMIZE LIST; DISPLAY DYNAMICALLY]

A. The Store is the most important choice for the purchase required for **[INSERT SHOPPING SITUATION TITLE]**

B. The Product is the most important choice for the purchase required for **[INSERT SHOPPING SITUATION TITLE]**
C. The Store Location is the most important choice for the purchase required for **[INSERT SHOPPING SITUATION TITLE]**
D. The Brand is the most important choice for the purchase required for **[INSERT SHOPPING SITUATION TITLE]**

D3_INTRO:
These last few questions are for classification purposes only.

D3. Which of the following choices would best describe your race? (Select one.)

1. White/Caucasian
2. African American
3. Hispanic
4. Asian
5. Native American
6. Pacific Islander
7. Other
8. I prefer not to answer

D4. Please indicate your current family structure. (Select one.)

1. Single without children
2. Single with children
3. Married without children
4. Married with children
5. Life partner without children
6. Life partner with children

D5. What is your current work status? (Select one.)

1. Employed full-time
2. Employed part-time
3. Retired
4. Not currently employed

D6. What is your current student status? (Select one.)

1. Student full-time
2. Student part-time
3. Not currently a student

D7. What is the highest level of education you have completed? (Select one.)

1. Less than High School
2. High School / GED
3. Some College
4. 2-year College Degree
5. 4-year College Degree
6. Masters Degree
7. Doctoral Degree
8. Professional Degree (JD, MD)

D8. What is your annual income range? (Select one.)

1. Below $20,000
2. $20,000 - $29,999
3. $30,000 - $39,999
4. $40,000 - $49,999
5. $50,000 - $59,999
6. $60,000 - $69,999
7. $70,000 - $79,999
8. $80,000 - $89,999
9. $90,000 or more
10. I prefer not to answer

Thank you for participating in our survey. Your thoughts and opinions are very important to us.

Appendix D

Experimental Manipulation Surveys

CELLS 1 & 2: The Neighborhood Newcomers' Meeting

The Neighborhood Newcomers' Meeting

You are at home reviewing your calendar and you are surprised to find a note where you have agreed to provide a SALTY SNACK for a neighborhood newcomers' meeting being held tomorrow. You have **NO** interest in these meetings and almost never attend. You also do not know anyone who does attend these meetings. At this point you check to see if you have any SALTY SNACKS on hand, and unfortunately you do not.

As you further review your calendar you also notice that the only time you have available before the meeting to purchase a SALTY SNACK is right now. So, you head immediately out to purchase a SALTY SNACK.

CELLS 3 & 4: The Neighborhood Newcomers' Meeting II

The Neighborhood Newcomers' Meeting

You are at home reviewing your calendar and you are surprised to find a note reminding you to provide a SALTY SNACK for a neighborhood newcomers' meeting being held tomorrow. You are surprised because you have **NO** interest in these meetings and almost never attend. However, the reminder indicates that your **BEST FRIEND** is hosting this meeting. You recall telling your **BEST FRIEND** that you would bring a SALTY SNACK to help make this meeting successful for them. At this point you check to see if

you may have a SALTY SNACK on hand that would please your **BEST FRIEND**. Unfortunately you do not.

As you further review your calendar you also notice that the only time you have available before the meeting to purchase a SALTY SNACK for your **BEST FRIEND** is right now. So you head immediately out to purchase the SALTY SNACK for your **BEST FRIEND**.

CELLS 5 & 6: The Gathering

The SPECIAL GATHERING

You are at home reviewing your plans for a **SPECIAL GATHERING** you have been invited to attend tomorrow. These **SPECIAL GATHERINGS** are for a select group of people who must be invited to attend. Attending this **SPECIAL GATHERING** is likely to be very beneficial for you in a number of ways. You and others have been asked by the **HOST** to provide some kind of SALTY SNACK. You do not know this **HOST** and she has told you that this will be her last time hosting one of these **SPECIAL GATHERINGS**, as she and her husband are moving. You check to see if you have any SALTY SNACKS on hand. Unfortunately you do not.

You happen to glance at your calendar and you realize that the only time you have available before the **SPECIAL GATHERING** to purchase a SALTY SNACK is right now. So you head immediately out to purchase a SALTY SNACK.

CELLS 7 & 8: The Gathering II

The SPECIAL GATHERING

You are at home reviewing your plans for a **SPECIAL GATHERING** you have been invited to attend tomorrow. These **SPECIAL GATHERINGS** are for a select group of people who must be invited to attend. Attending this **SPECIAL GATHERING** is likely to be very beneficial for you in a number of ways. Furthermore, the host of this **SPECIAL GATHERING** is your **BEST FRIEND**. Your **BEST FRIEND** wants this to be a successful **SPECIAL GATHERING** and has asked you to provide the SALTY SNACKS. At this point you check to see if you may have SALTY SNACKS on hand that would please your **BEST FRIEND** and work for this **SPECIAL GATHERING**. Unfortunately you do not.

You happen to glance at your calendar and you realize that the only time you have available before this **SPECIAL GATHERING** to purchase these SALTY SNACKS for your **BEST FRIEND** is right now. So you head immediately out to purchase the SALTY SNACKS.

CELLS 9 & 10: The Neighborhood Newcomers' Meeting III

The Neighborhood Newcomers' Meeting

You are at home with a friend when you glance at your calendar and you are surprised to find a note where you have agreed to provide a SALTY SNACK for a neighborhood newcomers' meeting being held tomorrow. You have **NO** interest in these meetings and almost never attend. You also do not know anyone who does attend these meetings. At

this point you check to see if you have any SALTY SNACKS on hand, and unfortunately you do not.

As you look closer at your calendar you also notice that the only time you have available to purchase a SALTY SNACK for this meeting is right now. You tell your friend that you need to head out immediately to purchase some kind of SALTY SNACK. Your friend asks to come along. Unfortunately, this friend is the complete shopping opposite of you. Your friend does not like where you shop, the way you shop, and particularly does not like SALTY SNACKS. Your friend seems to take special pleasure in explaining everything that you do wrong while shopping. With more than a little hesitation, you and your friend head out immediately to purchase any kind of SALTY SNACK you can find.

CELLS 11 & 12: The Neighborhood Newcomers' Meeting IV

The Neighborhood Newcomers' Meeting

You are at home with a friend when you glance at your calendar and you are surprised to find a note reminding you to provide a SALTY SNACK for a neighborhood newcomers' meeting being held tomorrow. You are surprised because you have **NO** interest in these meetings and almost never attend. However, the reminder indicates that your **BEST FRIEND** is hosting this meeting. You recall telling your **BEST FRIEND** that you would bring a SALTY SNACK to help make this meeting successful for them. At this point you check to see if you may have a SALTY SNACK on hand that would please your **BEST FRIEND**. Unfortunately you do not.

As you look closer at your calendar you also notice that the only time you have available to purchase the SALTY SNACK for your **BEST FRIEND** is right now. You tell your friend that you need to head out immediately to purchase a SALTY SNACK. Your friend asks to come along. Unfortunately, this friend is the complete shopping opposite of you. Your friend does not like where you shop, the way you shop, and particularly does not like SALTY SNACKS. Your friend seems to take special pleasure in explaining everything that you do wrong while shopping. With more than a little hesitation, you and your friend head out immediately to purchase the SALTY SNACK for your **BEST FRIEND**.

CELLS 13 & 14: The Gathering III

The SPECIAL GATHERING

You are at home with a friend talking about your plans for a **SPECIAL GATHERING** you have been invited to attend tomorrow. These **SPECIAL GATHERINGS** are for a select group of people who must be invited to attend. Attending this **SPECIAL GATHERING** is likely to be very beneficial for you in a number of ways. You and others have been asked by the **HOST** to provide some kind of SALTY SNACK. You do not know this **HOST** and she has told you that this will be her last time hosting the SPECIAL GATHERING, as she and her husband are moving. You check to see if you have any kind of SALTY SNACK on hand. Unfortunately you do not.

You happen to glance at your calendar and you realize that the only time you have available before the gathering to purchase a SALTY SNACK is right now. You tell your

friend that you need to head out immediately to purchase a SALTY SNACK. Your friend asks to come along. Unfortunately, this friend is the complete shopping opposite of you. Your friend does not like where you shop, the way you shop, and particularly does not like SALTY SNACKS. Your friend seems to take special pleasure in explaining everything that you do wrong while shopping. With more than a little hesitation, you and your friend head out immediately to purchase a SALTY SNACK.

CELLS 15 & 16: The Gathering IV

The SPECIAL GATHERING

You are at home with a friend talking about your plans for a **SPECIAL GATHERING** you have been invited to attend tomorrow. These **SPECIAL GATHERINGS** are for a select group of people who must be invited to attend. Attending this **SPECIAL GATHERING** is likely to be very beneficial for you in a number of ways. Furthermore, the host of this **SPECIAL GATHERING** is your **BEST FRIEND**. Your **BEST FRIEND** wants this to be a successful **SPECIAL GATHERING** and has asked you to provide the SALTY SNACKS. At this point you check to see if you may have SALTY SNACKS on hand that would please your **BEST FRIEND** and work for this **SPECIAL GATHERING**. Unfortunately you do not.

You happen to glance at your calendar and you realize that the only time you have available before the gathering to purchase the SALTY SNACKS is right now. You tell your friend that you need to head out immediately to purchase the SALTY SNACKS. Your friend asks to come along. Unfortunately, this friend is the complete shopping

opposite of you. Your friend does not like where you shop, the way you shop, and particularly does not like SALTY SNACKS. Your friend seems to take special pleasure in explaining everything that you do wrong while shopping. With more than a little hesitation, you and your friend head out immediately to purchase the SALTY SNACKS for your **BEST FRIEND'S SPECIAL GATHERING**.

Table 24 *Scenario Recap by Cell*

Cell	Shopping Context	Importance		Social Shopping Situation
		Occasion	Recipient	
1	Quick Fill-in	Un-important	Un-important	Self (Alone)
2	Quick Fill-in	Un-important	Important	Self (Alone)
3	Quick Fill-in	Important	Un-important	Self (Alone)
4	Quick Fill-in	Important	Important	Self (Alone)
5	Quick Fill-in	Un-important	Un-important	With Another Not- Supportive
6	Quick Fill-in	Un-important	Important	With Another Not- Supportive
7	Quick Fill-in	Important	Un-important	With Another Not- Supportive
8	Quick Fill-in	Important	Important	With Another Not- Supportive

Appendix E

Development of Scale Items Related to Research Variables

Occasion Dimension Scale

A dictionary definition for occasion provides the reader with a variety of occasion *options (e.g., birthdays, anniversaries, special* occasions, etc). (Encyclopedia Brittanica, 2010). It is clear there are a myriad of occasions, the breadth of which would be daunting to identify. Cataloging would require the investigation of familial, cultural, religious, social and institutional occasions in pursuit of an exhaustive list. Furthermore, vigilance would be required to maintain the accuracy of such a list, once compiled, to capture new occasions that may arise. The process of constructing such a list has been described by one researcher as "false hope" (R. W. Belk, 1975, p. 162). However, some researchers have attempted to examine occasion, using a categorical perspective.

The occasion category inventories have been generated from mainly two perspectives with varying results (R. W. Belk, 1975; Hall & Lockshin, 2000). The results of the two approaches can be seen below in Table 25. Belk (1974) outlines ten occasions while Hall and Lockshin (2000) outlines eight (two of the variables overlapped as requiring friends and therefore one was deleted from the list leaving seven). The Belk list was generated related to snack purchasing while the Hall and Lockshin list was developed related to wine purchasing (R. W. Belk, 1975; Hall & Lockshin, 2000). An examination of either list reveals that neither is exhaustive and the

items included are not mutually exclusive as required of a scale (Churchill & Iacobucci, 2002). (See Table 25)

For example the party in the Belk (1974) list may be inclusive of family, friends, neighbors, and self, all of which are items also on the list. Examining the Hall and Lockshin (2000) list reveals the same overlap (including the exclusion of one as already noted). Additionally, benefit can be gained from combining both lists together as the Hall and Lockshin list adds value by

Table 25 *Occasion Typology Comparison* (Belk, 1974; Hall & Lockshin, 2000)

Occasion (Situation) Comparison Table	
Belk	Hall and Lockshin
Family	Family
Party	Party/Celebration
Friends	Friends
Neighbors	BBQ/Picnic
Self	Self
Novelty	**********
Travel	**********
Unanticipated Event	**********
Serendipity	**********
Planned	**********
**********	Intimate
**********	Business

adding both intimate and business occasions which are not part of the Belk (1974) list which creates a more complete inventory of occasions. (See Table 26) Interestingly, neither list contains any mention of dimensionality. Yet several of the items listed as

occasions, are in fact dimensions (e.g., planned). For example Hall and Lockshin (2000) consider party and celebration to be the same where Belk (1974) fails to include celebration at all. However, there are myriad reasons to have or to attend a party that does not include a celebration of any kind. Furthermore, there is no mention of the impetus for the party, yet dimensions in the lists would relate to a party. Party could be with friends, family or business. But the combination of these items in a single list only serves to limit the occasion options.

Table 26 *Combined Occasion Typologies* (Belk, 1974; Hall & Lockshin, 2000)

Occasion Typology Table
Family
Party
Friends
Neighbors
Self
Novelty
Travel
Unanticipated Event
Serendipity
Planned
Intimate
Business

Further examination of the lists begins to identify aspects of occasion which if used in combination might serve to describe a specific occasion. Dimensions represented in the lists serve not only to describe the occasion, but could apply to attributes associated

with product required for the occasion. Dimensions, it has been argued are uniquely qualified to measure subjective and complex social phenomena (Wolf, 1978). Shopper value assessment, by its very nature, would qualify as a complex social phenomenon.

Therefore, a further refinement of the occasion list can be proposed utilizing the dimensionality implied in the list found in Table 25. Through refinement, a series of dimensions are defined that relate to the identified occasions. A dimension associated with preparation, planned versus unplanned, can be used to describe both the purpose of the trip (occasion), as well as the object of the trip (product). Novelty, dimensionally related to shopper knowledge, applies equally to the occasion and the product and can be described as either familiar or novel. Serendipity relates to openness, and can be represented by open meaning unplanned (spontaneous, serendipitous) to closed or planned for an event or similarly for the product, serendipitous, or unplanned purchase to planned or replenishment. Therefore an example of a dimensional list related to occasion noted in Table 18 can be seen in Table 27.

While this representation offers more clarity and comprehension, it too is not exhaustive and clearly does not accommodate object/product. In order to accomplish this, occasion must be examined from an even more abstract positioning which allows further exposition of the elements comprising an occasion.

Occasion at its broadest conception is comprised of two main components; domain, relating to the situation and object relating to focal elements (R. W. Belk, 1975; Chung, et al., 2005). Each of these elements can be described in terms of five main dimensions; time, space, content, person, and aggregate (Chung, et al., 2005).

Table 27 *Occasion Dimensions*

Occasion Dimension Table
Immediate to Distant
Casual to Formal
Close to Distant
Replenishment to Novelty
Somber to Celebratory
Unplanned to Planned
Intimate to public
Personal to business
Self to Others

From a shopper perspective, these dimensions represent elements of the occasion and simultaneously represent attributes associated with the product need. Within each of the two main dimensions of domain and object, five sub-dimensions would be listed. The first four, time, space, person and content relate to the shopper's perception of the need occasion. Aggregate, measures prior knowledge associated with the occasion. The resulting dimensional table breaks down into two separate lists; Shopper Dimensions of Occasion (SDO), and Shopper Dimension of Occasion Product list (SDOP). A representation of this chart can be seen in Table 28.

While the dimensions represented in these lists reflect the current literature, much more work will need to be done analyzing additional dimensions along with qualitative research to validate the comprehensive nature of the list of dimensions, which is beyond the scope of this conceptual investigation.

Table 28 *Dimensions Related to Occasion and Product*

	Shopper Dimensions of Occasion List (SDO)			Shopper Dimension of Occasion Product List (SDOP)	
Dimension	Sub-Dimensions			Sub-Dimensions	
Time	Immediate	Distant		Immediate	Distant
	Short	Long			
	Available	Unavailable			
Space	Close	Distant		Close	Distant
	Indoor	Outdoor		Indoor	Outdoor
	Casual	Formal		Casual	Formal
	Unfamiliar	Familiar		Unfamiliar	Familiar
	Comfortable	Uncomfortable		Comfortable	Uncomfortable
	Intimate	Public		Intimate	Public
	Cold	Hot		Cold	Hot
	Pleasant	Unpleasant		Pleasant	Unpleasant
Content	Casual	Formal		Casual	Formal
	Intimate	Public		Intimate	Public
	Somber	Celebratory		Somber	Celebratory
	General	Specific		General	Specific
	Optional	Required		Optional	Required
	Re-occurring	Novel		Replenishment	Novelty
	Unprepared	Prepared		Unprepared	Prepared
	Unfamiliar	Familiar		Unfamiliar	Familiar
	Pleasant	Unpleasant		Available	Unavailable
				Pleasant	Unpleasant
Person	Self	Others			
	Family	Friend			
	Personal	Business			
	Close	Distant			
	Casual	Formal			
	Comfortable	Uncomfortable			
	Intimate	Public			
	Unfamiliar	Familiar			
	Pleasant	Unpleasant			
	Close	Distant			
Aggregate	Unfamiliar	Familiar		Unfamiliar	Familiar
	Comfortable	Uncomfortable		Comfortable	Uncomfortable
	Available	Unavailable		Available	Unavailable
	Immediate	Distant		Immediate	Distant

However, even from this representation of dimension, it is clear that a more accurate representation of an occasion can be drawn. This dimensional representation would also help ameliorate the problems in the categorical approach. Furthermore, the dimensional approach can provide an accurate reflection of salient product attributes as well. This would allow for the ability to better understand how the shopper frames an occasion. It is her framing which develops her occasion perception driving product targeting for the shopping experience. Furthermore, her occasion perception associated with these dimensions helps the shopper to develop an accurate evaluation set, allowing her adjust to the actual shopping environment. Finally, these dimensions may play a role in her determining her goals for the shopping experience through which she will assess value from the shopping experience.

Appendix F

Table 29 *Research Study Scales and Reliabilities*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Yoo, B., & Donthu, N. (2001). Developing and validating a multi-dimensional consumer-based brand equity scale. Journal of Business Research, 52(1), 1-14.	**Consumer Belief Profile 0.975**	Brand Belief Profile	0.898	I consider myself to be loyal to [Insert Brand]	0.722	18.755***
				[Insert Brand] would be my first choice	0.815	22.305***
				The likely quality of [Insert Brand] is extremely high	0.813	22.233***
				I can recognize [Insert Brand] among other competing brands	0.812	22.206***
				Some characteristics of [Insert Brand] come to my mind quickly	0.787	21.173***
				It makes sense to buy [Insert Brand] instead of any other brand, even if they are the same	0.670	16.979***
		Product Belief Profile	0.925	I consider myself to be loyal to [Insert Brand,Product]	0.759	20.375***
				[Insert Brand,Product] would be my first choice	0.819	22.817***
				The likely quality of [Insert Brand,Product] is extremely high	0.769	20.767***
				I can recognize [Insert Brand,Product] among other competing products	0.740	19.661***
				It makes sense to buy [Insert Brand,Product] instead of other products, even if the others are the same	0.818	22.772***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
		Product Belief Profile	0.925	Even if another product has the same features as [Insert Brand,Product], I would still prefer to buy [Insert Brand,Product]	0.875	25.337***
				If another product is not different from [Insert Brand,Product] in any way, it seems smarter to purchase [Insert Brand,Product]	0.799	21.975***
Yoo, B., & Donthu, N. (2001). Developing and validating a multi-dimensional consumer-based brand equity scale. Journal of Business Research, 52(1), 1-14.	**Consumer Belief Profile 0.975**	Retailer Belief Profile	0.876	I consider myself to be loyal to [Insert Store]	0.740	19.167***
				I can recognize [Insert Store] among other competing stores	0.818	22.137***
				I am aware of [Insert Store]	0.699	17.739***
				Some characteristics of [Insert Store] come to my mind quickly	0.779	20.581***
				I can quickly recall the symbol or logo of [Insert Store]	0.684	17.223***
				Even if another retailer has the same features as [Insert Store], I still prefer to shop with[Insert Store]	0.688	17.371***
		Store Location Belief Profile	0.924	I consider myself to be loyal to [Insert Store, Location]	0.790	21.680***
				It makes sense to shop at [Insert Store, Location] instead of another, even if they are the same	0.832	23.446***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
		Store Location Belief Profile	0.924	Even if another store location has the same features as [Insert Store, Location], I still prefer to shop at [Insert Store, Location]	0.937	28.525***
				If there is another store location as good as [Insert Store, Location], I still prefer to shop at [Insert Store, Location]	0.822	23.007***
				If another store location is not different from [Insert Store, Location] in any way, it seems smarter to shop at [Insert Store, Location]	0.827	23.215***
Kapferer, & Laurent (1993). Further evidence on the consumer involvement profile: five antecedents of involvement. Psychology and Marketing, 10(4), 347-355.	**Shopping Occasion Perception 0.988**	Product Importance	0.927	The salty snack I buy for [Insert Scenario] is extremely important to me	0.846	24.037***
				I am really very interested in the salty snack for [Insert Scenario]	0.924	27.818***
				I really enjoy buying the salty snack for [Insert Scenario]	0.849	24.207***
				[Insert Scenario] salty snacks are like giving a present	0.760	20.497***
				[Insert Scenario]salty snacks are a pleasure	0.849	24.191***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Zaich-kowsky, J. L. (1985). Measuring the involvement construct. Journal of Consumer Research, 341-352.	**Shopping Occasion Perception 0.988**	Occasion Importance	0.966	Unimportant/Important	0.914	27.654***
				Not Relevant/Relevant	0.886	26.227***
				Does not matter to me/Matters to me	0.906	27.244***
				Not Essential/Essential	0.917	27.804***
				Not Needed/Needed	0.904	27.158***
				Not Necessary/Necessary	0.918	27.869***
	Shopping Occasion Perception 0.988	Perceived Consumer Importance	0.976	Unimportant/Important	0.920	28.057***
				Boring/Intersting	0.916	27.865***
				Means Nothing/Means a Lot to Me	0.929	28.538***
				Unexciting/Exciting	0.924	28.305***
				Uninvolving/Involving	0.909	27.477***
				Mundane/Fascinating	0.885	26.260***
				Irrelevant/Relevant	0.919	27.985***
				Unappealing/Apealing	0.922	28.153***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Rizkalla, A. N. (1989). Sense of Time Urgency and Consumer Well-Being: Testing Alternative Causal Models. Advances in Consumer Research, 16, 180-188.	**Shopping Occasion Perception 0.988**	Perceived Occasion Urgency	0.854	I often feel that time spent shopping for the product for [Insert Scenario] is NOT wasted time	0.785	20.585***
				I get almost panicky when I don't have enough time to shop for the product for [Insert Scenario]	0.658	16.223***
				It does not upset me when I have to postpone things I had already planned so I can shop for the product for [Insert Scenario]	0.675	16.753***
				I would NOT put aside my shopping for the product for [Insert Scenario] and relax even when I feel like it	0.562	13.339***
				I feel guilty if I'm relaxing instead of shopping for the product for [Insert Scenario]	0.752	19.378***
				I seem to be more interested in [Insert Scenario] than most of my friends	0.774	20.163***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Operational-ized Perceived Setting Assessment Scale		Perceived Setting Assessment	0.912	Unpleasant/Pleasant	0.925	28.249***
				Strangers/Friends	0.880	25.922***
				Not Related/Related	0.804	22.513***
				Distant/Close	0.905	27.196***
				Not Comfortable/Comfortable	0.945	29.391***
				Unfamiliar/Familiar	0.894	26.606***
				Inappropriate/Appropriate	0.498	12.194***
				Drag On/Over Soon	0.214	4.946***
				Unpleasant/Pleasant	0.788	21.828***
				Exclusive/Open	0.310	7.261***
				Unfamiliar/Familiar	0.722	19.303***
				Private/Public	0.149	3.420***
				Uncomfortable/Comfortable	0.787	21.796***
				Distant/Immediate	0.156	3.598***
				Later/Now	0.125	2.863**
Operational-ized Product/ Service Assessment Scale		Product/ Service Assess	0.946	Private/Public	0.632	16.132***
				Not Flavorful/	0.864	25.093***
				Shame/Proud	0.814	22.839***
				Hand Made/Mass Produced	0.582	14.575***
				Unfamiliar/Familiar	0.873	25.524***
				Unavailable/Available	0.843	24.122***
				Unpleasant/Pleasant	0.876	25.666***
				Unbranded/Branded	0.787	21.731***
				Unreliable/Reliable	0.899	26.795***
				Limited Choice/Abundant Choice	0.755	20.45***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Guay, Vallerand, & Blanchard (2000). On the assessment of situational intrinsic and extrinsic motivation: The Situational Motivation Scale (SIMS). Motivation and Emotion, 24(3), 175-213.	**Shopper Purchase Need Assess 0.986**	Motivation	0.971	because I believe that [Insert Scenario] is an important occasion for me	0.922	28.180***
				of my own personal decision	0.775	21.407***
				because I think participating in [Insert Scenario] is good for me	0.899	26.966***
				because I am doing it for my own good	0.790	22.034***
				because I feel good about participating in [Insert Scenario]	0.941	29.211***
				because I think that [Insert Scenario] is interesting	0.938	29.062***
				because I think [Insert Scenario] is a pleasant occasion	0.956	30.125***
				because [Insert Scenario] is fun	0.950	29.737***
Rizzo, House, & Lirtzman (1970) Role conflict and ambiguity in complex or-ganizations. Admin-istrative Science Quarterly, 150-163.	**Shopper Purchase Need Assess 0.986**	Role	0.923	I feel certain about how much authority I have to prepare for [Insert Scenario]	0.855	24.346***
				I have clear goals and plans for [Insert Scenario]	0.882	25.616***
				I know that I have divided my time properly for [Insert Scenario]	0.859	24.542***
				I know what my responsibilities for [Insert Scenario] are	0.804	22.139***
				I feel certain how I will be evaluated for [Insert Scenario]	0.798	21.912***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Operational-ized Shopper Trip Subjective Norm Scale		Shopping Trip Subjective Norms	0.934	I am concerned about what others who are important to me at [Insert Scenario] would think of the product(s) I purchase for this occasion	0.780	21.279***
				I want to purchase for [Insert Scenario] what others important to me think I should buy	0.803	22.227***
				Most people who are important to me think this product is important to [Insert Scenario]	0.879	25.628***
				Others who are important to me think I should do a good job selecting product for [Insert Scenario]	0.776	21.129***
				Most people who are important to me think that the brand of salty snack is important for [Insert Scenario]	0.854	24.481***
				Most people whose opinions I value think it is important to have the salty snack for [Insert Scenario] come from a specific retailer (store name)	0.737	19.642***
				Most people whose opinions I value think that the flavor of the salty snack is important for [Insert Scenario]	0.824	23.128***
				Most people whose opinions I value think it is important to have the salty snack for [Insert Scenario] come from a specific store location	0.741	19.779***

Table 29 *Continued*

Original Scale and Author	Research Scale and Composite Reliability	Sub-Construct	Comp. Reliab.	Measure	Standard. Estimate	*t*-Value
Operationalized Shopper Purchase Solution Assessment	**Shopper Purchase Solution Assessment Scale 0.928**	Brand Assess	0.783	that the product be from [Insert Brand]	0.769	19.340***
				The BRAND of salty snack for the purchase required for [Insert Scenario] does NOT matter	0.328	7.185***
				I will only purchase products from [Insert Brand]	0.779	19.625***
				The Brand is the most important choice for the purchase required for [Insert Scenario]	0.823	21.002***
Operational-ized Shopper Purchase Solution Assessment	**Shopper Purchase Solution Assessment Scale 0.928**	Product Assess	0.71	that the product be[Insert Brand, Product]	0.777	17.329***
				The type of SALTY SNACK for the purchase required for [Insert Scenario] does NOT matter	0.242	5.158***
				I will only purchase [Insert Brand, Product]	0.840	18.630***
				The Product is the most important choice for the purchase required for [Insert Scenario]	0.536	12.109***
Operational-ized Shopper Purchase Solution Assessment	**Shopper Purchase Solution Assess Scale 0.928**	Retailer Assess	0.786	that the purchase come from any [Insert Store]	0.681	16.569***
				The STORE where the purchase required for [Insert Scenario] comes from does NOT matter	0.407	9.208***
				I will only purchase from [Insert Store]	0.735	18.108***
				The Store is the most important choice for the purchase required for [Insert Scenario]	0.902	23.126***

Table 29 *Continued*

Original Scale and Author	**Research Scale and Composite Reliability**	**Sub-Construct**	**Comp. Reliab.**	**Measure**	**Standard. Estimate**	***t*-Value**
Operational-ized Shopper Purchase Solution Assessment	**Shopper Purchase Solution Assessment Scale 0.928**	Location Assess	0.773	that the purchase come from [Insert Store, Location]	0.821	20.310***
				The specific store LOCATION for the purchase required for [Insert Scenario] does NOT matter	0.369	8.066***
				I will only purchase at [Insert Store, Location]	0.738	17.960***
				The Store Location is the most important choice for the purchase required for [Insert Scenario]	0.741	18.056***

**$p \leq .01$, ***$p \leq .001$

Appendix G

New Scales Development

Item development

As previously noted, shoppers and shopper value are infrequently studied. Therefore, in order to examine several areas unique to shopper value, new measurement scales will need to be developed. The area's which require new scales are largely related to occasion, defined in this research as a dimensional element (For a complete description please see Appendix F). This is different than the more standard finite element approach currently used in the literature. Scales related to subjective norms, product/service perception and shopper purchase solution assessment also require new scales. In total, four scales, plus sub-construct scales, will be developed to support this research. The need for scale development was made evident through the literature, therefore the research was specifically designed to use a sequential mixed-method approach. The design allows the qualitative study to inform the development of scales for use in the quantitative study.

The development of the occasion scales were initially influenced by those which exist in the extant literature (Belk, 1974; Hall & Lockshin, 2000). However, these scales left significant gaps related to many elements which have been stated to be important in the understanding of occasion. Therefore, new scales were developed using a semantic differential design to reflect dimensions of occasion such as; occasion product assessment, occasion duration, atmosphere perception, location perception, occurrence perception, and product/service perception. Beyond occasion, a set of new scales were

developed all using a summated rating design to reflect product purchase subjective norms, and shopper purchase solution assessment (brand, product, retailer, and location).

Semantic differential scale development, used for occasion and product/service perception measurement, began with items generated from information found in the literature. This was followed and enhanced by the use of key words or phrases pulled from the qualitative data. In all, a list of 110 word pairings was generated to represent occasion and product/service perception. The items were initially pooled, as many of the pairings could be reflective of a similar assessment but across differing occasion elements. Scale development requires a series of validity and reliability tests to be undertaken. These tests assess the sale items ability to measure the construct each scale was designed to measure (Osgood, Suci, & Tannenbaum, 1971). Research suggests that as a first test the items should be examined for face validity (Hardesty & Bearden, 2004). This assessment examines the scale items for suitability in representing their perspective scales. Experts were employed to examine face validity, which in this case included marketing department faculty members and committee members (Hardesty & Bearden, 2004).

The expert review for face validity assessed the items as representative and suitable to move forward. The next validity test is content validity which was assessed using a panel of five judges who are familiar with the topic and the content area (Kerlinger & Lee, 2000). The judges, over a series of five weeks, were given word pairings which were designed to measure a specific construct. In each case, a definition was provided to the judges describing the construct which the word pairings were

designed to measure. The judges then rated word pairs according to *reflective*, *somewhat reflective*, or *not reflective*. Items which were rated as reflective were retained. Items which were rated as not reflective were deleted. Items rated as somewhat reflective, were subject to further review examining nuances suggested by the judges. In subsequent re-evaluations, these items were reviewed using a dichotomous rating of *reflective* or *not reflective* only. Again, items rated not reflective were eliminated. The results of these examinations resulted in the following initial scales which can be seen in Table 29. Following the completion of the initial set of semantic differential scales, the summated rating scales associated with subjective norms and solution assessment were begun.

Again, returning to the qualitative research, key words and phrases were culled from the data which reflected shopper subjective norms associated with the purchase of the product need. Phrasing and terminology were examined related to purchase solutions assessments. Together the data were used to develop the subjective norms and four shopper purchase solution assessment Likert type scales. Following their selection, the same process used for the semantic differential scales was employed toward face and content validity for these summated rating scales. The resulting scales can be seen in Table 30 and Table 31.

With the scale items examined for both face and content validity using expert judges, a further examination of the scales was undertaken. To accomplish this, a pretest was undertaken using a convenience sample of 6 participants (Osgood, et al., 1971). Participants were asked to not only respond to the scale items but were also asked to express any comments regarding clarity or concern regarding the individual scale items.

Table 30 *Occasion and Product/Service Initial Semantic Differential Scales Items*

Occasion Product The following word pairs describe the PRODUCT you are to provide for this occasion. Please indicate your perception of the **PRODUCT** for each word pair.

Non-Fattening	Fattening
Unhealthy	Healthy
Private	Public
Youth	Adult
Unnatural	Natural
Not Specific	Specific
Inexpensive	Expensive
Not Flavorful	Flavorful
Shame	Pride
Unreliable	Reliable
Necessity	Luxury
Common	Exclusive
Hand Made	Mass Produced
Unimportant	Important
Casual	Formal
Private	Public
Somber	Celebratory
General	Specific
Optional	Required
Unprepared	Prepared
Unfamiliar	Familiar
Unavailable	Available
Unpleasant	Pleasant
Low Quality	High Quality
Unbranded	Branded
Unsophisticated	Sophisticated
Feminine	Masculine
Local	National
Limited Choice	Abundant Choice

Table 30 *Continued*

Occasion Perception

The following word pairs describe the **OCCASION** for which you are to provide a product.

Please indicate your perception of the OCCASION word pair:

Unimportant	Important
Of no concern	Of concern to me
Means Nothing	Means a lot to me
Irrelevant	Relevant
Useless	Useful
Not Beneficial	Beneficial
Does not Matter to Me	Matters to me
Optional	Required
Required	Significant
Trivial	Vital
Non-Essential	Essential
Not Needed	Needed
Unnecessary	Necessary

The following word pairs further describe this **OCCASION**. Please indicate your perception of this **OCCASION** for each word pair.

The time frame for when this occasion will occur is:

Immediate	Distant
Short	Long
Right Now	In the Future
Now	Later
Near	Far

The following word pairs further describe this **OCCASION**. Please indicate your perception of this **OCCASION** for each word pair.

The time frame for how long this occasion will last:

Short	Long
Fast	Slow
Appropriate	In-Appropriate
Over soon	Drag On
Quick	Lingering

Table 30 *Continued*

The following word pairs describe the aspects of the **ENVIRONMENT** for this occasion. Please indicate your perception of the **ENVIRONMENT** for this occasion for each word pair.

Casual	Formal
Exclusive	Open
Private	Public
Somber	Celebratory
Unpleasant	Pleasant
Self	Others
Strangers	Friends
Un-related	Related
Business	Personal
Distant	Close
Uncomfortable	Comfortable
Unfamiliar	Familiar

People

The following word pairs describe the **PERSON** who is the focus of this occasion.

Please indicate your perception this PERSON for each word pair:

Unimportant	Important
Boring	Interesting
Means Nothing	Means a lot to me
Unexciting	Exciting
Uninvolving	Involving
Mundane	Fascinating
Irrelevant	Relevant
Unappealing	Appealing

Table 30 *Continued*

Product/Service Perception

Based on your understanding from reading the scenario, please select the button for each word pair that BEST represents your ATTITUDE toward the PRODUCT required

Non-Fattening	Fattening
Unhealthy	Healthy
Private	Public
Youth	Adult
Unnatural	Natural
Not Specific	Specific
Inexpensive	Expensive
Not Flavorful	Flavorful
Shame	Proud
Unreasonably Priced	Reasonably Priced
Unreliable	Reliable
Necessity Item	Luxury Item
Common	Exclusive
Hand made	Mass produced
Unimportant	Important
Casual	Formal
Intimate	Public
Somber	Celebratory
General	Specific
Optional	Required
Replenishment	Novelty
Unprepared	Prepared
Unfamiliar	Familiar
Unavailable	Available
Unpleasant	Pleasant
Inexpensive	Expensive
Low Quality	High Quality
Low Class	High Class
Unbranded	Branded
Unsophisticated	Sophisticated
Feminine	Masculine
Local	National
Limited choices	Abundant choices

These comments were recorded and later reviewed to further refine the scale items for pre-testing.

The initial pre-test utilized a single scenario and was available on-line to undergraduate college students and faculty from retailing programs in universities across the U.S. A total of 57 participants responded to the survey, of which 15 were male, 42

Table 31 *Product Purchase Subjective Norms Likert Type Scales*

Product Subjective Norms The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	Strongly Disagree 1	Strongly Agree 7
I am concerned about what others who are important to me at [INSERT SHOPPING SITUATION TITLE] would think of the product(s) I purchase for this occasion.		
I want to purchase for [INSERT SHOPPING SITUATION TITLE] what others important to me think I should buy		
Most people who are important to me think this product is important to [INSERT SHOPPING SITUATION TITLE]		
Others who are important to me think I should do a good job selecting product for [INSERT SHOPPING SITUATION TITLE]		
Most people who are important to me think that the brand of salty snack is important for [INSERT SHOPPING SITUATION TITLE]		
Most people whose opinions I value think it is important to have the salty snack for [INSERT SHOPPING SITUATION TITLE] come from a specific retailer (store name)		
Most people whose opinions I value think that the flavor of the salty snack is important for [INSERT SHOPPING SITUATION TITLE]		
Most people whose opinions I value think it is important to have the salty snack for [INSERT SHOPPING SITUATION TITLE] come from a specific store location		

were female, with an average age of approximately 22. The scenario provided a manipulation resulting in a shopping alone social situation, a recipient and occasion which was unimportant which can be seen below:

> Please read the following brief description about an event you will participate in. Based on the information provided below think about how you would respond to the meeting and the shopping which will be required.
>
> **THE NEIGHBORHOOD NEWCOMERS MEETING**
>
> You are at home reviewing your calendar and you are surprised to find a note where you have agreed to provide a SALTY SNACK for a neighborhood newcomers meeting being held tomorrow. You have no interest in these meetings and usually do not attend. You also do not know anyone who does attend these meetings. At this point you check if you have a SALTY SNACK on hand, and unfortunately you do not. As you further review your calendar you also notice that the only time you have available to purchase a SALTY SNACK for this meeting is right now. So you head immediately out to purchase a SALTY SNACK. Remember to answer the questions based on your understanding of the information provided about THE MEETING. Please continue on to the questions of the following screen.

This represented one of the base scenario's which would be used in the full survey.

Factor analysis was used to examine each of the scales. Initially, principle component analysis (PCA) extraction with Eigen values > 1 using varimax rotation was used to identify item fit to construct. Items were reviewed for cross-loading when multiple factor solutions were presented. Further analysis in some cases led to items being eliminated, as they were ineffective in reflecting their designated construct (Kerlinger & Lee, 2000). The resulting scales were then examined using Kaiser-Meyer-Olkin (KMO) test, which assesses multi-collinearity among the items and should produce a score of 0.60 or greater (Kaiser, 1970). Additionally, the scales were examined using

Table 32 *Shopper Purchase Solution Assessment Likert Type Scales*

Shopper Brand Assessment The following statements describe the **BRAND** for this occasion. Please indicate your level agreement with each statement. My favorite Salty Snack Brand/Any Salty Snack Brand The Brand of Salty Snack does not matter for the purchase required for THE MEETING. Brand is the most important choice for for the purchase required for THE MEETING.	Strongly Disagree 1	Strongly Agree 7
Shopper Product Assessment The following statements describe the **PRODUCT** for this occasion. Please indicate your level agreement with each statement. My favorite Salty Snack /Any Salty Snack The type of Salty Snack does not matter for the purchase required for THE MEETING. Product is the most important choice for for the purchase required for THE MEETING.	Strongly Disagree 1	Strongly Agree 7
Shopper Retailer Assessment The following statements describe the **RETAILER** for this occasion. Please indicate your level agreement with each statement. My favorite Retailer/Any Retailer Retailer does not matter for the purchase required for THE MEETING. Retailer is the most important choice for for the purchase required for THE MEETING.	Strongly Disagree 1	Strongly Agree 7
Shopper Store Assessment The following statements describe the **STORE LOCATION** for this occasion. Please indicate your level agreement with each statement. My favorite Shopping Location/Any Shopping Location Shopping Location does not matter for the purchase required for THE MEETING. Shopping Location is the most important choice for for the purchase required for THE MEETING.	Strongly Disagree 1	Strongly Agree 7

Bartlett's test for sphericity which indicates the items exhibit equal variances (homoscedasticity) when significant or ($p < 0.000$) (Glaser, 1976). A recap of the scale purification follows and the factor analysis recap of the refined semantic differential scales can be found in Table 32, and the Likert type scales in Tables 33 and 34.

The semantic differential scales were analyzed and required further editing. Occasion Perception scale items were reduced by six items due to cross loading or poor factor loadings reducing the number of items in the scale to six. Occasion duration perception was reduced by one due to cross loading reducing the scale items to four. Occasion location perception was reduced by two items for poor factor loading leaving five remaining scale items, and occasion occurrence perception was reduced by one due to poor factor loading leaving four scale items. Occasion product assessment was reduced by twenty three items due to cross loading or poor factor loadings reducing the number of items to five. Product/ service perception was reduced by twenty three due to cross loading or poor factor loadings reducing the number of items to ten. As a result all of the remaining items loaded onto a single factor representing the desired construct.

For the Likert type scales, the same analysis found the subjective norms measures to be adequate in both pre-test one and pre-test two. The resulting scale items for subjective norms were examined using KMO, with all scores in excess of the cut-off of 0.60, and Bartlett's test were significant or ($p < 0.000$). However, a review of the results for the shopper solution assessment scale items reveals that in pre-test one, the

Table 33 *Semantic Differential Scale Refined Factor Analysis*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
Pre-Test 1	**Occasion Perception**	62.35%	0.820	185.483***
Pre-Test 2	The following word pairs describe the **OCCASION** for which you are to provide a product.	79.862	0.891	358.867***
		Factor Load PT 1	Factor Load PT 2	
General	Specific	0.741	0.907	
Spontaneous	Planned	0.791	0.865	
Available	Unavailable	0.596	0.814	
Pleasant	Unpleasant	0.796	0.924	
Low Quality	High Quality	0.913	0.910	
Pleasant	Unpleasant	0.862	0.936	
Pre-Test 1	**Occasion Duration Perception**	67.37%	0.726	101.505***
Pre-Test 2	The following word pairs describe the **DURATION** of the **OCCASION** for which you are to provide a product.	62.54%	0.709	97.417***
		Factor Load PT 1	Factor Load PT 2	
Short	Long	0.707	0.902	
Quick	Lingering	0.869	0.859	
Appropriate	In-appropriate	0.845	0.429	
Soon	Drag-on	0.852	0.876	
Pre-Test 1	**Occasion Location Perception**	66.97%	0.775	174.618***
Pre-Test 2	The following word pairs describe the **LOCATION** of the **OCCASION** for which you are to provide a product.	81.40%	0.678	145.290***
		Factor Load PT 1	Factor Load PT 2	
Unpleasant	Pleasant	0.851	0.870	
Exclusive	Open	0.759	0.646	
Unfamiliar	Familiar	0.883	0.800	
Private	Public	0.759	0.743	
Uncomfortable	Comfortable	0.832	0.847	

Table 33 *Continued*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
Pre-Test 1	**Occasion Occurrence Perception**	68.34%	0.713	115.807***
Pre-Test 2	The following word pairs describe **WHEN** the **OCCASION** for which you are to provide a product will **OCCUR**.	68.51%	0.680	122.286***
		Factor Load PT 1	Factor Load PT 2	
Immediate	Distant	0.701	0.896	
Short	Long	0.768	0.651	
Right Now	In the Future	0.941	0.889	
Now	Later	0.875	0.851	
Pre-Test 1	**Product/Service Perception**	61.88%	0.791	232.043***
Pre-Test 2	The following word pairs describe the **OCCASION** PRODUCT which you are to provide.	79.17%	0.919	544.784***
		Factor Load PT 1	Factor Load PT 2	
Private	Public	0.733	0.748	
Not Flavorful	Flavorful	0.888	0.893	
Shame	Pride	0.864	0.884	
Handmade	Mass Produced	0.836	0.843	
Unfamiliar	Familiar	0.889	0.887	
Unavailable	Available	0.924	0.916	
Unpleasant	Pleasant	0.867	0.877	
Unbranded	Branded	0.838	0.849	
Unreliable	Reliable	0.899	0.907	
Limited Choice	Abundant Choice	0.744	0.745	
Pre-Test 1	**Occasion Product Assessment**	61.85%	0.785	143.836***
Pre-Test 2	The following word pairs describe the **OCCASION** PRODUCT which you are to provide.	72.87%	0.843	220.535***
		Factor Load PT 1	Factor Load PT 2	
Unimportant	Important	0.893	0.899	
Boring	Interesting	0.903	0.927	
Means nothing	Means a lot to me	0.897	0.910	
Uninvolving	Involving	0.749	0.688	
Irrelevant	Relevant	0.816	0.822	

***$p < 0.000$

Table 34 *Likert Type Scale Subjective Norm Refined Factor Analysis*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
Pre-Test 1	**Product Subjective Norms**	67.765	0.893	358.351***
Pre-Test 2	The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	65.654	0.851	353.511***
		Factor Load 1	Factor Load 2	
	I am concerned about what others who are important to me at [INSERT SHOPPING SITUATION TITLE] would think of the product(s) I purchase for this occasion.	.817	0.845	
	I want to purchase for [INSERT SHOPPING SITUATION TITLE] what others important to me think I should buy	.716	0.818	
	Most people who are important to me think this product is important to [INSERT SHOPPING SITUATION TITLE]	.885	0.867	
	Others who are important to me think I should do a good job selecting product for [INSERT SHOPPING SITUATION TITLE]	.838	0.718	
	Most people who are important to me think that the brand of salty snack is important for [INSERT SHOPPING SITUATION TITLE]	.905	0.840	
	Most people whose opinions I value think it is important to have the salty snack for [INSERT SHOPPING SITUATION TITLE] come from a specific retailer (store name)	.842	0.766	
	Most people whose opinions I value think that the flavor of the salty snack is important for [INSERT SHOPPING SITUATION TITLE]	.737	0.821	
	Most people whose opinions I value think it is important to have the salty snack for [INSERT SHOPPING SITUATION TITLE] come from a specific store location	.826	0.797	

*** $p < 0.000$

Table 35 *Likert Type Shopper Solution Assessment Refined Factor Analysis*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
Pre-Test 1	**Shopper Brand Assessment** The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	52.47%	0.613	12.407**
		Factor Load 1		
	My favorite Salty Snack Brand/Any Salty Snack Brand	-0.709		
	The Brand of Salty Snack does not matter for the purchase required for THE MEETING.	0.696		
	Brand is the most important choice for for the purchase required for THE MEETING.	0.767		
Pre-Test 1	**Shopper Retailer Assessment** The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	51.76%	0.570	12.843**
		Factor Load 1		
	My favorite Retailer/Any Retailer	-0.807		
	Retailer does not matter for the purchase required for THE MEETING.	0.639		
	Retailer is the most important choice for for the purchase required for THE MEETING.	0.703		
Pre-Test 1	**Shopper Store Location Assessment** The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	74.14%	0.482	2.625
		Factor Load 1		
	My favorite Shopping Location/Any Shopping Location	0.963		
	Shopping Location does not matter for the purchase required for THE MEETING.	0.790		
	Shopping Location is the most important choice for for the purchase required for THE MEETING.	0.760		
Pre-Test 1	**Shopper Product Assessment** The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	39.79%	0.504	1.974

Table 35 *Continued*

Scale Items		% Vari.	KMO	Bartletts Chi Sq
		Factor Load 1		
	My favorite Salty Snack /Any Salty Snack	0.745		
	The type of Salty Snack does not matter for the purchase required for THE MEETING.	-0.762		
	Product is the most important choice for for the purchase required for THE MEETING.	0.239		
Pre-Test 2	**Shopper Brand Assessment**	58.303	0.7	77.221***
	The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	Factor Load 1	Factor Load 2	
	The MOST important part of purchasing product(s) for [INSERT SHOPPING SITUATION TITLE] is...A. that the product be from [INSERT BRAND FROM Q2 IN BOLD FONT]		0.876	
	The BRAND of salty snack for the purchase required for [INSERT SHOPPING SITUATION TITLE] does not matter		0.296	
	When purchasing product(s) for [INSERT SHOPPING SITUATION TITLE]...I will only purchase products from [INSERT BRAND FROM Q2 IN BOLD FONT]		0.886	
	Brand is the most important choice for the purchase required for [INSERT SHOPPING SITUATION TITLE]		0.832	
Pre-Test 2	**Shopper Retailer Assessment**	80.71	0.693	62.231***
	The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement	Factor Load 1	Factor Load 2	
	The MOST important part of purchasing product(s) for [INSERT SHOPPING SITUATION TITLE] is...that the purchase come from any [INSERT STORE FROM Q6 IN BOLD FONT]		0.865	

Table 35 *Continued*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
			0.974	
	The STORE where the purchase required for [INSERT SHOPPING SITUATION TITLE] comes from does NOT matter			
			0.865	
	When purchasing product(s) for [INSERT SHOPPING SITUATION TITLE]...I will only purchase from [INSERT STORE FROM Q6 IN BOLD FONT]			
	Retailer is the most important choice for the purchase required for [INSERT SHOPPING SITUATION TITLE]		0.827	
Pre-Test 2	**Shopper Store Assessment**	75.42	0.599	40.846***
	The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement			
		Factor Load 1	Factor Load 2	
			0.801	
	The MOST important part of purchasing product(s) for [INSERT SHOPPING SITUATION TITLE] is...that the purchase come from [INSERT STORE FROM Q6 IN BOLD FONT] [INSERT LOCATION FROM Q8 IN BOLD FONT]			
			0.972	
	The specific store LOCATION for the purchase required for [INSERT SHOPPING SITUATION TITLE] does not matter			
			0.773	
	When purchasing product(s) for [INSERT SHOPPING SITUATION TITLE]...I will only purchase at [INSERT STORE FROM Q6 IN BOLD FONT] [INSERT LOCATION FROM Q8 IN BOLD FONT]			
	Shopping Location is the most important choice for the purchase required for [INSERT SHOPPING SITUATION TITLE]		0.813	
Pre-Test 2	**Shopper Product Assessment**	77.317	0.607	50.890***
	The following statements relate to the PRODUCT for this occasion. Please indicate your level of agreement with each statement			

Table 35 *Continued*

Scale Items	Scale	% Vari.	KMO	Bartletts Chi Sq
			0.873	
	The MOST important part of purchasing product(s) for [INSERT SHOPPING SITUATION TITLE] is...that the product be [INSERT BRAND FROM Q2 IN BOLD FONT] [INSERT PRODUCT FROM Q4 IN BOLD FONT]			
	The type of SALTY SNACK for the purchase required for [INSERT SHOPPING SITUATION TITLE] does not matter		0.965	
	When purchasing product(s) for [INSERT SHOPPING SITUATION TITLE]...I will only purchase [INSERT BRAND FROM Q2 IN BOLD FONT] [INSERT PRODUCT FROM Q4 IN BOLD FONT]		0.897	
	Product is the most important choice for the purchase required for [INSERT SHOPPING SITUATION TITLE]		0.681	

$^{**}p < 0.01$ $^{***}p < 0.000$

measures failed to demonstrate the same consistency. As can be seen in Table 35, several items fail to reach the desired KMO cut-off of 0.60 and Barlett's fails to reach $p < 0.000$. Therefore, the scales were re-evaluated and formatted to more adequately represent the shopper's purchase solution assessment. A second pre-test was then undertaken. The result of this second pre-test was a satisfactory solution for shopper purchase solution scales items with all items achieving a KMO in excess of 0.60 and Bartlett's with $p <$ 0.000

In the first pre-test as with the factor analysis, the shopper solution assessment scales failed to reach acceptable levels of internal reliability. The range of Cronbach's

Table 36 *Scale Reliability Pre-test one and Pre-test two*

Constructs	Cron. Alpha	Min 1 - Max 7		Cron. Alpha	Min 1 - Max 7	
	Pre-Test I	Mean	Std. Dev	Pre-Test II	Mean	Std. Dev
Occasion Product Perception	0.863	52.09	10.018	0.944	54.92	11.497
Item Range		1.77-5.39	1.225-1.540		5.10-5.72	1.250-1.548
Occasion Atmosphere Perception	0.887	22.096	6.231	0.949	28.65	9.623
Item Range		4.14-4.68	1.266-1.591		4.35-5.08	1.672-1.951
Occasion Duration Perception	0.836	15.88	5.004	0.778	17.15	4.36
Item Range		3.86-4.19	1.432-1.629		3.23-4.70	1.319-1.640
Occasion Location Perception	0.876	22.93	6.554	0.794	22.70	6.22
Item Range		4.28-4.89	1.479-1.704		3.70-4.98	1.551-1.849
Occurance Perception	0.828	13.02	4.669	0.841	15.55	5.01
Item Range		2.89-3.53	1.460-1.465		3.62-4.20	1.493-1.552
Subjective Norms	0.931	33.91	9.877	0.925	38.75	11.564
Item Range		4.00-4.49	1.387-1.690		4.27-5.38	1.585-1.916
Brand Assessment	-0.367	11.32	2.308	0.841	17.33	5.47
Item Range		3.23-4.16	1.347-1.604		3.70-4.73	1.755-1.951
Product Assessment	-0.259	11.65	2.223	0.755	14.23	4.389
Item Range		2.98-4.86	1.301-1.445		4.35-5.07	1.726-1.858
Retailer Assessment	-0.105	11.18	2.571	0.816	12.40	4.26
Item Range		2.98-4.60	1.450-1.631		3.73-4.50	1.582-1.712
Location Assessment	0.144	10.51	2.693	0.721	12.45	4.30
Item Range		3.05-3.73	1.421-1.608		3.92-4.40	1.712-1.889
Product/Service	.845	49.18	8.30	0.944	54.92	11.497
Item Range		3.18-5.54	.649-1.638		5.10-5.75	1.250-1.582

alpha was from $\alpha > -0.104$ to -0.367, falling well below the threshold of 0.70 (Churchill, 1979; Nunnally & Bernstein, 1994). However, with the inclusion of the revised shopper purchase solution assessment scales in pre-test two, all scales met the requirements to adequately reflect internal reliability. The scale means ranged from 12.40 – 54.92; SD from 4.26 -11.564. Scale measures on an individual basis ranged from 1.77 to 5.72; standard deviations ranged from 1.250 to 1.951.

As a result, the proprietary scales all meet the required threshold to adequately measure the desired construct and reflect acceptable internal reliability. The new scales, having been sufficiently tested and demonstrating their appropriateness for use in further study, the final study is undertaken. The results for all scale results can be found in Chapter Four, Section Two.

Appendix H

Regression and ANOVA Tables

Table 37 *Regression Analysis By Scenario*

Scenario-Manipulation (IV-Conusmer Belief Profile)

	Brand Importance DV				Product Importance DV				Retailer Importance DV				Location Importance DV			
	Adj. R^2	Un Std. Beta	t	Sig.	Adj. R^2	Un Std. Beta	t	Sig.	Adj. R^2	Un Std. Beta	t	Sig.	Adj. R^2	Un Std. Beta	t	Sig.
1	0.045	2.266	1.776	0.080	0.045	1.874	1.425	0.159	0.082	2.987	1.608	0.113	0.096	1.473	1.777	0.080
2	0.331	0.304	2.790	0.781	0.366	0.425	0.324	0.747	0.075	1.962	1.109	0.272	0.090	1.802	1.861	0.068
3	0.076	4.327	3.612	0.001	0.027	4.662	3.993	0.000	0.229	5.032	3.975	0.000	0.114	1.341	1.629	0.109
4	0.078	2.717	2.684	0.009	0.153	2.144	2.006	0.050	0.287	1.904	1.591	0.117	0.115	1.476	1.797	0.077
5	0.035	0.751	0.543	0.589	-0.018	2.102	1.583	0.118	0.271	1.973	1.655	0.103	0.155	1.598	2.670	0.011
6	0.204	2.343	1.975	0.053	0.153	1.151	0.750	0.456	0.191	2.555	1.541	0.129	0.180	0.248	0.246	0.807
7	0.062	3.871	3.919	0.000	0.092	3.968	4.265	0.000	0.070	2.754	2.321	0.024	0.122	1.536	2.140	0.036
8	0.068	1.594	0.893	0.375	0.044	2.234	1.289	0.202	0.202	3.473	1.808	0.075	0.134	1.257	1.489	0.141

Significant Effect of IV on Importance

	Scenario Impact Review
1	No Significant impact on all Brand, Product, Retailer, and Location
2	No Significant impact on all but the selection of Retailer
3	Significant impact was on Brand, Product and Retailer
4	Significant impact on Brand, Product
5	Only significant impact was on Location
6	No Significant impact on Brand, Product, Retailer, and Location
7	Significant impact on Brand, Product, Retailer, and Location
8	No Significant impact on all Brand, Product, Retailer, and Location

Table 38 *ANOVA Analysis by Scenario*

Scenario-Manipulation									
Brand Loyalty-Independent Variable		1 UnOcc_UnRec	2 UnOcc_IMpRec	3 ImpOcc_UnRec	4 ImpOcc_ImpRec	5 UnOcc_UnRec_UnSupp	6 UnOcc_IMpRec_SuSupp	7 ImpOcc_UnRec_UnSupp	8 ImpOcc_ImpRec_UnSupp
Brand Importance Dependent Variable (DV)	DV Mean Low	3.688	4.172	4.205	4.207	3.663	3.632	3.813	4.100
	Std. Dev	1.249	1.056	1.577	1.300	1.415	1.116	1.260	1.030
	DV Mean High	4.580	5.700	5.533	4.774	4.375	4.956	4.875	5.113
	Std. Dev	1.695	0.814	1.404	1.301	1.674	1.140	1.092	1.659
	df	44	29	41	42	36	34	40	33
	t-value	2.017**	4.529**	2.830**	1.445	1.409	3.515**	2.919**	2.218**
Product Loyalty-Independent Variable									
Product Importance Dependent Variable (DV)	DV Mean Low	3.726	4.177	4.396	4.105	3.700	4.080	3.990	4.420
	Std. Dev	1.151	1.077	1.287	0.891	1.171	0.953	1.274	1.076
	DV Mean High	4.674	5.671	5.139	5.302	4.472	5.125	5.068	5.000
	Std. Dev	1.744	1.011	1.375	1.118	1.650	1.295	0.969	1.554
	df	42	41	40	41	45	44	35	40
	t -value	2.144**	4.676****	1.781*	3.906***	1.876*	2.947***	2.804***	1.392
Retailer Loyalty-Independent Variable									
Retailer Importance Dependent Variable (DV)	DV Mean Low	3.556	3.703	3.438	3.109	3.146	3.440	3.521	3.670
	Std. Dev	1.126	0.984	1.699	1.231	1.304	1.167	1.242	1.427
	DV Mean High	4.250	4.452	4.738	4.891	4.573	4.700	4.185	4.479
	Std. Dev	1.719	1.572	1.510	1.668	1.254	1.370	1.134	1.509
	df	37	40	42	37	46	38	45	47
	t-value	1.511*	1.899*	2.686**	3.638****	3.864****	2.974***	1.915*	1.927*
Location Loyalty-Independent Variable									
Location Importance Dependent Variable (DV)	DV Mean Low	3.260	3.554	3.458	3.241	3.100	3.241	3.208	3.344
	Std. Dev	1.174	1.208	1.905	1.268	1.335	1.073	0.884	1.373
	DV Mean High	4.222	4.696	4.817	4.500	4.375	4.514	4.284	4.390
	Std. Dev	1.473	1.615	1.297	1.807	1.292	1.642	1.389	1.649
	df	49	44	37	44	47	43	44	47
	t-value	2.591**	2.714***	2.647**	2.576**	3.398***	2.903***	3.102***	2.417**

*$p \leq 0.10$, **$p \leq 0.05$, ***$p \leq 0.01$, ****$p \leq 0.001$

Table 39 *ANOVA Analysis by Importance*

Brand Loyalty-Independent Variable		Scenario-Manipulation 1 Un-Import	2 Import	3 UnOcc_ ImpRec	4 ImpOcc_Un Rec
Brand Importance Dependent Variable (DV)	DV Mean Lo	3.760	4.164	3.862	3.879
	Std. Dev	1.270	1.187	1.380	1.107
	DV Mean Hi	4.480	4.904	5.095	5.174
	Std. Dev	1.729	1.408	1.265	1.062
	df	97	88	78	79
	t-value	2.357**	2.696***	4.153****	5.309****
Product Loyalty-Independent Variable					
Product Importance Dependent Variable (DV)	DV Mean Lo	5.131	5.269	4.714	5.238
	Std. Dev	0.809	0.738	1.096	0.541
	DV Mean Hi	6.953	7.000	6.961	7.000
	Std. Dev	0.091	0.000	0.065	0.000
	df	94	84	70	71
	t -value	15.816****	15.202****	11.574****	19.540****
Retailer Loyalty-Independent Variable					
Retailer Importance Dependent Variable (DV)	DV Mean Lo	5.012	5.351	5.316	5.059
	Std. Dev	0.695	0.841	1.091	0.597
	DV Mean Hi	6.896	6.883	6.949	6.858
	Std. Dev	0.139	0.148	0.078	0.158
	df	85	103	95	77
	t-value	17.255****	12.464****	10.343****	16.405****
Location Loyalty-Independent Variable					
Location Importance Dependent Variable (DV)	DV Mean Lo	3.933	4.342	4.205	4.538
	Std. Dev	0.942	1.165	1.126	0.720
	DV Mean Hi	6.796	6.945	6.861	6.829
	Std. Dev	0.242	0.090	0.169	0.222
	df	94	90	90	91
	t-value	19.820****	14.940****	15.321****	20.465****

*$p \leq 0.10$, **$p \leq 0.05$, ***$p \leq 0.01$, ****$p \leq 0.001$

Table 40 *ANOVA Analysis by Social Shopping Situation*

Scenario-Manipulation			
Brand Loyalty-Independent Variable		1 Alone	2 With Un-Supp
Brand Importance Dependent Variable (DV)	DV Mean Lo	5.053	5.105
	Std. Dev	0.739	0.733
	DV Mean Hi	6.891	6.873
	Std. Dev	0.131	0.140
	df	94	84
	t-value	17.758****	14.088****
Product Loyalty-Independent Variable			
Product Importance Dependent Variable (DV)	DV Mean Lo	5.160	5.235
	Std. Dev	0.801	0.754
	DV Mean Hi	6.975	6.970
	Std. Dev	0.055	0.059
	df	94	92
	t -value	15.980****	14.880****
Retailer Loyalty-Independent Variable			
Retailer Importance Dependent Variable (DV)	DV Mean Lo	5.029	4.959
	Std. Dev	0.844	0.716
	DV Mean Hi	6.981	6.951
	Std. Dev	0.054	0.077
	df	67	76
	t-value	13.451****	16.829****
Location Loyalty-Independent Variable			
Location Importance Dependent Variable (DV)	DV Mean Lo	4.164	4.204
	Std. Dev	1.097	1.043
	DV Mean Hi	6.888	6.900
	Std. Dev	0.152	0.151
	df	92	95
	t-value	16.343****	18.256****

*p ≤0.10, **p≤0.05, ***p≤0.01, ****p≤0.001

APPENDIX I

Regression and ANOVA Results Review

Table 41 *Between Group ANOVA by Shopping Purchase Solution Assessment*

Brand Loyalty ANOVA by Scenario

Brand Importance	Sum of Squares	df	Mean Square	F	Sig.
BIC_Gp1	9.134	1	9.134	4.177	.047
BIC_Gp2	18.079	1	18.079	20.173	.000
BIC_Gp3	17.225	1	17.225	7.454	.009
BIC_Gp4	3.533	1	3.533	2.088	.156
BIC_Gp5	4.809	1	4.809	2.020	.164
BIC_Gp6	15.735	1	15.735	12.384	.001
BIC_Gp7	11.612	1	11.612	8.175	.007
BIC_Gp8	8.787	1	8.787	4.318	.046

Tukey HSD Multiple Comparisons

Dependent Variable by Scenario	(I) BLC_HIMed Lo	(J) BLC_HIMed Lo	Mean Difference (I-J)	Std. Error	Sig.	Interval Lower Bound	Interval Upper Bound
BIC_Gp1	1LO	3HI	-.89205	.39406	.068	-1.8363	.0522
BIC_Gp2	1LO	3HI	-1.52813	.42630	.002	-2.5510	-.5052
BIC_Gp3	1LO	3HI	-1.32798	.43386	.009	-2.3702	-.2858
BIC_Gp4	1LO	3HI	-.56729	.38646	.313	-1.4949	.3603
BIC_Gp5	1LO	3HI	-.71250	.49456	.326	-1.8975	.4725
BIC_Gp6	1LO	3HI	-1.32430	.34521	.001	-2.1532	-.4954
BIC_Gp7	1LO	3HI	-1.06250	.37725	.017	-1.9677	-.1573
BIC_Gp8	1LO	3HI	-1.01250	.45210	.072	-2.0958	.0708

Product Loyalty ANOVA by Scenario

Product Importance	Sum of Squares	df	Mean Square	F	Sig.
PIC_Gp1	9.861	2	4.930	2.682	.076
PIC_Gp2	24.131	2	12.066	11.590	.000
PIC_Gp3	5.680	2	2.840	1.697	.192
PIC_Gp4	15.257	2	7.628	6.618	.002
PIC_Gp5	6.854	2	3.427	1.743	.183
PIC_Gp6	12.036	2	6.018	4.932	.010
PIC_Gp7	13.946	2	6.973	5.812	.005
PIC_Gp8	7.266	2	3.633	2.690	.075

Tukey HSD Multiple Comparisons

Dependent Variable by Scenario	(I) BLC_HIMed Lo	(J) BLC_HIMed Lo	Mean Difference (I-J)	Std. Error	Sig.	Interval Lower Bound	Interval Upper Bound
PIC_Gp1	1LO	3HI	-.94772	.40923	.060	-1.9283	.0328
PIC_Gp2	1LO	3HI	-1.49397	.31332	.000	-2.2458	-.7422
PIC_Gp3	1LO	3HI	-.74306	.40339	.165	-1.7121	.2260
PIC_Gp4	1LO	3HI	-1.19682	.32969	.002	-1.9882	-.4055
PIC_Gp5	1LO	3HI	-.77222	.41371	.156	-1.7635	.2191
PIC_Gp6	1LO	3HI	-1.04464	.33370	.007	-1.8459	-.2433
PIC_Gp7	1LO	3HI	-1.07780	.39396	.022	-2.0231	-.1325
PIC_Gp8	1LO	3HI	-.57955	.35904	.247	-1.4398	.2807

Retailer Loyalty ANOVA by Scenario

Retailer Importance	Sum of Squares	df	Mean Square	F	Sig.
RIC_Gp1	5.692	2	2.846	1.526	.226
RIC_Gp2	10.933	2	5.467	3.132	.053
RIC_Gp3	18.445	2	9.222	3.956	.025
RIC_Gp4	33.389	2	16.695	8.887	.000
RIC_Gp5	25.106	2	12.553	7.374	.001
RIC_Gp6	15.629	2	7.815	5.164	.008
RIC_Gp7	5.330	2	2.665	1.846	.167
RIC_Gp8	8.699	2	4.350	2.110	.129

Tukey HSD Multiple Comparisons

Dependent Variable	(I) LIC_HIMed Lo	(J) LIC_HIMed Lo	Mean Difference (I-J)	Std. Error	Sig.	Interval Lower Bound	Interval Upper Bound
RIC_Gp1	1LO	3HI	-.76389	.45524	.222	-1.8579	.3301
RIC_Gp2	1LO	3HI	-1.18021	.47481	.043	-2.3301	-.0303
RIC_Gp3	1LO	3HI	-1.30000	.46227	.018	-2.4135	-.1865
RIC_Gp4	1LO	3HI	-1.81777	.43838	.000	-2.8700	-.7655
RIC_Gp5	1LO	3HI	-1.42708	.37666	.001	-2.3296	-.5246
RIC_Gp6	1LO	3HI	-1.26000	.40176	.007	-2.2251	-.2949
RIC_Gp7	1LO	3HI	-.66395	.35062	.149	-1.5062	.1783
RIC_Gp8	1LO	3HI	-.80917	.41030	.127	-1.7933	.1749

Location Loyalty ANOVA by Scenario

Location Importance	Sum of Squares	df	Mean Square	F	Sig.
LIC_Gp1	11.919	2	5.959	3.562	.034
LIC_Gp2	17.138	2	8.569	4.819	.011
LIC_Gp3	18.306	2	9.153	3.688	.031
LIC_Gp4	18.017	2	9.009	4.150	.020
LIC_Gp5	20.709	2	10.355	6.725	.002
LIC_Gp6	24.535	2	12.267	7.983	.001
LIC_Gp7	13.405	2	6.702	4.665	.013
LIC_Gp8	21.130	2	10.565	5.266	.007

Tukey HSD Multiple Comparisons

Dependent Variable by Scenario	(I) BLC_HIMed Lo	(J) BLC_HIMed Lo	Mean Difference (I-J)	Std. Error	Sig.	Interval Lower Bound	Interval Upper Bound
LIC_Gp1	1LO	3HI	-.96181	.36286	.027	-1.8313	-.0924
LIC_Gp2	1LO	3HI	-1.14130	.39321	.014	-2.0848	-.1978
LIC_Gp3	1LO	3HI	-1.35833	.51850	.029	-2.6039	-.1128
LIC_Gp4	1LO	3HI	-1.25893	.44512	.017	-2.3274	-.1905
LIC_Gp5	1LO	3HI	-1.27500	.35461	.002	-2.1247	-.4253
LIC_Gp6	1LO	3HI	-1.27315	.37722	.004	-2.1789	-.3674
LIC_Gp7	1LO	3HI	-1.07576	.35379	.009	-1.9246	-.2269
LIC_Gp8	1LO	3HI	-1.04625	.40478	.032	-2.0161	-.0764

VITA

Robert Paul Jones received his Bachelor of Science in Retailing at the Michigan State University. Robert holds a Masters of Science in Retailing from the University of Tennessee, Knoxville. Subsequent to receiving his Masters degree Robert held many positions in the retail industry prior to returning to graduate school to complete his Ph.D. He was most recently employed as the Vice President of Merchandise Planning as Shop at Home Network and Vice President of Merchandise at Jewelry Television.

Robert's research interest involves brands and retail with a particular focus on shopper behavior His work has been presented at annual conferences both academic and professional including, the American Collegiate Retailing Association, and Global Shop. He has published research in the Journal of Retailing and Consumer Services and the Journal of Marketing at Retail, as well as a case study in Retailing Management. Robert has been an invited presenter for the National Association of College Stores, and National Association of Category Management.

Robert was the recipient of the Ida A. Anders Scholarship Award (2010-2011). Robert is an active member of the American Marketing Association and American Collegiate Retailing Association.

In May 2012, Robert completed the requirements for the Ph.D. degree in Retailing with a minor in Marketing at the University of Tennessee, Knoxville. He is presently employed as an Assistant Professor of Marketing at the University of Texas, Tyler.