

**The dynamics of consumer behaviour to beverage consumption in a harsh  
economic environment  
*A Case Study Of Zimbabwe***

**By**

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**CONFIDENTIALITY CLAUSE**

**15 September 2003**

**TO WHOM IT MAY CONCERN**

**RE: CONFIDENTIALITY CLAUSE**

Due to the strategic importance of this research it would be appreciated if the contents remain confidential and not be circulated for a period of five years.

Sincerely,





**L.T. MARUMAHOKO**

096334

**DECLARATION**

This research has not been previously accepted for any degree and is not being currently submitted in candidature for any degree.

Signed.....

Date.....

## ABSTRACT

Living Standards Measures (LSMs) are a way of segmenting or classifying the adult population of a country based on access to and use of a wide range of goods and services. LSMs are a very strong tool for grouping people for the purposes of target marketing rather than demographic segmentation. In any country with third world characteristics where a large portion of the economy is informal rather than formal, understanding consumer behaviour for the purpose of targeting consumers effectively becomes a formidable challenge.

A research has been conducted, centered on LSM3-10 consumer behaviour with regard to purchase and consumption of non-alcoholic beverages in Zimbabwe. Beverage consumption patterns are revolving since Zimbabwe started experiencing an economic downturn from 1992 and subsequently went into recession. Beverage consumption patterns continue to change as the economic climate changes, and hence, the need to understand consumer beverage consumption patterns to Zimbabwe's changing harsh economic conditions.

A hypothesis has been put to test, that is, "LSM3 to LSM10 will maintain their beverage consumption irrespective of the country's economic conditions". The methodology used in this survey is quantitative and descriptive with use of observation data, desk research and a survey instrument, the questionnaire which was designed for the purpose of the study.

The research findings show that the motivation goal for a shopping trip have evolved from obligatory motive to circumstantial. On the cultural factors, life styles and social influences have also changed hence affecting shopping behaviour across all LSMs. It is empirically concluded that the hypothesis is false given the fact that the research findings show a shift in shopping behaviour as outlined above. It is therefore recommended that from a product development perspective, marketers develop products and services that are aligned to socio-economic changes in a country whether positive or negative.

<b>TABLE OF CONTENTS</b>	<b>PAGE</b>
<b>CHAPTER 1 INTRODUCTION</b>	<b>1</b>
1.1 General Background to the area of study	1
1.2 Research background	4
1.3 Motivation for the Research	5
1.4 Value Of the project	6
1.5 Objectives of the study	7
1.6 Hypothesis	8
1.7 Research methodology	8
1.8 Limitations of the project	9
<b>CHAPTER 2 LITERATURE REVIEW</b>	<b>11</b>
2.1 History and background of LSMs	11
2.2 Consumer behaviour	15
2.2.1 Consumer Culture	18
2.2.1.1 Age, Gender and Household Influences	18
2.2.1.2 Social influences	20
2.2.1.3 Social class Influence	22
2.2.1.4 Religion, Ethnic and Religious Influences	23
2.2.1.5 Psychographics	25
2.2.2 Psychological Core	26
2.2.2.1 Motivation, Ability and opportunity	26
2.2.2.2 Exposure, Attention and Perception	26
2.2.2.3 Attitude Formation	27
2.2.2.4 Changing Attitudes through communication	28
2.2.3 The Process of making Decisions	29

2.2.3.1	Problem Recognition and Information Search	29
2.2.3.2	Judgment and Decision Making	29
2.2.3.3	Post Decision Processes	30
2.2.4	Consumer Behaviour Outcome	31
2.2.4.1	Symbolic Consumer Behaviour, Adoption of, Resistance to, and Diffusion of Innovations	31
2.3	Evaluation of Consumer Behaviour models	32
<b>CHAPTER 3 METHODOLOGY</b>		<b>35</b>
3.1	Broad Aim	35
3.2.	Research design	35
3.3	Sampling	39
3.4	Questionnaire design	39
3.5	The survey	40
3.6	Survey Methodology	40
3.7	Reliable Estimates	41
3.8	How to obtain the margin of error	41
3.9	Reliability	44
3.10	Limitation of the data	45
3.11	Validity	45
3.12	Methodology for analysis and interpretation of results	48
3.13	Data Output	49
<b>CHAPTER 4 MAIN FINDINGS AND DATA ANALYSIS</b>		<b>51</b>
4.1	Societal Environment	51
4.2	Data Interpretation	53
4.2.1	Hypothesis testing with ANOVA	53
4.3	Overall data comparison	55
4.4	Beverage category usership	66
4.5	Durable ownership	69

<b>4.6 Psychological core</b>	<b>69</b>
4.6.1 Motivation	70
4.6.2 Ability	70
4.6.3 Opportunity	71
4.6.4 Exposure, Attention and Perception	71
4.6.5 Knowledge and Understanding	72
4.6.6 Attitude	72
4.6.7 Memory and Retrieval	73
<b>4.7 Consumer Culture</b>	<b>73</b>
4.7.1 Social Influence	73
4.7.2 Life Style	74
4.7.3 Pricing	75
<b>CHAPTER 5 CONCLUSION AND RECOMMENDATIONS</b>	<b>61</b>
5.1. Conclusion	77
5.2 Recommendations	76

<b>LIST OF TABLES</b>	<b>PAGE</b>
-----------------------	-------------

<b>Table 1</b>	<b>Summary – macro economic indicators for Zimbabwe</b>	<b>3</b>
<b>Table 2</b>	<b>Total Population in Zimbabwe by Gender and province</b>	<b>37</b>
<b>Table3</b>	<b>Zimbabwe population aged 15 years and above by Age and Gender</b>	<b>38</b>
<b>Table 4</b>	<b>Actual sample size of the parameters used to cross analyse the Survey data</b>	<b>42</b>
<b>Table 5</b>	<b>Margin of error at 95% confidence interval</b>	<b>43</b>
<b>Table 6</b>	<b>ANOVA – Work Status</b>	<b>58</b>
<b>Table 7</b>	<b>ANOVA – Responsible for Purchase</b>	<b>63</b>
<b>Table 8</b>	<b>ANOVA – Never Use Product</b>	<b>66</b>
<b>Table 9</b>	<b>ANOVA – Durable Ownership</b>	<b>68</b>



<b>LIST OF Illustrations</b>	<b>PAGE</b>
------------------------------	-------------

**Illustration 1 LSM6-10 Consumer portrait** **13**

**Illustration 2 LSM 4 and 5 Consumer Portrait** **14**

**Illustration 3 LSM 1-3 Consumer Portrait** **14**

<b>LIST OF FIGURES</b>	<b>PAGE</b>
<b>Figure 4.1 3 types of grocery shopping</b>	<b>56</b>
<b>Figure 4.2 Channel Characteristics</b>	<b>56</b>
<b>Figure 4.3 Areas Of learning</b>	<b>56</b>
<b>Figure 4.4 Work status</b>	<b>58</b>
<b>Figure 4.5 Total Spend By Channel</b>	<b>58</b>
<b>Figure 4.6 Top Reasons for doing shopping</b>	<b>59</b>
<b>Figure 4.7 Bulk Shopping</b>	<b>59</b>
<b>Figure 4.8 Consumer shopping Incidence</b>	<b>60</b>
<b>Figure 4.9 reasons for Bulk shopping</b>	<b>60</b>
<b>Figure 4.10 Reasons for Fill-up shopping</b>	<b>61</b>
<b>Figure 4.11 Most important items for Fill-up</b>	<b>61</b>
<b>Figure 4.12 Reasons for Daily shopping</b>	<b>62</b>
<b>Figure 4.13 Most important items for Daily shopping</b>	<b>62</b>
<b>Figure 4.14 Responsibility for purchasing</b>	<b>63</b>
<b>Figure 4.15 Family Role in shopping</b>	<b>64</b>
<b>Figure 4.16 Channel Role by LSM</b>	<b>64</b>
<b>Figure 4.17 Number of shopping trips</b>	<b>65</b>
<b>Figure 4.18 Perception of Channel pricing</b>	<b>65</b>
<b>Figure 4.19 Product Usage</b>	<b>66</b>
<b>Figure 4.20 Lifestyles</b>	<b>67</b>
<b>Figure 4.21 Ownership of Durables</b>	<b>68</b>

## **-Chapter One-**

### **1.INTRODUCTION**

#### **1.1 General Background to the area of study**

Zimbabwe, traditionally known as the 'bread-basket' of Southern Africa, has been experiencing an economic downturn for the past decade. Currently, the country is facing severe macro-economic difficulties characterized by a GDP declined of about 30% over the past four years, acute shortages of food and essential commodities, low foreign currency reserves, high build-up in external arrears and a decline in investment. The country has also faced political and social tensions during the process of readdressing past inequities which have necessitated hard policy choices in particular in the area of land reform. This has been made more difficult by the lack of support from the donor community during this period. Zimbabwe is currently ineligible for financial assistance from the IMF because of arrears it has with that institution, and the World Bank has ceased its lending program.

The country's worsening economic circumstances have also been aggravated by implementation of inconsistent macro-economic policies, which includes a fixed exchange rate and fixed interest rates. Prices of most commodities including non-alcoholic beverages have been under price controls until recently. This approach gave birth to black market trading of foreign currency and a thriving parallel market for most commodities including Carbonated Soft Drinks. Coupled with this, Zimbabwe scored a first when its own currency, the Zimbabwe Dollar, came into short supply in June 2003 resulting in the currency being sold on the parallel market. The country's economic and business conditions have been accurately tracked by rate of inflation which has soared from 16% in 1992 to an all time high of 400% in July 2003. The

country is currently going through a price explosion, which has seen a number of consumers in various LSM segments shifting or changing their consumption and purchasing patterns. The brief introduction below is intended to give the reader a background of how the country's economic conditions and business conditions have evolved since 1992. The focus of this paper is however, centered on consumer behaviour with respect to the non-alcoholic beverages across all LSM3 to LSM10. The term beverage(s) will be used to refer to non-alcoholic beverages.

In 1991 Zimbabwe adopted the IMF/WB-sponsored Economic Structural Adjustment Programme (ESAP) against a backdrop of price controls on most commodities including all beverages. For two consecutive years, 1992 and 1993, Zimbabwe experienced a drop in GDP and this was worsened by the 1992 drought. A slow recovery began in 1994, but this was interrupted by another drought in 1995 and substantial budget deficits held interest rates high. The recovery gathered pace in 1996 and early 1997, but policy measures adopted in the second half of 1997 caused the country's economic fortunes to change course. The government replaced ESAP with a 'home-grown' reform package, the *Zimbabwe Programme for Economic and Social Transformation (ZIMPREST)* In April 1998. Given the lack of resources to implement this reform package, it was short-lived and did not achieve the intended results. In yet another attempt to address the declining economic performance, the *Millennium Economic Recovery Programme (MERP)* was launched in August 2001 as a short-term 18-month economic recovery programme. Its objectives was to restore economic vibrancy and address the underlying macroeconomic fundamentals. Unfortunately MERP was rendered ineffective mainly due to the withdrawal of support from most of the international donor community. As of February 2002, Government has launched a 12-month stabilisation measures programme called the *National Economic Revival Programme (NERP): Measures to Address the Current Challenges*, while continuing to consider options for long-term economic recovery for all stakeholders. The NERP has been received with more optimism by donors, private sector and other stakeholders. This is largely due to the mechanism of tripartite

negotiation forum that has broadened economic policy decision making to include government, private sector and labour. The table below shows the country's economic performance from 1991 to 2003 as tracked by GDP, Inflation and exchange rate.

Table 1 Summary Macroeconomic Indicators in Zimbabwe (1995 – 2003)

	1995	1996	1997	1998	1999	2000	2001	2002	2003
<b>Real GDP growth (%)</b>	-0.2	9.7	0.2	-0.5	-2.7	-4.8	-8.5	-13.1	-9.1*
<b>Per capita GDP (%)</b>	0.2	9.7	0.1	-0.5	-4.9	-7.2	-8.9	-13.2	-9.3*
<b>CPI (End of Period)</b>	25.8	16.4	20.1	47.2	56.2	55.2	112.1	198.9	1000*
<b>Ex Rate (End Period)</b>	9.3	10.8	18.6	37.4	38.1	55.1	55.1	824	824*

*Projected Inflation (estimate) \**

*Economic growth projections assuming NERP will recover the economy. These are unlikely to be realised.*

*Source: Zimbabwe National Accounts Statistics 2002&2003 Forecasts*

After a steep fall in the Zimbabwe dollar exchange rate at the end of 1997, inflation began to rise steeply, and it surged upwards again in 1998 after Zimbabwean troops were sent to the Congo. During these two years, the country's formerly strong foreign reserves were drained away. The chances of replenishing these reserves in the following years declined as a fixed exchange rate policy was adopted in 1999. This was briefly relaxed in 2000, but by 2001 many export-earning companies had shut down production lines or closed altogether.

Foreign earnings declined and the shortage of foreign exchange led to very high rates being offered to those with foreign currency to sell. In November 2002, the

government reintroduced price controls against a backdrop of shortages of most commodities in which soft drinks were included. As the parallel rate rose, inflation increased to the highest levels yet recorded in Zimbabwe. On May 7 2003, the government uplifted the price freeze, resulting in beverage companies raising their prices by over 300%. However, alcoholic beverages were excluded from price controls and were hence the main driver of inflation within the beverages and tobacco index during the price control regime. In the consumer goods category, the trend shows that beverage price increases are third largest coming after Recreation and Transport & Communication.

## **1.2 Research Background**

Beverage consumption is across all LSM groupings and is varied by differential factors such as income, social factors, values & life styles to mention a few. LSMs in the different countries are comparable only in theory, in that they use the same methodology commonly referred to as AMPS (All Media, Products and Services Surveys) as a data source and use of variables to predict which segment a consumer can be classified into).

Practically, the various LSMs across various countries are not directly comparable since different (country specific) variables are used to determine LSMs, For instance, an LSM 10 in Zimbabwe is not the same as in South Africa or Namibia. Different countries' economic circumstances lead to different variables being used in the prediction of which socio-economic segments consumers belong to.

LSM 10 consumers are no longer income constrained and could be ranked in the high level of affluence with the least affluence in LSM 1. The research proposed in this paper was undertaken across all LSMs in Zimbabwe and therefore takes cognizance of the fact that the economic and social status differ across LSMs. With the Zimbabwe environment in a state of constant change, we need to understand how the various

LSM beverage consumption patterns have been affected. It is therefore imperative that we consistently and constantly evaluate LSM3 to LSM10 consumer beverage consumption in relation to their psychological core and cultural factors. This study aims to analyse the data as a validation process thus addressing the key research question, as to whether or not consumer behaviour has evolved in line with the changes taking place in the economic environment and also whether a strong case can be put forward for the entire (including alcoholic) beverage industry.

The survey was conducted by contracted students focusing on consumer behaviour variables for the various LSM consumers. The survey instrument, the questionnaire, was piloted prior to the survey. The interviews for this survey were conducted in Zimbabwe's Urban and Rural areas. In our research the market segmentation breakdown to be used is based on residential areas: Rural, Peri-Urban, Urban-High density and Urban-Low density. Such segmentation enables comparability across the countries within the region. All the sample data collected randomly for this study was weighted and projected to the national population. The interviews for this survey were conducted in three main Zimbabwean languages of Shona, Ndebele & English.

### **1.3 Motivation for the Research**

According to Hooley et al (1998) pg 131 "the critical issues concerning current customers are: who the prime market targets are, what gives them value and how they can be served better." In the future we also need to understand how customers will change, and who the potential new customers are and how to pursue them. Possible changes could be changes in existing customer's needs, wants and expectations due to any variety of societal issues. New customers can also present themselves as more attractive targets. As social, cultural and economic change has affected living standards, so according to Hooley et al (1998) pg 133-134 has it affected the demand for goods and services" e.g. in Europe there is now increased demand for healthy foods, sports and leisure equipment and services, such that

markets which may have been less attractive in the 1960 are now booming (the economist 1997)".

Despite the fact that inflation has been on an upward trend, beverage consumption patterns have been evolving with periods of growth across the entire category and periods of decline being experienced in some segments of the category. In addition new entrants into the industry have been experiencing phenomenon growth particularly in certain beverage segments such as water and juices. Foreign currency shortages caused shortages of water treatment chemicals in Harare and other major urban cities forcing consumers to go for commercial water. This background has necessitated a deep understanding of beverage consumption as purchasing power and distribution patterns become critical variables in the consumer behaviour dynamics. This is essential for ensuring business viability and retaining as well as expanding market share.

#### **1.4 Value Of The Project**

As the aim of marketing is to persuade the consumer to buy a product or service, gaining a better understanding of the factors influencing how the consumers will respond will help beverage manufacturers become better at predicting the effectiveness of their marketing activities. This project will help marketers in the beverage industry both at manufacturing level and at retail level to have a deeper understanding of the key drivers of beverage consumption or consumer behaviour with respect to purchase and consumption of beverages.

Most published theory is on the basis of developed markets where the economic fundamentals have limited distortions hence the need for us to test it in volatile and unstable markets such as Zimbabwe.



Beverage consumption patterns are evolving since Zimbabwe started experiencing an economic downturn from 1998 and subsequently went into recession. Beverage consumption patterns continue to change as economic conditions change, and there is need to continuously understand consumer beverage consumption patterns in Zimbabwe given the worsening harsh economic conditions. Purchasing and distribution patterns become more critical variables in consumer behaviour dynamics.

Sometimes under harsh economic conditions, total beverage consumption may remain high or even increase, but the composition of the items consumed may change considerably. As such, beverage producers have to respond to what the market demands and can afford. In addition to changing basket composition, beverage distribution may also find its way into the informal market just like most other consumer products in Zimbabwe. This has many implications for price monitoring and distribution policies by beverage producers.

Thus, in short the problem statement is:

“How can the non alcoholic beverage industry keep abreast the complex consumer behaviour dynamics in a harsh and volatile economic environment such as in Zimbabwe?”

### **1.5 Objectives of the Study**

Using Zimbabwe as a case study, the objectives of this study are

- To evaluate non-alcoholic beverage consumption patterns in constantly changing Zimbabwean economy in order to formulate strategies for ensuring business viability and retaining and expanding market share.
- To determine the key psychological and cultural factors with regard to beverage consumption that will allow marketers to more effectively target and reach LSMs3 to LSM10 consumers.

- To establish information needs that will enable beverage marketers to better design and execute consumer segment specific marketing programs. The information will also ensure that advertising and marketing functions are executed more effectively to maximize the return of expenditure in these areas.
- To measure media consumption patterns for LSM3 to LSM10 and how they have shifted over time

### **Outputs**

- Detailed mapping of consumer segments against retail channels used for different types of shopping trips
- LSM3 to LSM10 consumer shopping behaviour and role of brands/products in the shopping occasions at which groceries are purchased to take home
- Consumers' perceived value propositions for different types of retail outlets.
- Opportunities for LSM consumer segment, for driving additional purchases for various products.
- Significance of the psychological and cultural factors on LSM shopping behaviour.

## **1.6 Hypothesis**

The null hypothesis can be stated as follows:

'Different LSMs will always maintain their beverage consumption patterns for non alcoholic beverages regardless of the country's economic status.'

## **1.7 Research Methodology**

Quantitative and descriptive research design method was applied in order to understand beverage consumption pattern variables in a Zimbabwean context. This research design method has been selected on the basis of the fact that its goal is to shed light on the real nature of the problem and to suggest possible solutions on new

ideas. In this case, the objective is to understand how consumer behaviour variables influence beverage consumption in a volatile environment such as Zimbabwe.

A combination of qualitative, quantitative as well as primary and secondary data collection methods was used.

- The primary source of data was a random survey conducted in top-end stores within urban residential areas. Use was made of the following:
  - Nationally representative sample of LSM3 to LSM10 consumers.
  - 5 – 10 minute in person interview was conducted about grocery purchase behavior.
  - A sample of 220 interviews in the 10 provinces of the country
  - The survey will use stratified random sampling and the data collection instrument was a questionnaire, which will largely pick up the consumer's perceptions of how they are making their decisions.
- The secondary source of data was desk research and will include the information collected from the Zimbabwe Central Statistical Office (CSO) publications, British council Library in Harare, environmental and societal issues such as the economy and socio-political climate and lastly John Robertson Economic Information Services. Information about consumers will also be obtained from distribution channel records. (OK Zimbabwe, TM Supermarkets, Jaggars and Makro to mention a few). In addition, an interview was conducted with Chief Executive officers of leading beverage companies in Zimbabwe.

### **1.8 Limitations of the Project**

- The data from the survey is based on self-reported respondent recall of general and last beverage purchase. As with all market research, recall data often exhibits some degree of over claim.

- Distortions may occur in income flows for Zimbabweans with relatives who live abroad, which is not accounted for in the GDP computation. Cash inflow from Zimbabweans living abroad is further aggravated as it is transacted at parallel market rates that are over 150% above the official rates.
- The distribution, taking place in the informal market maybe difficult to establish.

## **-CHAPTER TWO-**

### **2. Literature Review**

#### **2.1 History and background of LSMs**

An attempt has been made to critically review the literature on Consumer Behaviour and LSMs as a market segmentation tool.

As background to the subject LSMs will be defined and then a critical evaluation of consumer behaviour models will be provided with a comparison of the applicability of these models to first world (Great Britain specifically) and third world countries such as Zimbabwe. The reasons why they are either similar or different will be explored. This section will also cover a review of the theories and literature of various authors in the area of segmentation and target marketing. One of the authors whose work was reviewed in this section is Peter Doyle in Chapter 73 especially with regard to dynamic targeting strategies, where he discusses different types of segmentation and three market targeting strategies (page 73,74) The first being undifferentiated marketing where the firm ignores potential differences among segments and targets one offer to the entire market. The second is Differentiated marketing where different offers are targeted at specific segments. The third strategy is focussed marketing where the company only targets one niche market (e.g. one LSM group) usually with high value. The latter two strategies and other forms of innovative segmentation are only possible in Zimbabwe through the use of LSMs as a segmentation tool.

Lastly in order to justify the selected methodology for testing the hypothesis, which is firmly based on accepted theory, a review of existing literature on statistical analysis and quantitative research methods will be carried out such as the work of Anderson et al, Churchill, Saunders et al, amongst other authors.

### **What LSM's are**

In the past non-scientific (subjective) socio-economic groups, area population density, education and claimed income have been used to segment the market. Nevertheless education has ceased to be a reliable discriminator due to the prevailing harsh economic situation which has led to massive unemployment. Whether a person lives in an area with high, medium or low population density, is fast becoming a non-discriminatory element as the areas are rapidly merging with rapid urbanisation and diminishing power of disposable income. There is also an increased difficulty in obtaining reliable income answers with most employed people taking up supplementary income generating projects and also supporting larger families affected by the advent of the HIV/AIDS pandemic.

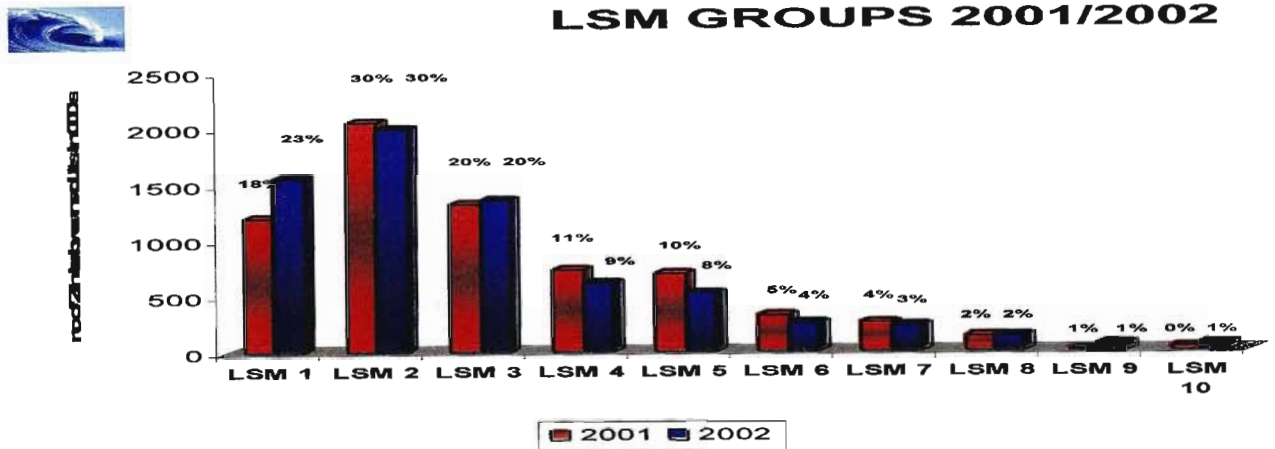
In short all the variables, mostly demographic that have been used in the past to segment markets in Zimbabwe with reasonable success have all become fuzzy and indistinguishable. Marketers are unable to professionally or effectively target relevant consumer segments for strategic marketing purposes.

LSM's are a robust indicator of the principle axis of a consumer market and a reliable measure of

- ↳ *Standard of living*
- ↳ *Wealth*
- ↳ *Affluence*

They are supposed to act as a peg for fully descriptive targeting or profiling of consumers when combined with demographic, psychographic, typology, behavioral and needs based segmentation studies.

LSM groups for Zimbabwe are summarised in the following graph;



The LSM Consumer Portraits are shown below

ILLUSTRATION 1

### LSM 6-10 Consumer Portrait



Confidential

#### Key Characteristics

•Predominantly Urban.

	2002	2005
Population	30%	28%
Volume	87%	73%

•Skilled Blue collar, informal sector, trade, professionals, self-employed.

•Opportunities to earn a living through formal and informal means.

#### Trends

•Consumer purchasing habits driven by varied need states, lifestyles and occasions.

•Consumers need variety and are prepared to pay more for convenience and quality.

•Teens are very trendy and spend money on discretionary items.

•Teens have a wide variety of repertoire products to choose from but with limited income.

•Key Beverages include Fizzy drinks, Tea, Squashes and cordials, Juice, Beer & Others.

1



ILLUSTRATION 2

**LSM 4 & 5 Consumer Portrait**



Confidential

**Key Characteristics**

•Bottom end urban and peri-urban.

	2002	2005
Population	30%	37%
Volume	10%	20%

•Live in both low & high population density neighbourhoods but with limited basic amenities.

•Unskilled Blue collar, agriculture, informal sector, & urban under/unemployed.

•Hardest hit by socioeconomic declines.

**Trends**

•Consumers are becoming increasingly choosy due to shrinking disposable income - relevance and value are key.

•Our Brands are experiencing tight competition for consumer share of pocket with basic necessities & other discretionary items.

•Consumer purchase habits driven by affordability, value and relevance to need states.

2

ILLUSTRATION 3

**LSM 1 - 3 Consumer Portrait**



Confidential

**Key Characteristics**

•Predominantly rural with small pockets of Peri-urban.

	2002	2005
Population	40%	35%
Volume	3%	7%

•Live in low population density areas with few basic amenities.

•Agriculture, informal sector, & rural under/unemployed.

•Socioeconomic declines threaten their basic existence.

•They fall into the 2 billion of the world's population that don't have access to basic, clean water.

**Trends**

•Consumers shop around for affordable products due to limited disposable income.

•Consumers perceive Fizzy drinks as "luxury" and therefore do not purchase these frequently.

•Food items that deliver both beverage and nutritional properties are higher on priority list.

3



## **2.2 Consumer Behaviour**

Consumer behaviour is the study of the processes involved when individuals or groups select, purchase, use or dispose of products, services, ideas or experiences to satisfy needs and desires. A consumer may purchase, use and/or dispose of a product, but these functions may be performed by different people. In addition, consumers may be thought of as role players who need different products to help them play their various parts. Market segmentation is an important aspect of consumer behaviour. Consumers can be categorized using many criteria, including product usage, demographics (the objective aspects of a population, such as age and sex) and psychographics (psychological and lifestyle characteristics). Emerging developments, such as the new emphasis on relationship marketing and the practice of database marketing, mean that marketers are much more attuned to the wants and needs of different consumer groups. Marketing activities exert an enormous impact on individuals. Consumer behaviour is relevant to our understanding of both public policy issues (for example, ethical marketing practices) and the dynamics of popular culture.

There are many perspectives on consumer behaviour, but research orientations can be roughly divided into two approaches. The positivist perspective, which currently dominates the field, emphasizes the objectivity of science and the rationality of the consumer as a decision maker. The interpretivist perspective, in contrast, stresses the subjective meaning of the consumer's individual experience and the idea that any behaviour is subject to multiple interpretations rather than to a single explanation.

### **Economic Theory and Consumer Behaviour**

With respect to normal goods, as prices go up, demand goes down. While for basic necessities, as prices go up demand remains stable. On the other hand, as price goes up, demand comes down for prestige value goods while for substitutes demand comes down as prices go up as consumers move to cheaper substitutes. For complementary goods, price and demand will go up simultaneously.

According to 'Hoyer/MacInnis – Consumer behaviour page 5', Consumer behaviour reflects the totality of consumer decisions with respect to the acquisition, consumption and disposition of goods services by human decision making units over time.

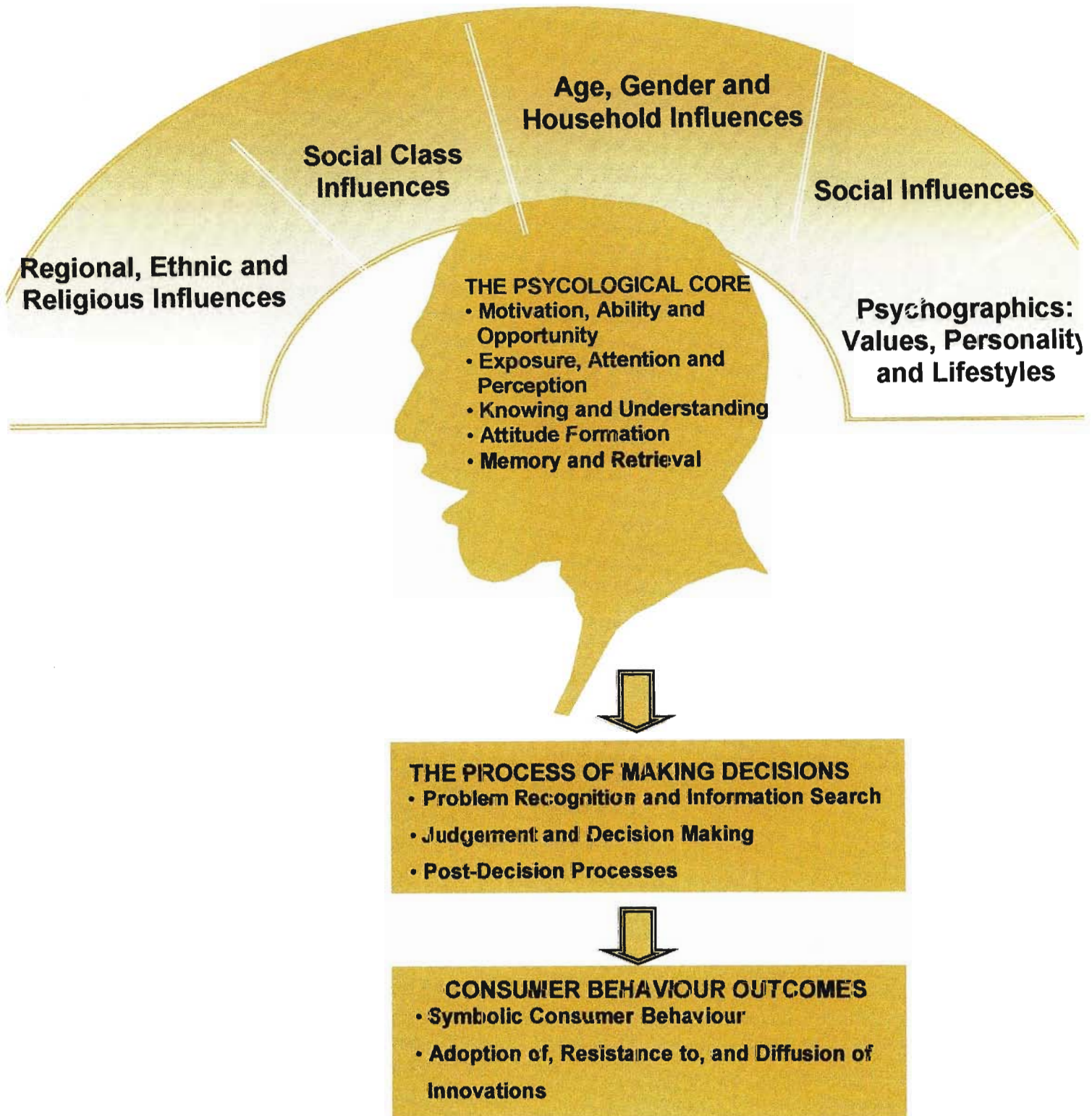
Consumer behaviour encompasses four domains as outlined below:

- The psychological core
- The process of making decisions
- The consumers culture
- Consumer behaviour outcomes.

Each domain is related to all the others, for example, to make decisions that affect outcomes like buying a product such as a juice or using products for symbolic reasons such as drink sprite for teenagers, consumers must first engage in processes described in the psychological core. They need to be motivated, able and have the opportunity to be exposed to, perceive and attend to information. They need to think about this information, form attitudes about it and form memories .The cultural environment also affects what motivates consumers, how they process information and the kind of decisions they make .Age, gender, social class, ethnicity families friends and other groups affect values and life styles and hence influence the decisions consumers make and how and why they are made.

Adapted From Hoyer And MacInnis – Consumer Behaviour textbook

## The Consumer's Culture



## **2.2.1 THE CONSUMER'S CULTURE**

### **The Creation of a Culture**

The styles prevalent in a culture at any given point in time often reflect underlying political and social conditions. The set of agents responsible for creating stylistic alternatives is termed a culture production system. Factors such as the types of people involved in this system and the amount of competition by alternative product forms influence the choices that eventually make their way to the marketplace for consideration by end consumers. Culture is often described in terms of high forms and low (or popular) forms. Products of popular culture tend to follow a cultural formula and contain predictable components. On the other hand, these distinctions are blurring in modern society as imagery from high art is increasingly being incorporated into marketing efforts.

Reality engineering occurs as elements of popular culture are appropriated by marketers and converted to vehicles for promotional strategies. These elements include sensory and spatial aspects of everyday existence, whether in the form of products appearing in movies, odours pumped into offices and stores, billboards, theme parks or video monitors attached to shopping carts.

### **2.2.1.1 Age, Gender and household Influences**

#### **a) Age and Consumer Identity**

People have many things in common with others merely because they are about the same age. Consumers who grew up at the same time share many cultural memories and belong to the same age cohort. Consumers often feel positively about products they used when they were younger, so they may be receptive to marketers' nostalgic appeals that remind them of these experiences. Four important age cohorts are: teens, university students, baby boomers and mature consumers. Teenagers are

making a transition from childhood to adulthood, and their self-concepts tend to be unstable. They are receptive to products that help them to be accepted and enable them to assert their independence. Because many teens earn money but have few financial obligations, they are a particularly important segment for many non-essential or expressive products, ranging from chewing gum to clothing fashions and music. Due to changes in family structure, many teens are also taking more responsibility for their families' day-to-day shopping and routine purchase decisions.

University students are an important market, but they are hard to reach via conventional media. In many cases they are living alone for the first time, so they are making important decisions about setting up households. Many marketers appeal to this group by staging events or other elaborate promotions. Baby boomers are the most powerful age segment due to the segment's size and economic clout. The needs and desires of baby boomers affect demands for housing, child care, automobiles, clothing and financial services. As the population ages, the needs of mature consumers will also become increasingly influential. Many marketers traditionally ignored this age segment due to the stereotype that they are too inactive and spend too little. This stereotype is no longer accurate. Most are healthy, vigorous and interested in new products and experiences—and they have the income to purchase them. Marketing appeals to this age subculture should focus on consumers' self-concepts and perceived ages, which tend to be more youthful than their chronological ages. Marketers should also emphasize concrete benefits of products, since this group tends to be skeptical of vague, image-related promotions. Personalized service is of particular importance to this segment.

#### **b) Perspectives on the Self-Consumption and Self-Concept, Gender Roles**

Consumers' self-concepts are reflections of their attitudes towards themselves. Whether these attitudes are positive or negative, they will help to guide many purchase decisions. Products can be used to bolster self-esteem or to reward the self. Many product choices are dictated by the consumer's perception of a similarity

between his or her personality and certain attributes of the product. The symbolic interactionist perspective on the self suggests that each of us actually has many selves, and a different set of products is required as a prop to play each role. Many things apart from the body can also be viewed as a part of the self. Valued objects, cars, homes and even attachments to sports teams or national monuments are used to define the self when these are incorporated into the extended self.

A person's gender role identity is a major component of self-definition. Conceptions about masculinity and femininity, largely shaped by society, guide the acquisition of gender-typed products and services. Advertising and other media play an important role in socializing consumers in male and female roles. While traditional women's roles have often been perpetuated in advertising depictions, this situation is changing somewhat. The media do not always portray men accurately, either. A person's conception of his or her body also provides clues about their self-image. A culture communicates certain ideals of beauty, and consumers go to great lengths to attain these. Many consumer activities involve manipulating the body, whether through dieting, cosmetic surgery, tattooing or the like. Sometimes these activities are carried to an extreme, as people try too hard to live up to cultural ideals. One example is found in eating disorders, with women in particular becoming obsessed with thinness.

#### **2.2.1.2 Social Influences**

##### **a) Reference Groups and Opinion Leaders**

Consumers belong to or admire many different groups and are often influenced in their purchase decisions by a desire to be accepted by others. Individuals have influence in a group to the extent that they possess social power. Types of power include information power, referent power, legitimate power, expert power, reward power and coercive power.

We conform to the desires of others for one of two basic reasons. People who model their behaviour after others because they take others' behaviour as evidence of the correct way to act are conforming because of informational social influence. Those who conform to satisfy the expectations of others and/or to be accepted by the group are affected by normative social influence. Group members often do things they would not do as individuals because their identities become merged with the group. Individuals or groups whose opinions or behaviours are particularly important to consumers are known as reference groups. Both formal and informal groups influence the individual's purchase decisions, although the impact of reference group influence is affected by such factors as the conspicuousness of the product and the relevance of the reference group for a particular purchase.

Opinion leaders who are knowledgeable about a product and whose opinions are highly regarded tend to influence others' choices. Specific opinion leaders are somewhat hard to identify, but marketers who know their general characteristics can try to target them in their media and promotional strategies. Other influencers are market mavens, who have a general interest in marketplace activities, and surrogate consumers, who are compensated for their advice about purchases. Much of what we know about products comes about through word-of-mouth communication (WOM) rather than through formal advertising. Product related information tends to be exchanged in casual conversations. While word-of-mouth is often helpful for making consumers aware of products, it can also hurt companies when damaging product rumours or negative word-of-mouth occurs. Sociometric methods are used to trace referral patterns. This information can be used to identify opinion leaders and other influential consumers.

#### **b) The Family**

Many purchasing decisions are made by more than one person. Family or household decision-making occurs whenever two or more people are involved in evaluating, selecting or using a product or service. In families, several different roles must be

played during the decision making process. These roles include initiator, information gatherer, gatekeeper (the one who controls the flow of information within the group), influencer, decision maker, buyer, prepare, user, maintainer and disposer.

Demographics are statistics that measure a population's characteristics. Some of the most important of these relate to family structure (e.g., the birth rate, the marriage rate and the divorce rate). A household is an occupied housing unit.

The number and type of Zimbabwean households are changing in many ways, including increasing movement by consumers to suburban and rural areas, delays in getting married and having children, and differences in the composition of family households, which are increasingly headed by a single parent.

Children undergo a process of socialization, whereby they learn how to be consumers. Some of this knowledge is instilled by parents and friends, but a lot of it comes from exposure to mass media and advertising. Since children are, in some cases, easily persuaded, the ethical aspects of marketing to them are hotly debated among consumers, academics and marketing practitioners.

### **2.2.1.3 Social Class Influences**

#### **a) Social Class and Status Symbols**

The field of behavioural economics considers how consumers decide what to do with their money. In particular, discretionary expenditures are made only when people are able and willing to spend money on items above and beyond their basic needs.

Consumer confidence—the state of mind consumers have about their own personal situations, as well as their feelings about their overall economic prospects—helps to determine whether they will purchase goods and services, take on debt or save their money.

In the 1990s, consumers overall have been relatively pessimistic about their future prospects. A lower level of resources has caused a shift towards an emphasis on



quality products that are reasonably priced. Consumers are less tolerant of exaggerated or vague product claims, and they are more skeptical about marketing activities. Consumers in their twenties are particularly skeptical about the economy and about marketing messages targeted to their age group. A consumer's social class refers to his or her standing in society. It is determined by a number of factors, including education, occupation and income. Virtually all groups make distinctions among members in terms of relative superiority, power and access to valued resources. This social stratification creates a status hierarchy, in which some goods are preferred over others and are used to categorize their owners' social class. While income is an important indicator of social class, the relationship is far from perfect since social class is also determined by such factors as place of residence, cultural interests and world-view.

Purchase decisions are sometimes influenced by the desire to buy up to a higher social class or to engage in the process of conspicuous consumption, where one's status is flaunted by the deliberate and non-constructive use of valuable resources. This spending pattern is characteristic of the nouveaux riches, whose relatively recent acquisition of wealth, rather than ancestry or breeding, is responsible for their increased social mobility. Products often are used as status symbols to communicate real or desired social class. Parody display occurs when consumers seek status by deliberately avoiding fashionable products. Within the beverage category this spending pattern is seen for high profile products such as Play, PowerAde, Nestea and other sports, energy and rejuvenation drinks that are perceived as status symbols.

#### **2.2.1.4 Religion, Ethnic and Religion Influences**

##### **a) Subcultures and Consumer Identity**

Consumers identify with many groups that share common characteristics and identities. These large groups that exist within a society are known as subcultures,

and they often give marketers clues about members' consumption decisions. A large component of a person's identity is often determined by his or her ethnic origins and regional roots. The four largest ethnic subcultures are Asians, Coloured, Africans and Europeans. Segmenting consumers by their ethnicity can be effective, but care must be taken not to rely on inaccurate (and sometimes offensive) ethnic stereotypes.

### **b) Ethnic and Religion Influences**

While the impact of religious identification on consumer behaviour is not clear, some differences among religious subcultures do emerge. In particular, cultural characteristics of Protestants, Catholics and Jews result in varied preferences for leisure activities and orientations towards consumption. Some of these factors are closely related to social class. White Zimbabweans in particular, have played a dominant role in the formation of the Zimbabwean cultural values largely due to emphasis on achievement and the history of colonization. Both white and black Zimbabwean tend to be extremely family- oriented, and they are receptive to advertising that understands their heritage and reinforces traditional family values.

### **c) Myths and Rituals - Sacred and Profane Consumption**

A society's culture includes its values, its ethics and the material objects produced by its people. It is the accumulation of shared meanings and traditions among members of a society. A culture can be described in terms of its ecology (the way people adapt to their habitat), its social structure and its ideology (including people's moral and aesthetic principles). Myths are stories containing symbolic elements that express the shared ideals of a culture. Many myths involve some binary opposition, whereby values are defined in terms of what they are and what they are not (e.g., nature versus technology). Modern myths are transmitted through advertising, movies and other media.

A ritual is a set of symbolic behaviours that occur in a fixed sequence and that tend to be repeated periodically. Rituals are related to many consumption activities that occur

in popular culture. These include holiday observances, gift giving and grooming. A rite of passage is a special kind of ritual that involves the transition from one role to another. These passages typically entail the need to acquire products and services, called ritual artifacts, to facilitate the transition. Modern rites of passage include graduations, initiations, weddings, debutante balls and funerals. Consumer activities can be divided into sacred and profane domains. Sacred phenomena are set apart from everyday activities or products. People, events or objects can become sacralized. Sacralization occurs when sacred qualities are ascribed to products or items owned by sacred people. Objectification occurs when formerly sacred objects or activities become part of the everyday, as when one-of-a-kind works of art are reproduced in large quantities. Descralization occurs when objects that previously were considered sacred become commercialized and integrated into popular culture.

#### **2.2.1.5 Psychographics**

##### **a) Values, Personality and Lifestyles**

A consumer's lifestyle refers to the ways he or she chooses to spend time and money, and how his or her values and tastes are reflected by consumption choices. Lifestyle research is useful to track societal consumption preferences and also to position specific products and services to different segments. Marketers segment the market according to lifestyle differences, often by grouping consumers in terms of their AIOs (activities, interests and opinions). Psychographic techniques attempt to classify consumers in terms of subjective psychological variables in addition to observable characteristics (demographics). A variety of systems, such as VALS 2, have been developed to identify consumer types and to differentiate them in terms of their brand or product preferences, media usage, leisure-time activities, and attitudes towards such broad issues as politics and religion.

Place of residence is often a significant determinant of lifestyle. Many marketers recognize regional differences in product preferences and develop different versions

of their products for different markets. A set of techniques called geodemography analyzes consumption patterns using geographical and demographic data, and identifies clusters of consumers who exhibit similar psychographic characteristics.

## **2.2. 2 THE PSYCHOLOGICAL CORE**

### **2.2.2.1 Motivation, Ability and Opportunity**

Marketers try to satisfy consumer needs, but the reasons any product is purchased can vary widely. The identification of consumer motives is an important step towards ensuring that the appropriate needs will be met by a product. Traditional approaches to consumer behaviour have focused on the abilities of products to satisfy rational needs (utilitarian motives), but hedonic motives (such as the needs for exploration or fun) also play a role in many purchase decisions. As demonstrated by Maslow's hierarchy of needs, the same product can satisfy different needs, depending upon the consumer's state at the time (i.e., whether basic physiological needs have already been satisfied). A beverage such as Sprite which is predominantly targeted at Teens can satisfy two needs for the teens, i.e. the need for refreshment and the need for self-expression. The brand positioning is that Sprite encourages the youth to trust their own instincts and this is in line with self-expression. In addition to his or her objective situation, the consumer's degree of involvement with the product must be considered. Consumer motivations often are driven by underlying values. In this context, products take on meaning because they are seen as being instrumental in helping the person to achieve some goal that is linked to a value, such as individuality or freedom.

### **2.2.2.2 Exposure, Attention and Perception**

Perception is the process by which physical sensations such as sights, sounds and smells are selected, organized and interpreted. The eventual interpretation of a stimulus allows it to be assigned meaning. A perceptual map is a widely used marketing tool that evaluated the relative standing of competing brands along relevant

dimensions. Marketing stimuli have important sensory qualities. We rely on colours, odours, sounds, tastes and even the "feel" of products when forming evaluations of them.

Not all sensations make their way successfully through the perceptual process. Many stimuli compete for our attention, and the majority are not noticed or accurately comprehended. People have different thresholds of perception. A stimulus must be presented at a certain level of intensity before it can be detected by an individual's sensory receptors. In addition, a consumer's ability to detect whether two stimuli are different (the differential threshold) is an important issue in many marketing contexts, such as changing a package design, altering the size of a product or reducing its price.

A lot of controversy has been sparked by so-called subliminal persuasion and related techniques, by which people are exposed to visual and audio messages below the threshold. Although evidence of subliminal persuasion's effectiveness is virtually nonexistent, many consumers continue to believe that advertisers use this technique. Some of the factors that determine which stimuli (above the threshold level) do get perceived are the amount of exposure to the stimulus, how much attention it generates and how it is interpreted. In an increasingly crowded stimulus environment, advertising clutter occurs when too many marketing-related messages compete for attention.

### **2.2.2.3 Attitude Formation**

An attitude is a predisposition to evaluate an object or product either positively or negatively. Attitudes are made up of three components: beliefs, affect and behavioural intentions. Attitude researchers traditionally assumed that attitudes were learned in a fixed sequence, consisting first of the formation of beliefs (cognitions) regarding an attitude object and followed by some evaluation of that object (affect) and then some action (behaviour). Depending upon the consumer's level of

involvement and the circumstances, however, attitudes can result from other hierarchies of effects as well. A key to attitude formation is the function that the attitude plays for the consumer (e.g., is it utilitarian or ego-defensive?).

One organizing principle of attitude formation is the importance of consistency among attitudinal components; that is, some parts of an attitude may be altered to be in line with others. Theoretical approaches to attitudes, such as cognitive dissonance theory, balance theory and congruity theory stress the vital role of the need for consistency. The complexity of attitudes is underscored by multi-attribute attitude models, in which sets of beliefs and evaluations are identified and combined to predict an overall attitude. Factors such as subjective norms and the specificity of attitude scales have been integrated into attitude measures to improve predictability.

### **Changing Attitudes Through Communication**

Persuasion refers to an attempt to change consumers' attitudes. The communications model specifies the elements needed to transmit meaning. These include a source, a message, a medium, a receiver and feedback. Two important characteristics that determine the effectiveness of a source are its attractiveness and credibility. While celebrities often serve this purpose, their credibility is not always as strong as marketers hope.

Some elements of a message that help to determine its effectiveness are: whether it is conveyed in words or in pictures, whether an emotional or a rational appeal is employed, the frequency with which it is repeated, whether a conclusion is drawn, whether both sides of the argument are presented, and whether the message includes fear, humour or sexual references. Advertising messages often incorporate elements from art or from literature, such as drama, lecture, metaphor, allegory and resonance. The relative influence of the source versus the message depends upon the receiver's level of involvement with the communication. The elaboration likelihood model specifies that a less involved consumer will be more likely to be swayed by

source effects, while a more involved consumer will be more likely to attend to and process components of the actual message

## **2.2.3 THE PROCESS OF MAKING DECISIONS**

### **2.2.3.1 Problem Recognition and Information Search**

Consumers are faced with the need to make decisions about products all the time. Some of these decisions are very important and entail great effort, while others are made on a virtually automatic basis. Perspectives on decision making range from a focus on habits that people develop over time to a focus on novel situations involving a great deal of risk, where consumers must carefully collect and analyze information prior to making choices. A typical decision process involves several steps. The first is problem recognition, where the consumer first realizes that some action must be taken. This realization may be prompted in a variety of ways, ranging from the malfunction of a current purchase to a desire for new things based on exposure to different circumstances or advertising that provides a glimpse of what is needed to live the good life. Once a problem has been recognized and is seen as sufficiently important to warrant some action, a search for information begins. This search may range from a simple scanning of memory, to determine what has been done to resolve the problem in the past, to undertaking extensive fieldwork, where the consumer consults a variety of sources to amass as much information as possible. In many cases people engage in surprisingly little searching. Instead, they rely upon various mental shortcuts, such as brand names or price, or they may simply imitate others.

### **2.2.3.2 Judgment and Decision Making**

In the evaluation-of-alternatives stage the product alternatives that are considered comprise the individual's evoked set. Members of the evoked set usually share some characteristics; that is, they are categorized similarly. The way products are mentally grouped influences which alternatives will be considered, and some brands are more

strongly associated with these categories than others (i.e., they are more prototypical). Very often heuristics, mental rules of thumb, are used to simplify decision-making. In particular, people develop many market beliefs over time. One of the most common beliefs is that price is positively related to quality. Other heuristics rely on well-known brand names or a product's country of origin as signals of quality. When a brand is consistently purchased over time, this pattern may be due to true brand loyalty or due simply to inertia (it's the easiest thing to do).

When the consumer must eventually make a product choice from among alternatives, a number of decision rules may be used. Noncompensatory rules eliminate alternatives that are deficient in any of the criteria the consumer has chosen to use. Compensatory rules, which are more likely to be applied in high-involvement situations, allow the decision maker to consider each alternative's good and bad points more carefully in order to arrive at the overall best choice.

### **2.2.3.3 POST-DECISION PROCESS**

#### **2.2.3.3.1 Situational Effects on Consumer Behaviour, The Purchase Environment, and Post purchase Satisfaction**

The act of purchase can be affected by many factors. Among these factors is the consumer's antecedent state: his/her mood, time pressure, or disposition towards shopping. Time is an important resource that often determines how much effort and search will go into a decision. Mood can be affected by the degree of pleasure and arousal present in a store environment. The usage context of a product can be a basis for segmentation. Consumers look for different product attributes depending upon the uses to which they intend to put their purchases. The presence or absence of other people—and the types of people they are—can also affect a consumer's decisions. The consumer's encounter with a salesperson is a complex and important process. The outcome can be affected by such factors as the salesperson's similarity to the customer and his or her perceived credibility.



Consumer satisfaction is determined by the person's overall feeling towards the product after purchase. Many factors influence perceptions of product quality, including price, brand name and product performance. Satisfaction is often determined by the degree to which a product's performance is consistent with the consumer's prior expectations of how well it will function.

## **2.2.4 CONSUMER BEHAVIOUR OUTCOMES**

### **2.2.4.1 Symbolic Consumer Behaviour, Adoption of, Resistance and Diffusion of Innovations**

Diffusion of innovations refers to the process whereby a new product, service or idea spreads through a population. Innovators and early adopters are quick to adopt new products, while laggards are very slow. A consumer's decision to adopt a new product depends on his or her personal characteristics as well as on characteristics of the innovation itself. Products stand a better chance of being adopted if they demand relatively little change in behaviour from users, are easy to understand and provide a relative advantage compared to existing products.

The fashion system includes everyone involved in the creation and transference of symbolic meanings. Meanings that express common cultural categories (e.g., gender distinctions) are conveyed by many different products. New styles tend to be adopted by many people simultaneously in a process known as collective selection. Perspectives on motivations for adopting new styles include psychological, economic and sociological models of fashion. Fashions tend to follow cycles that resemble the product life cycle. The two extremes of fashion adoption—classics and fads—can be distinguished in terms of the length of this cycle.

## **2.3 EVALUATION OF CONSUMER BEHAVIOUR MODELS**

The process of consumer buying behaviour is influenced by external cultural, social, personal and psychological factors influencing the decision. As the focus of this study

is to understand how psychological and cultural variables influence consumer behaviour with respect to beverage consumption and given the complexity of these factors influencing the process of consumer behaviour, models can be used in simplifying the process to make it more manageable for marketers, bearing in mind that their ultimate objective is to build repeat purchasing patterns on an ongoing basis. One of the major ways in which models may help the marketer is to put some form of framework on the thought processes that the consumer goes through when buying. If the marketer understands these thought processes that the consumer goes through when buying then he is more likely to be able to develop communication activities that will effectively influence the consumer to buy a particular brand. A number of simple models have been put forward and by way of explanation these models can be classified into three major types – response hierarchy models, black box models and personal variable models.

Response hierarchy models attempt to predict the sequence of mental stages that the consumer passes through on the way to a purchase. The response hierarchy models are useful in the sense that they attempt to prioritise the communication objectives at various stages of the buying process.

These objectives can be classified into three main areas – cognitive, affective or behavioral. Cognitive objectives are concerned with changing the consumer's attitude to the product as a whole or a specific aspect of the product. Behavioural objectives are concerned with getting the consumer to act in some way (buy the product).

However, these models have some drawbacks, as identified by Smith, *Marketing Communications: An Integrated Approach* (1993). The core model of consumer buying behaviour is most applicable to complex buying behaviour. In most situations, the consumer does not necessarily go through the staged process of information search and evaluation of objectives before the purchase decision. Buyers may also bypass the hierarchy of stages. For example, during the evaluation stage a buyer may go back to the information search stage in order to obtain more information

before making the decision to buy. Communication may need to be adapted in recognition of such factors.

Black Box models are concerned with how people respond to a stimuli. Such models do not attempt to explain the complexities of the customer's thought processes and the mind of the consumer is likened to a 'black box' which cannot be penetrated to find out what is inside. Therefore the models focus on the input or stimulus (for example, advertising) and the response or output (purchase behaviour). Attitudes, for instance are largely seen as a black box. While these models are not perfect models, they do illustrate how important it is to influence buyer's behaviour by conditioning their attitudes.

Personal variable models attempt to penetrate the black box, but they only consider a few variables such as beliefs, attitudes and intentions. Lastly, Complex models of consumer behaviour attempt to take both personal and environmental variables into account in order to produce models that explain the totality of the buying behaviour process. The conceptual model (*Hoyer and MacInnis – Consumer Behaviour – second Edition 2001*) illustrated above demonstrates the totality of both personal (The psychological core) and environmental variables (The consumer's culture) in explaining consumer behaviour.

While these complex models of consumer behaviour have their uses in extending the knowledge of the process of consumer behaviour, they have not been without criticism. The major criticism according to Foxall (in Baker, *The marketing Book*) is that by their very nature, models can only provide a simplification of complex issues. For instance, they assume an unrealistic degree of consumer rationality; the implied decision process is too simplistic and sequential. They also assume that consumers have seemingly infinite capacity for receiving and ordering information, in practice, consumers ignore, forget, distort, misunderstand and make far less use than this of the information with which they are presented. Furthermore, insufficient recognition is

given to the relative importance of different types of decisions. Each decision is treated by comprehensive models as significant and of high involvement, but the reality is very different and by far the vast majority of decisions made by consumers are relatively insignificant and of low involvement such as decisions around beverage consumption. Notwithstanding Foxall's criticisms, this model was applied to the Zimbabwe case in an effort to understand the applicability of these models in fast paced and unstructured environments such as Zimbabwe.

## - CHAPTER THREE -

### 3 METHODOLOGY

The purpose of this section is to explain precisely *what* techniques and methodology were used to meet the objectives of this project, and also to explain *why* they were selected. This section begins by stating the broad aim of the study, the research design before explaining the questionnaire design, the details of the secondary data set used and the methodology employed for this study. The methodology for analysis and interpretation of results has also been detailed. Please note that data interpretation is further explained in the findings section, just before the main findings and analysis

#### 3.1 Broad aim

The broad aim of the study was to answer the research question as to whether different LSMs in Zimbabwean will maintain their beverage purchase and consumption patterns regardless of the country's economic status.

#### 3.2 Research design

The study was quantitative and descriptive rather than exploratory. The notes prepared by Dr David Longbottom for the 2002 MSc in Strategic Management, Marketing Research module Pg 53 inform us that descriptive research is designed to answer specific questions either through testing a hypothesis or developing a theory. According to Churchill (2002) the descriptive study is typically used for determining the frequency with which something occurs or the relationship between two or more variables as is the case in this study. He also states that the typical descriptive study is usually guided by an initial hypothesis. For these reasons, descriptive research has been selected as the most suitable method to answer the specific research

question posed “Can consumers maintain their behavioural patterns for beverages in a volatile environment?”

A literature review prepared in Chapter two also serves as a background to the problem formulation and also serves to enhance understanding of the issues as well as support the research question and research methodology.

A positivist approach to this descriptive research study has been taken, rather than a phenomenological one. Positivism involves having a theory or a hypothesis and then conducting research to prove or disprove it. Saunders (2000) pg 85, purports that if your research philosophy reflects the principles of positivism then you will probably adopt the stance of the natural scientist who prefers working with an observable social reality, assuming the role of an objective analyst. According to Saunders (2002) pg 21, there are several advantages to this approach such as economical collection of large quantities of data, a clear theoretical focus for the research at the outset and easily comparable data. The approach however has certain drawbacks that are accepted, such as the fact that the meanings people attach to social phenomena cannot be discovered. The process can also be very inflexible. Being a quantitative study, a great amount of computer aided analysis, statistical testing and software was required.

A non-probability judgment sample was selected in Zimbabwe. The demographic data for Zimbabwe is shown below. The source of our demographic data is the Zimbabwean Inter-Censal Demographic Survey (ICDS) conducted by the Central Statistical Office (CSO) in 1997. The CSO conducted this survey, in an effort to update 1992 census data. Table 1 below shows the national population figures from the ICDS Zimbabwe 1997, by region and gender.

**TABLE 2: Total Population of Zimbabwe by Gender and Province**

<b>Province</b>	<b>Total Population</b>	<b>Males %</b>	<b>Females %</b>	<b>Total %</b>
<b>Manicaland</b>	1 814 764	47.4	52.6	15.4
<b>Mashonaland Central</b>	1 019 627	48.6	51.4	8.7
<b>Mashonaland East</b>	1 109 547	46.2	53.8	9.4
<b>Mashonaland West</b>	1 255 716	48.4	51.6	10.7
<b>Matabeleland North</b>	683 917	47.9	52.1	5.8
<b>Matabeleland South</b>	632 930	46.3	53.7	5.4
<b>Midlands</b>	1 510 150	47.2	52.8	12.8
<b>Masvingo</b>	1 219 655	46.2	53.8	10.4
<b>Harare</b>	1 871 943	50.3	49.7	15.9
<b>Bulawayo</b>	671 024	49.5	50.5	5.7
<b>Total Zimbabwe</b>	<b>11 789 247</b>	<b>47.9</b>	<b>52.1</b>	<b>100%</b>

From the total population of **11 789 274**, adults aged 15 and above amount to 6 728 775 which is 57% of the total population. This actually shows that Zimbabwe has what is termed a 'young population'. The sampling design involved a multistage probability sample of the Zimbabwean adult population (15 years and older) with a robust sample size of 5000 for each study being achieved.

The study records the status and behaviour of adults and therefore only records data for those 15 years and above. Therefore our universe, is the country population who are fifteen years or older.

The following table shows the breakdown of this population by age and gender according to the ICDS results:

**TABLE 3 Breakdown of the Zimbabwe Population Aged 15 years and above by Age and**

**Gender**

<b>Age-group</b>	<b>Males</b>	<b>Females</b>	<b>Total</b>	<b>%</b>
15-19	730 380	754 275	1 484 654	22.1
20-24	521 360	626 510	1 147 870	17.1
25-29	427 729	460 871	888 600	13
30-39	542 306	666 397	1 208 703	18
40-49	382 936	426 598	809 534	12
50-59	251 953	303 141	555 094	8
60+	310 025	324 293	634 318	9
<b>Total Universe</b>	<b>3 166 689</b>	<b>3 562 085</b>	<b>6 728 774</b>	<b>100%</b>

The same population segment is further broken down by area of residence into the following proportions:

<b>Rural</b>	<b>64%</b>
<b>Urban High Density</b>	<b>31%</b>
<b>Urban Low Density</b>	<b>5%</b>

All the sample data collected randomly for this study, is weighted and projected to the national population of those aged 15 years and above. This data fully represents the universe. It must be noted however that selected tables have been filtered down to



remove respondents who are not relevant to a particular data set. This is called re-basing.

### **3.3 SAMPLING**

A non-probability judgment sample was obtained based on our discretion of our understanding of the relevant characteristic of various LSM consumers. The judgement sampling was chosen, as it is a type of purposive sampling in which the researcher judgmentally selects elements to conform to some criterion. In this case our criterion is LSM3 to LSM10 consumers.

### **3.4 QUESTIONNAIRE DESIGN**

Questionnaires are the most popular data collection method in business studies, and the major types of questionnaires are descriptive and/or analytical. Once a research problem is formulated and the purpose of the study is clearly defined this will determine the type of survey to be undertaken, whether analytical or descriptive. The questionnaire designed for this survey is descriptive as the concern is with how the shopping behavior of LSM3 to LSM10 consumer has evolved over time since Zimbabwe started experiencing an economic downturn. In business studies, descriptive surveys are often used to obtain consumer attitudes towards a certain products and to ascertain views and options of employees in an organization.

The survey information was collected using mostly questionnaires. This was designed with the set objectives in mind and a test run was conducted before the questionnaire was finalized. The questionnaire was made up of two segments, which are as follows:

- **Observation (Inside and Outside)**  
This will include collecting information that the enumerator can observe from outside the store and on products sold in he store as well as Point Of Sale (POS)
- **Interviews**  
The interviews were two pronged

- i) The enumerator interviewed the store keeper/owner for the name of owner, trading hours, where stock is bought, period establishment has been operating, trading future and key customers
- ii) The enumerator interviewed shoppers for their age, residential address, shopped items, shopping trips, reason for shopping trip, average spend (see questionnaire attached).

### **3.5 The Survey**

The data collection exercise ran for 10 days from the 15<sup>th</sup> of August 2003 to the 24<sup>th</sup> of August 2003. A total of 220 Main survey interviews were conducted throughout Zimbabwe. These were conducted face to face with the respondents in retail outlets.

### **3.6 Survey Methodology**

In order to give each consumer in the Zimbabwe urban areas an equal chance of being selected, a multi-stage-stratified probability sampling methodology was applied. Areas were initially stratified into urban and rural. The urban areas were further split into high density and low-density areas. Low-density domestic workers were not captured because of data distortions arising from them reporting the life styles of their employers as theirs.

The 220 interviews were broken down by area in the following manner:

<b>Urban Low</b>	<b>40%</b>
<b>Urban High</b>	<b>60%</b>

There was an over-sampling of Low urban areas because of the greater diversity of urban populations when compared to the generally homogeneous urban high populations. A random sample was utilised whereby primary sampling units (PSUs) were selected randomly. Secondary sampling units (SSUs) were then selected with probability proportional to size i.e. the number of consumers from each PSU.

Respondents in selected areas were selected using the KISH grid method, which is a random method used for the unbiased selection of a respondent.

### **3.7 Reliability Estimates**

All sample surveys are subject to sampling error. Thus our survey was no exemption. Therefore a margin of error should be taken into consideration when reading the tables. The margin of error is the percentage difference between what the results would have been had we interviewed the whole universe rather than a sample of it.

The tables on the following pages will assist in determining the strength and reliability of the data. The two tables enable us to calculate the margin of error for the survey. The first table provides the unweighted sample sizes that were achieved for the various parameters used to cross analyse the data in the Survey. The second table is used to estimate the sampling error for any single result.

### **3.8 How to obtain the margin of error**

Supposing that the overall incidence of consumption of a certain brand, brand X, for people in low-density areas is 41%. From the first table, which shows the actual sample sizes for the survey, we can see that the sample size of people in low-density areas who were interviewed is 40. If we go to the margin of error table the closest rounded sample figure (which is on the left) is 1000.

On the top row we find the penetration closest to 41% and it is noted "60% or 40%". Dropping a vertical line from this point and moving horizontally from the rounded sample size of 1000, the point 3 is found at the intersection. This figure represents the margin of sampling error at the 95% confidence level. Therefore based on the figure 3%, we can be 95% confident that if an actual census of the population in Low Density areas were undertaken, consumption of brand X would fall within the range of 38% and 44%.

**TABLE 4: Actual sample size of the parameters used to cross-analyse the survey data**

PARAMETER		SAMPLE SIZE
<b>TOTAL SAMPLE</b>		<b>220</b>
<b>Age of Respondent:</b>	15- 19 years	39
	20-24 years	49
	25-29 years	5
	30-34 years	24
	35-39 years	19
	40-44 years	14
	45-49 years	12
	50-54 years	09
	55-59 years	06
	60-64 years	06
	65-69 years	04
	70-74 years	03
	75+ years	02
<b>Sex</b>	Male	111
	Female	109
<b>Urban</b>	High Density	92
	Low Density	39
<b>Rural</b>		88
<b>Home Language</b>	Shona	178
	Ndebele	30
	English	07
<b>Living Standard Measure</b>	1	32
	2	49
	3	24
	4	24
	5	13
	6	15
	7	11
	8	06
	9	06
	10	137

**TABLE 5: Margin of error at the 95% confidence level**

Penetration	99%	98%	96%	94%	92%	90%	85%	80%	75%	70%	65%	60%	55%	50%
	OR	OR	OR	OR	OR	OR	OR	OR	OR	OR	OR	OR	OR	OR
	1%	2%	4%	6%	8%	10%	15%	20%	25%	30%	35%	40%	45%	50%
Sample size	%	%	%	%	%	%	%	%	%	%	%	%	%	%
4	3.1	4.3	6.1	7.4	8.4	9.3	11.1	12.4	13.4	14.2	14.8	15.2	15.4	16.0
10	2.2	2.7	3.8	4.7	5.3	5.9	7.1	7.8	8.5	9.0	9.3	9.6	9.8	9.8
20	1.4	1.9	2.7	3.3	3.8	4.2	4.9	5.5	6.0	6.4	6.6	6.8	6.9	6.9
30	1.1	1.6	2.2	2.7	3.1	3.4	4.0	4.5	4.9	5.2	5.4	5.5	5.6	5.7
40	1.0	1.4	1.9	2.3	2.7	2.9	3.5	3.9	4.2	4.5	4.7	4.8	4.9	4.9
50	0.9	1.2	1.7	2.1	2.4	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4
100	0.6	0.9	1.2	1.5	1.7	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1
150	0.5	0.7	1.0	1.2	1.4	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5
200	0.4	0.6	0.9	1.0	1.2	1.3	1.6	1.8	1.9	2.0	2.1	2.1	2.2	2.2
250	0.4	0.5	0.8	0.9	1.1	1.2	1.4	1.6	1.7	1.8	1.9	1.9	2.0	2.0
300	0.4	0.5	0.7	0.8	1.0	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8
350	0.3	0.5	0.6	0.8	0.9	1.0	1.2	1.3	1.4	1.5	1.6	1.6	1.6	1.7
400	0.3	0.4	0.6	0.7	0.8	0.9	1.1	1.2	1.3	1.4	1.5	1.5	1.5	1.5
450	0.3	0.4	0.6	0.7	0.8	0.9	1.0	1.2	1.3	1.3	1.4	1.4	1.5	1.5
500	0.3	0.4	0.5	0.7	0.8	0.8	1.0	1.1	1.2	1.3	1.3	1.4	1.4	1.4

Source: *Research Methods in Business Studies- A Practical guide* By Pervez Ghauri, Kjell Gronhaug & Ivar Kristianslund 1995.

Sufficient intellectual rigour needs to be applied to the testing methodology in order for the results to be meaningful. According to Atkinson a good test should have reliability and validity.

- **Has to discriminate at an acceptable level on category and brand use**
- Sizeability, homogeneity within and heterogeneity between; **Has to define distinct and sizeable groups that are ‘approachable’ by marketers, I.e. with usable media and shopper profiles ie actionable.**
- Measurability - **Has to be easily calculable during a market research interview**
  - *preferably based on mainly observable data*
  - *or at least questions not subject to ‘automatic over claim*
- Accessibility - **Has to be in the public domain and be broadly accepted and therefore become the industry standard**
- **Has to be valid, consistent and reliable**

### 3.9 Reliability

As a general rule, truly scientific statements about the world must be reliable, as regards to reliability, if we are to be able to test a particular hypothesis to see whether or not it sustains the test we need to know that we are subjecting the same hypothesis to exactly the same test to which it was subjected before.

Atkinson pg 530 states that *if a test or method of assessment is reliable it will give reproducible and consistent results.* Reliability is typically assessed by calculating the correlation co-efficient of two sets of scores. For example if a test is given to the same group of people on two occasions and the two sets of scores correlate highly, then the test is said to have test-retest reliability. In this case we have two sets of non-probability samples from the same population collected at the 95% confidence level. Atkins states page 442 that the higher the correlation coefficient the more reliable the measurement tool for market segmentation is. It is important to note that reliability of a test does not always mean the exact replication of data. If there are environmental or societal changes that cause the data to change for the same set of

individuals over time, the test is still reliable if it produces results that are consistent with those changes.

### **3.10 Limitation of the data**

The data from the survey is based on self-reported respondent recall of general and last shop shopping behavior. As with all market research, recall data often exhibits some degree of over claim.

### **3.11 Validity**

Validity is usually discussed in terms of internal and external validity. Internal validity refers to the validity of the findings of a particular study per se or, in other words the extent to which the hypothesis are supported by the available evidence. External validity refers to the generalisability of the findings to other similar situations and contexts.

In order to show the validity of a particular research study, a number of validity issues were investigated

1. Face validity – face validity is a weak form of validity and refers to whether the item in a measuring instrument, say a Life style scale, appear to measure life style. In other words do the items appear logically and conceptually accurate?
2. Content validity – content validity that aims to show the extent to which the items for a particular measuring instrument fully represent the area under study with no omissions. In other words, a consumer behaviour scale must cover fully the content of consumer behaviour, thus a consumer behaviour scale that only incorporates items relating to the psychological core, would not have a high content validity since it would have omitted other important dimensions such as, the consumer's culture that are clearly part of what constitutes consumer behaviour.
3. Construct validity – construct validity that is measured in terms of how well the items selected for the construct (e.g consumer's culture) actually measure the

construct. In other words, how well the factors that are included in particular construct are supported by the available data.

4. Criterion related validity – this can be of 2 forms, concurrent and predictive. Concurrent validity refers to the extent to which the measure is taken by one instrument correlate with the measures taken at the same time by another instrument or measure of a given construct. This should be distinguished from a convergent validity that occurs when one instrument measuring a particular construct is found to be highly correlated with another instrument known to be measuring the same construct. Discriminant validity is the opposite of this in that an instrument with a high degree of discriminant validity would need to be shown to correlate poorly (or not at all) with another instrument designed to measure something entirely different. Another forms of criterion related ability is predictive validity. This refers to the extent to which a particular measure designed to measure say employee propensity to leave actually is effective in predicting actual labour turnover in a specific company.

Atkinson pg 530 also states that reliability assesses the degree to which a test is measuring something whilst validity ensures that the test is measuring what it is intended to measure. A test can have good reliability without validity. In some instances the validity of a test can be assessed by correlating the test score with some external criterion, e.g. inflation, unemployment, GDP per capita, PCE index. According to Atkinson, this correlation is called a validity coefficient. This kind of validity is called criterion or empirical validity. It is true to say that the higher the validity coefficient the more accurate the prediction that can be made from the test results.

There is a third type of validity called construct validity. This is where a researcher is designing a test to measure some concept or construct that is part of a theory such as this case where a questionnaire has been designed via variable or factor analysis, that supports the theory or hypothesis that is being tested that we can create



segments of affluence non-demographically that are reliable and suitable, for target marketing purposes. Borrowing from Atkins theories pg 531kl it is possible to construct validity of a new assessment instrument through the process of research itself. As purported by Atkins studies have been conducted using the new instrument. I now will have to examine the results of these converging studies, as the extent to which the results of these studies are positive will simultaneously validate both the theory and the instrument. Interestingly Atkins pg 531 goes on to state that *often, mixed results suggest ways in which both the theory and the instrument need to be modified.*

Atkins pg 544 presents an argument against consistency in human behavior in a critical discussion. Within the discussion he states that *our preconceived notions of how people behave may lead us to generalize beyond our actual observations.....research shows that when we expect two behaviors to be correlated we tend to see them as correlated even when they are not.*

To take this argument further, it has been my experience whilst dealing with large sets of demographic data sets that demographic criterion and various behaviors do not always correlate in the way in which we expect them to. For example the most expensive beverages are not necessarily bought by the higher income groups, higher educated, or low density dwellers, as we might expect. Atkins pg 694 writings on inferring causality highlight this particular issue and refer to it as attribution problem. Although most sciences involve the discovery of causes and effects it is very difficult if not impossible to gain any distinctiveness about peoples reactions or behaviors when faced with various stimuli and definitely to try to definitively tie down cause and effect scientifically in terms of why individuals or groups of individuals behave in a certain way due to the presence of certain conditions or stimuli, I believe would be an exercise in futility. Numerous elements such as self –schema, attitudes, culture and various types of conditioning affect the way we react to different stimulus and therefore negate the idea of consistency in causality.

### 3.12 Methodology for analysis and interpretation of results

The validity of the segmentation by comparing single logical variables between the ZAMPS 2001 and 2002 data output and LSM calculation will firstly be illustrated. According to Saunders (2000) and Manly (1994) pg 44, with a single variable, the best method of comparing variation in two samples is the *F* test. An alternative is Levene's (1960) test. The idea here is to transform the original data into absolute deviations from the mean and then test for a significant difference between the mean deviations in the two samples using a *t* test. Absolute deviations from the mean are usually used but a more robust test is possible by using absolute deviations from sample medians (Shultz 1983). Bryman (1997) pg 152 recommends the use of a *t* test for this purpose. Churchill (2002) pg 650, also recommends the *t* test but he cautions that the *t* test should be used for a normal distribution whereas most of the ZAMPS data is positively skewed or negatively skewed due to the wealth element. Income and wealth distribution in third world populations is invariably positively skewed with most respondents bunching to the left, and the "haves" featuring in the long tail to the right. However the *t* test also has its limitations in accurately testing large data sets, as it was originally designed to test much smaller samples.

In terms of statistical analysis, two-way Analysis Of Variance (ANOVA) tests were conducted for all data sets. In order to demonstrate the differences and similarities of the two data sets from all the literature reviewed, it appears that the analysis of variance (ANOVA) is the most effective test for the following reasons. The one-way ANOVA test is used to test for equality of population means. Newbold, Saunders et al (2000) and Higgs (1982) are all in agreement that in this test the critical factor is the variability involved in the data. According to Newbold pg 597 "If the variability around the sample means is small compared with the variability among the sample means we would be inclined to doubt the null hypothesis (the null hypothesis states that there are no difference between figures), that the population means are equal. If

however the variability around the sample means is large compared with the variability among them, the evidence against this null hypothesis is rather flimsy.” This being the case, it seems reasonable to expect that an appropriate test will be based on estimates of variance. The general technique employed is referred to as analysis of variance. In the two-way analysis of variance that has been selected, we can obtain information about two factors simultaneously. In this case the test is being performed without replication as the data available is quite simple and only 2 samples are present. Within this test we look at the raw data as being broken down into blocks, where each block cell refers to a particular group-block combination.

The two-way analysis was selected rather than the one-way because although the primary interest of this study lies in the analysis of the differences between the 2001 and 2002 variables, it is suspected that the economic climate has had an effect on the size of the various LSM groups and this could have an impact on the outcome. The two-way ANOVA allows us to include this particular variable as a blocking variable, and look at two factors simultaneously.

In interpreting the ANOVA results we will concentrate on the *P*-value and the *F* results if the null hypothesis  $H_0$  is true then *F* should be nearer 1 (since the means should all be similar, their variability is low). It was found that with an *F* value below 3.18 for these two samples, the null hypothesis is unlikely to be rejected. It is also important to note that the data is being tested at the 95% confidence level. This means that there would only be a 5% chance of the data not replicating exactly. Although data interpretation has already been explained earlier in this chapter, further details about the data interpretation are provided in Chapter 4 with the main findings for the reader's convenience.

### **3.13 Data output**

Saunders (2000) pg 339 gives a detailed guideline chart as to the best way to present different types of quantitative data. He suggests the use of bar graphs and line

graphs for comparisons between 2001 and 2002 data as matched samples trended over time. Data tables and graphs will be prepared that compare and contrast the LSM3 to LSM10 data. Statistical test results will be shown in tabular format. Details of the full ANOVA test results can be found in appendix 2.

## - CHAPTER FOUR -

### 4 MAIN FINDINGS

#### 4.1. Societal Environment

The following section details the findings of this study. Analysis of the findings is presented together with the findings. In order to contextualise the findings the societal environment is discussed briefly, as well as the way in which the data has been interpreted.

There are very real societal constraints when dealing with strategic management of organisations according to Richard Mason and Ian Mitroff, MSc Strategic Management module. With regard to the nature and complexity of real world problems, they state that "social, organisational and political constraints influence the desirable solutions. There is need to systematically doubt available options and employ dialectics".

Although this was stated in terms of general strategic management, it applies directly to all marketing activities including of course consumer behaviour. To go ahead and evaluate consumer behaviour with respect to non alcoholic beverages without taking into account the effect of the societal environment would render this entire research study meaningless. In fact the main reason that affluence or wealth was selected as the base for segmentation is because the distribution and levels of affluence are changing so fast in Zimbabwe today that they need to be understood, measured and tracked over time. The LSM segmentation should act as a peg for demographic, media and product consumption data to be stratified and ultimately for strategic decision making in selecting and targeting specific members of the population. The macro-economic distortions in Zimbabwe has seen the emergence of a new social class made up of consumers in LSM3 -10 as the economy is now skewed towards the

informal with this LSM band taking advantage of the 'chaos' in the economic environment.

### **Societal Environment defined**

The Societal forces are the more general forces that do not directly affect the short-run activities of the organisation, but can influence its long run decisions. eg, Socio-cultural forces, Technological forces, Economic forces, Political, legal forces and competitive forces. In order to contextualise the analysis that will follow comparing LSM3 to LSM10 data, it is important that the reader has an appreciation of the expected changes to the segmentation architecture for LSMs due to the socio-economic and political climate.

Professor Rukuni, The chairman of Kingdom bank in his official statement of July 2002, wrote the following *"Zimbabwe has continued to churn out dreadful macro and socio-economic indicators during the first half of 2002, with no sign of improvement. Widely held expectations of a post-presidential election recovery program through pragmatic political programs never materialised. The economy's Gross Domestic Product (GDP) that had been forecast to fall by 10% this year, is now expected to decline by 11.1 %, cementing a fourth consecutive year of negative growth from a 7.3% decline last year. The confidence of the nation's producers has been severely dented leading to entrenched speculative behaviour and widespread corruption. The political leaders of Zimbabwe are being called upon to grasp the leadership mantle and arrest this decay in the fabric of our society."* This report, as well as many other official and unofficial sources, reflects a badly mauled economy that is in dire need of a sustainable recovery program.

From the interviews conducted with beverage manufacturers, Michael Ndoro, the managing director of Schweppes Zimbabwe echoed, *"Patterns in Zimbabwe beverage industry are that in general due to decline incomes across board and particularly in the lower middle to bottom income groups beverages are considered as*

*such a food supplement. With regards to Cordial market in which Schweppes Zimbabwe participate in, our cordial brands as dilutable provides value for money to the majority of Zimbabwean consumers. In this context we have seen an increase of consumption in our beverages.”*

According to Richard Mason and Lan Mitroff, module slide 18, there are very real societal constraints. With regard to the nature and complexity of real world problems, they state that “*social organisational and political constraints influence the desirable solutions. There is need to systematically doubt available solutions and employ dialectics*” Dialectics can be described as the art of arguing or reasoning according to the Collins dictionary pg133.

#### **4.2 Data interpretation**

In terms of statistical analysis two-way ANOVA tests were conducted for all data sets. In order to demonstrate the differences and similarities of the two data sets, from all the literature reviewed it appears that the two-way analysis of variance (ANOVA) is the most effective test.

##### **4.2.1 Hypothesis testing with ANOVA**

In interpreting the ANOVA results we will concentrate on the *P*-value and the *F* results. If the null hypothesis  $H_0$  is true then *F* should be nearer 1 (since the means should all be similar, their variability is low). It was found that with an *F* value below 3.18 for these two samples, the null hypothesis is unlikely to be rejected. It is also important to note that the data is being tested at the 95% confidence level. This means that there would only be 5% chance of the data not replicating exactly. This being the case, if the *P* values for any result is lower than 0.05, then we must reject the null hypothesis and accept the alternative hypothesis  $H_1$ , that there is a significant difference amongst the means. If it is above 0.05 then we can accept the null

hypothesis. This is because the  $F$  tables give the significant value of  $F$  at the 5% level of 3.18 with 9 degrees of freedom Newbold (table 7 pg 840).

The results on each chart will be interpreted and the data will also be analysed at face value taking into consideration the prevailing societal environment at the time study was conducted. An examination and comparison the variance of the scores within the data sets will be provided

### Key for ANOVA Summary tables

SS	=	Sums of square
df	=	Degrees of freedom
MS	=	Mean squares
F	=	F ratios

NB:  $F$  = there is a special test designed to test whether two variances differ significantly and this is called the  $F$  test (after Fisher) it is formed by dividing the larger variance by the smaller and comparing the ratio obtained, with tables of the  $F$  distribution as explained by Higgs (1982) pg 95.

For the ANOVA tests conducted in this study the hypothesis for all tests is the same. It is important to note that;

- The columns denote the difference in variance between the 2001 AND 2002 data sets.
- The rows denote the differences within the separate data sets, i.e. between the LSM segments within each of the two data sets. follows:

The null hypothesis  $H_0$  is  $F < 3.18$  (which would mean that there is no significant difference in the variation of the means)

The alternative hypothesis  $H_1$  is  $F > 3.18$  (Which would mean that there are significant differences between the variance of the means)



All tests have been conducted at the 95% confidence level or 5% level of significance.

When interpreting the results we would generally wish for the null hypothesis should be accepted for the rows. This would mean that there are no significant differences between the various LSMs.

However for the columns we would wish to reject the null hypothesis in favour of the alternative hypothesis. This result would mean that there are significant differences between the LSM segments proving them to be distinct and homogeneous.

#### **4.3 Overall data comparison**

To begin with let us look at the overall areas of learning. The following are the results of the Research.

# Data Analysis

Figure 4.1

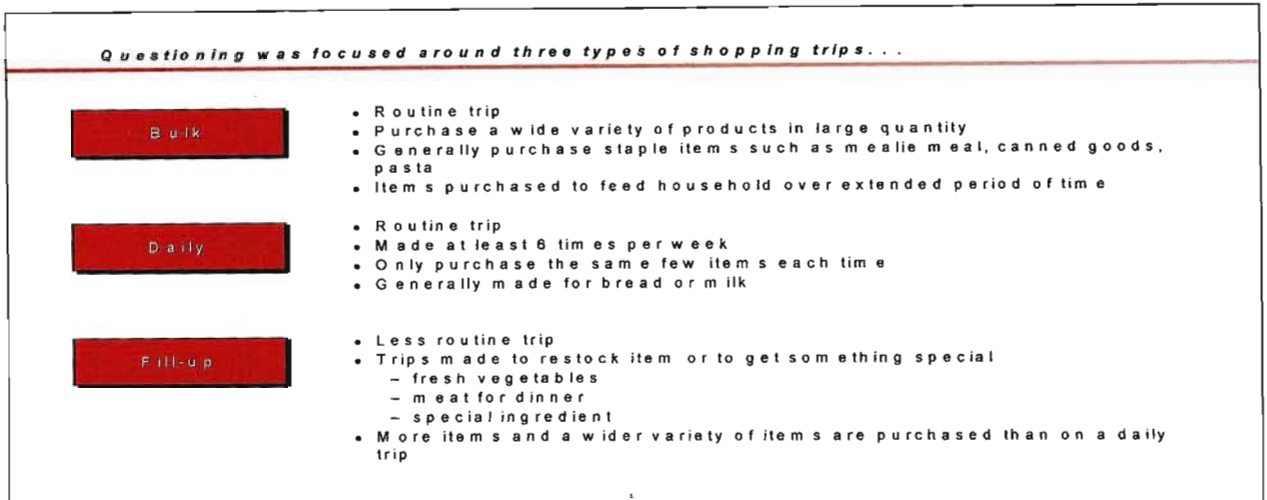
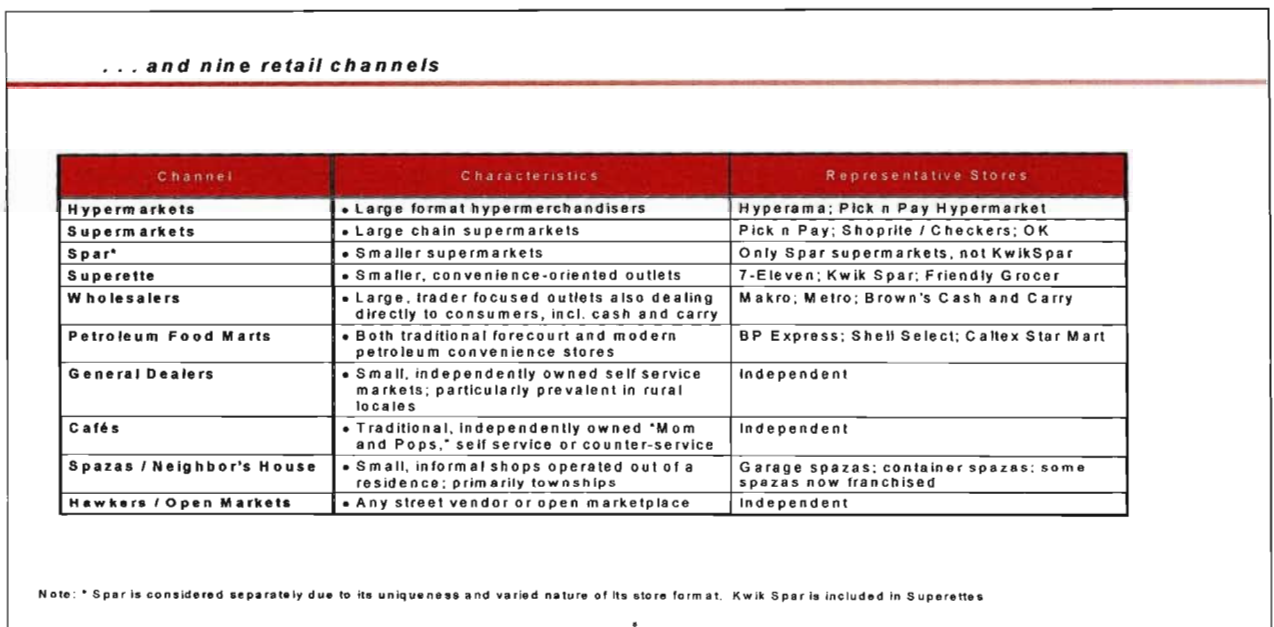
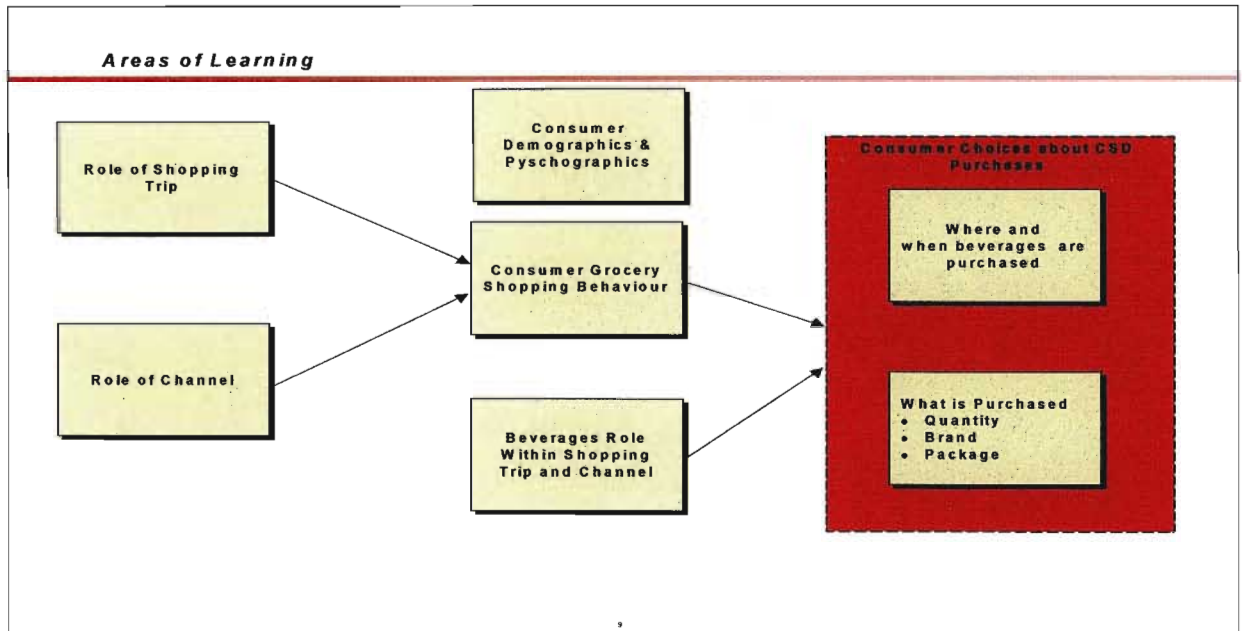


Figure 4.2



**Figure 4.3**



**Figure 4.4**

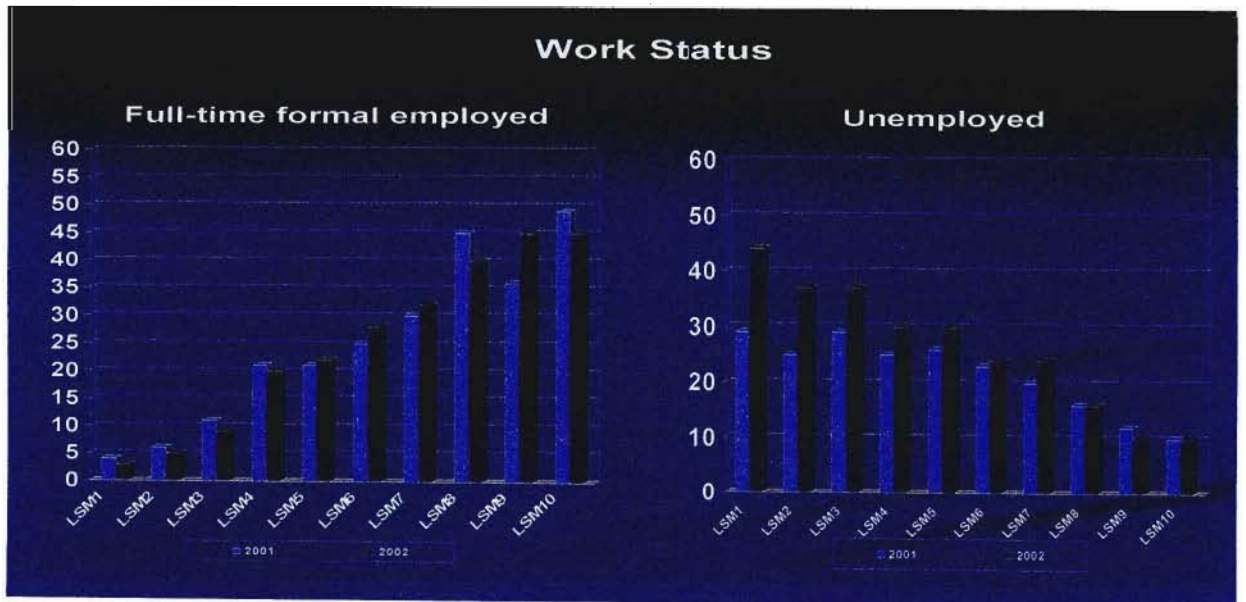


Table 6

ANOVA Full-time formal employment

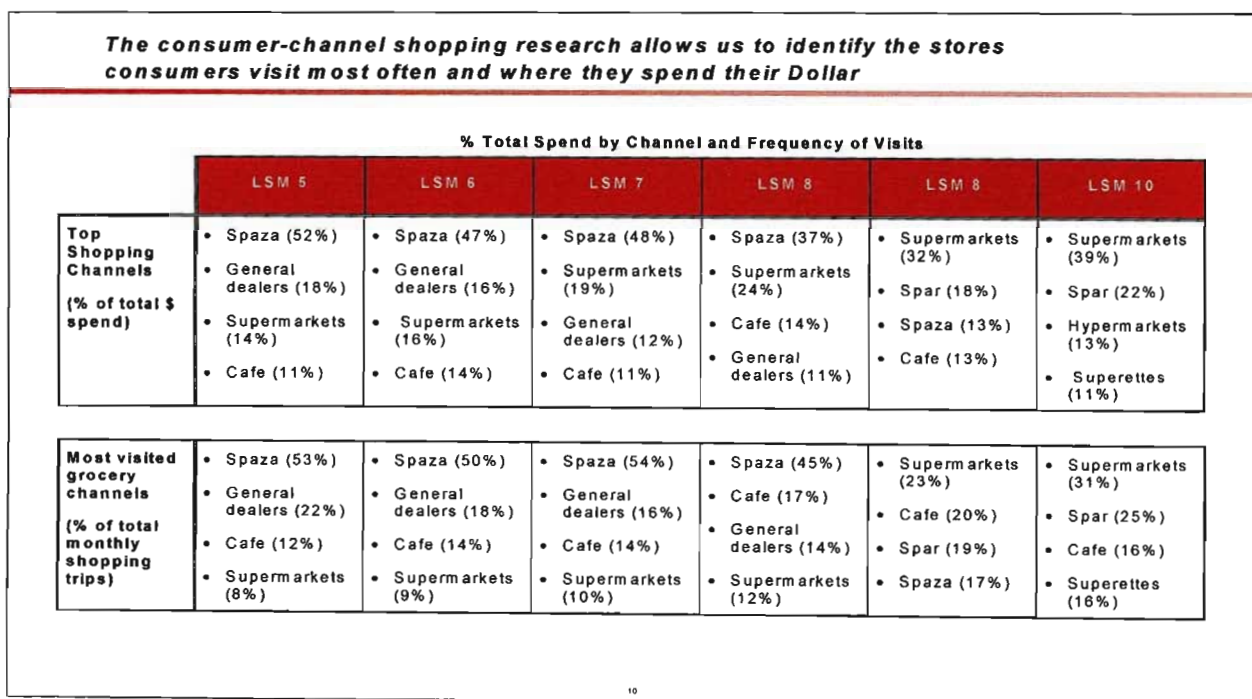
Source of Variation	SS	df	MS	F	P-value	F crit
Rows	0.05	1	0.05	0.006298	0.938482	5.117357
Columns	4337.05	9	481.8944	60.70049	5.55E-07	3.178897
Error	71.45	9	7.938889			
Total	4408.55	19				

Table 6

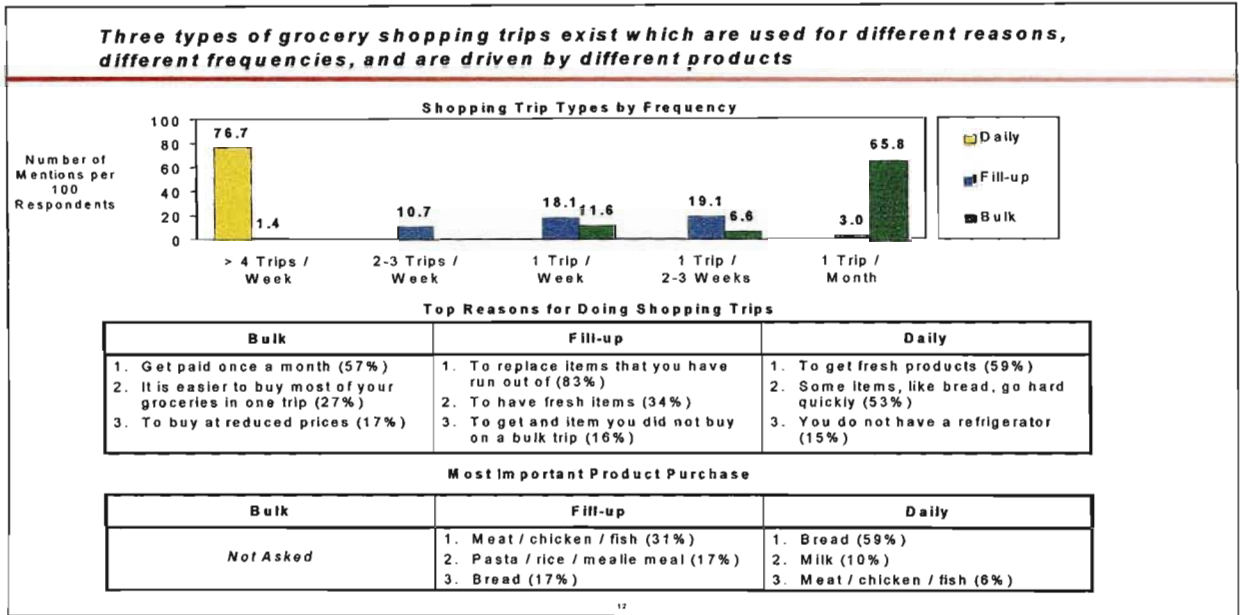
ANOVA Unemployed

Source of Variation	SS	df	MS	F	P-value	F crit
Rows	92.45	1	92.45	7.232073	0.024827	5.117357
Columns	1559.45	9	173.2722	13.55454	0.000316	3.178897
Error	115.05	9	12.78333			

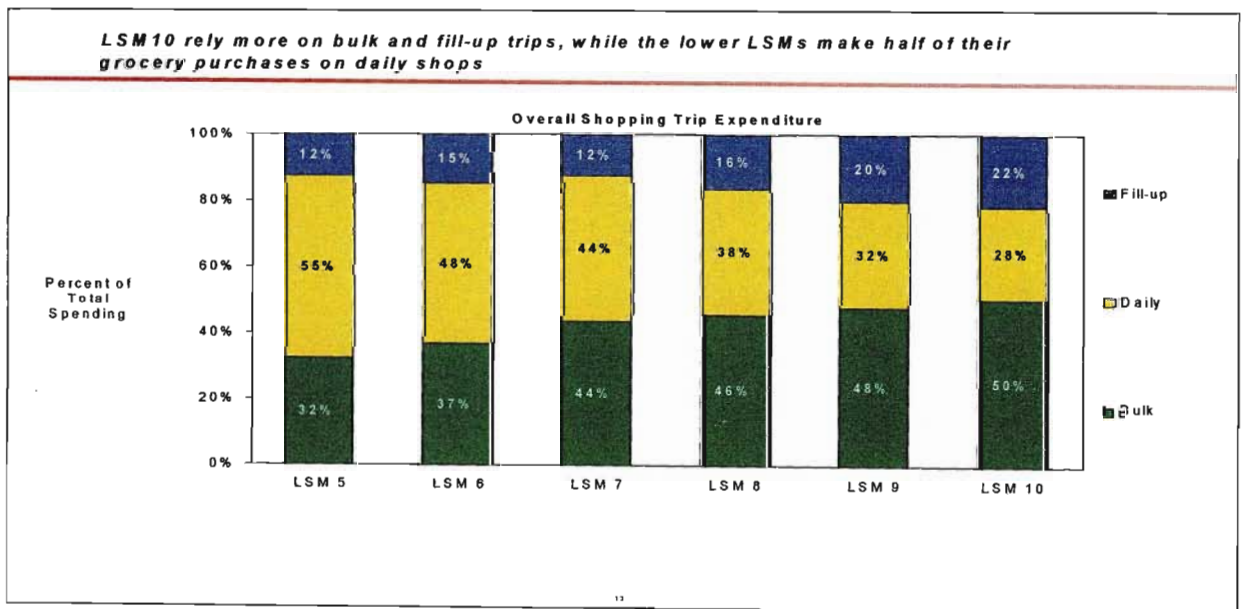
Figure 4.5



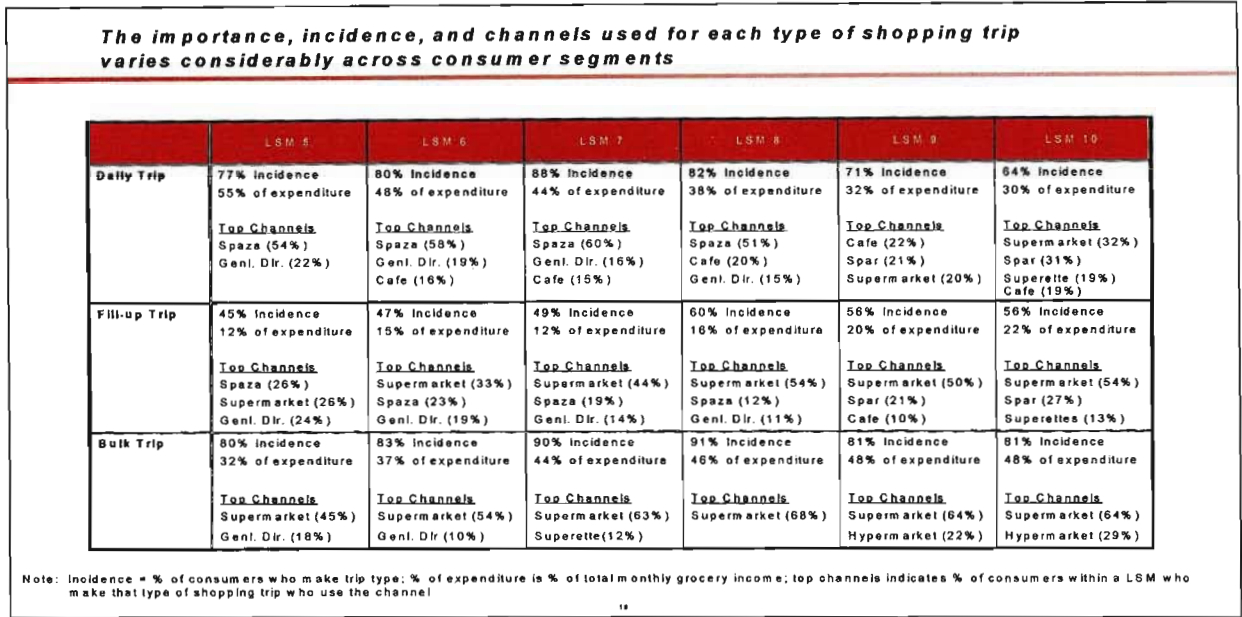
**Figure 4.6**



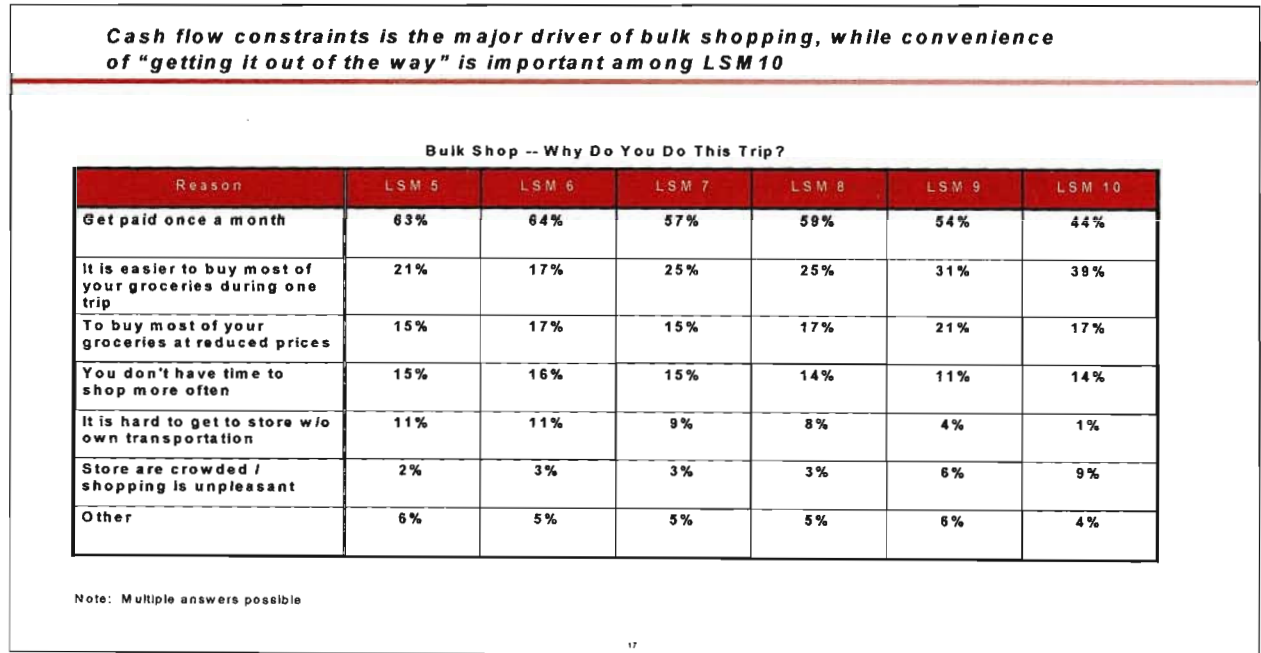
**Figure 4.7**



**Figure 4.8**

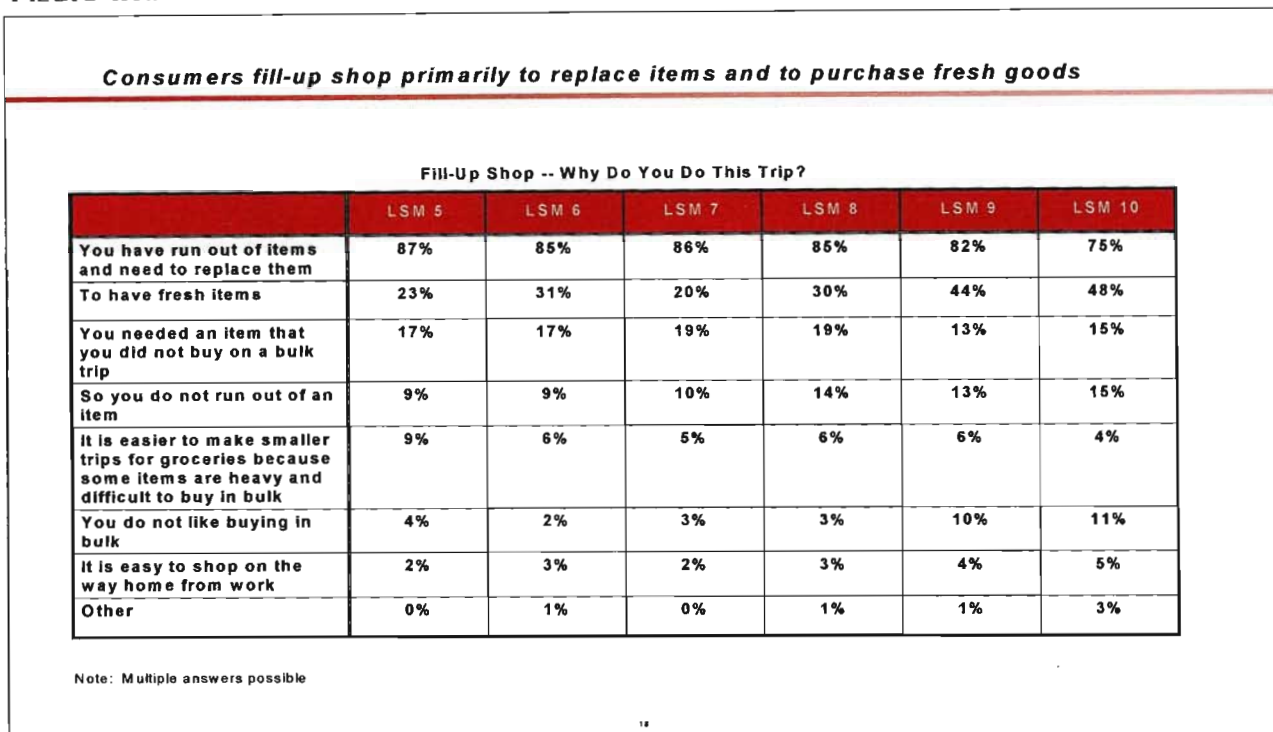


**Figure 4.9**





**Figure 4.10**



**Figure 4.11**

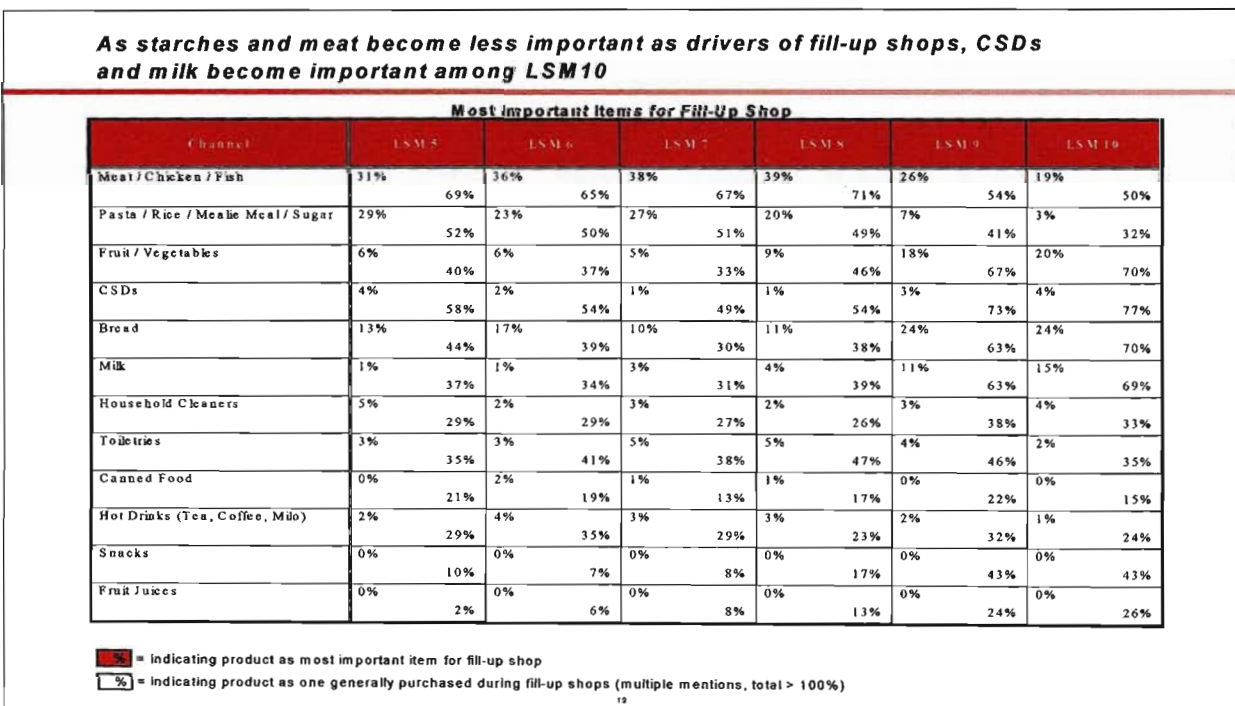


Figure 4.12

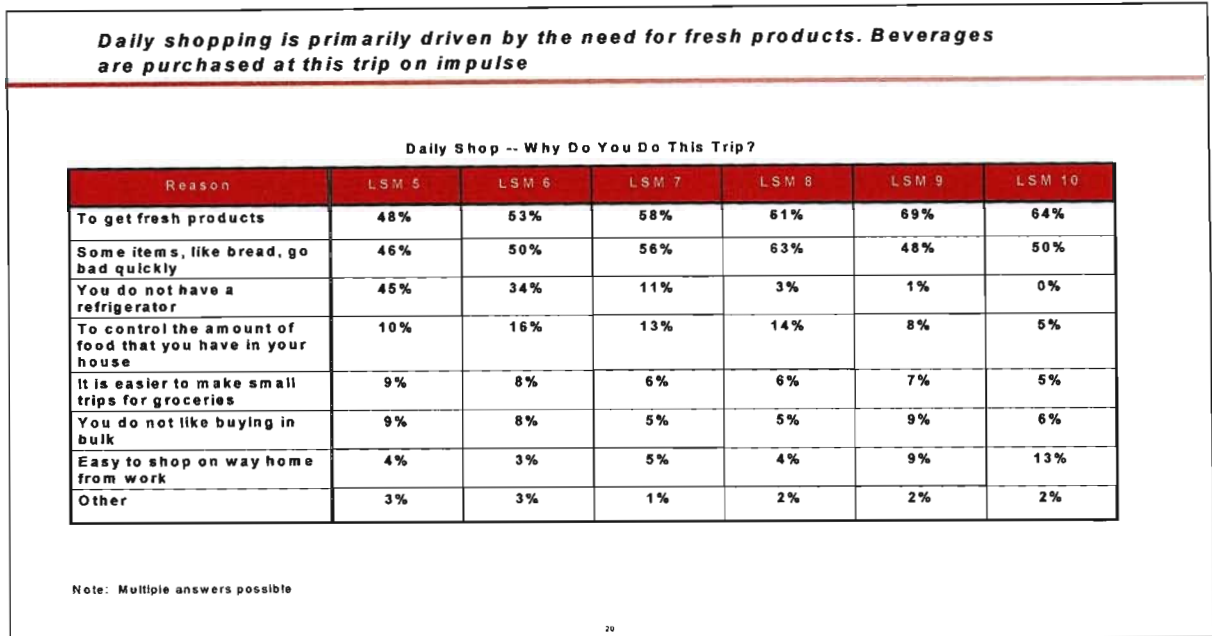


Figure 4.13

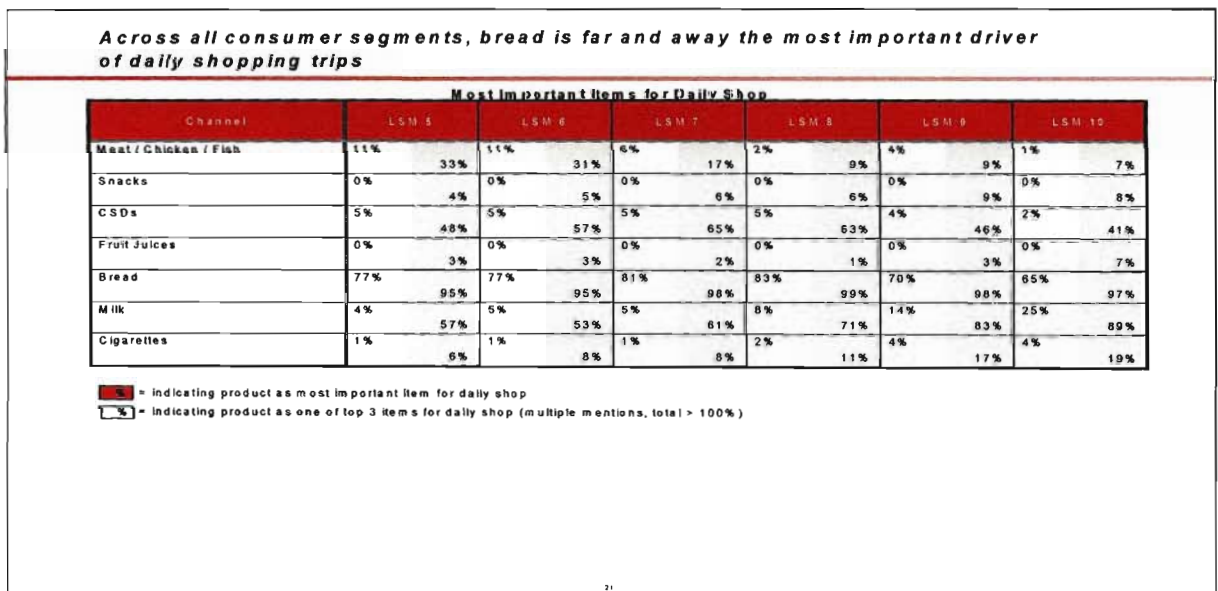




Figure 4.14

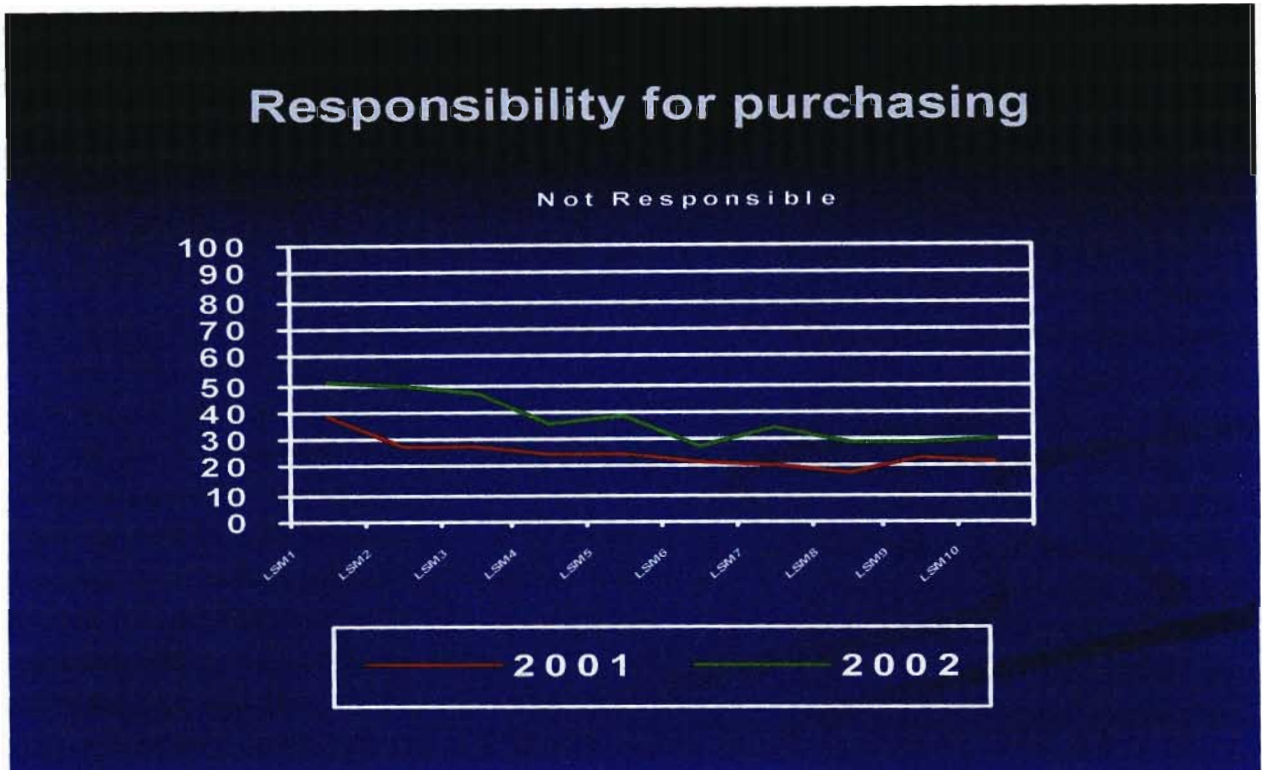
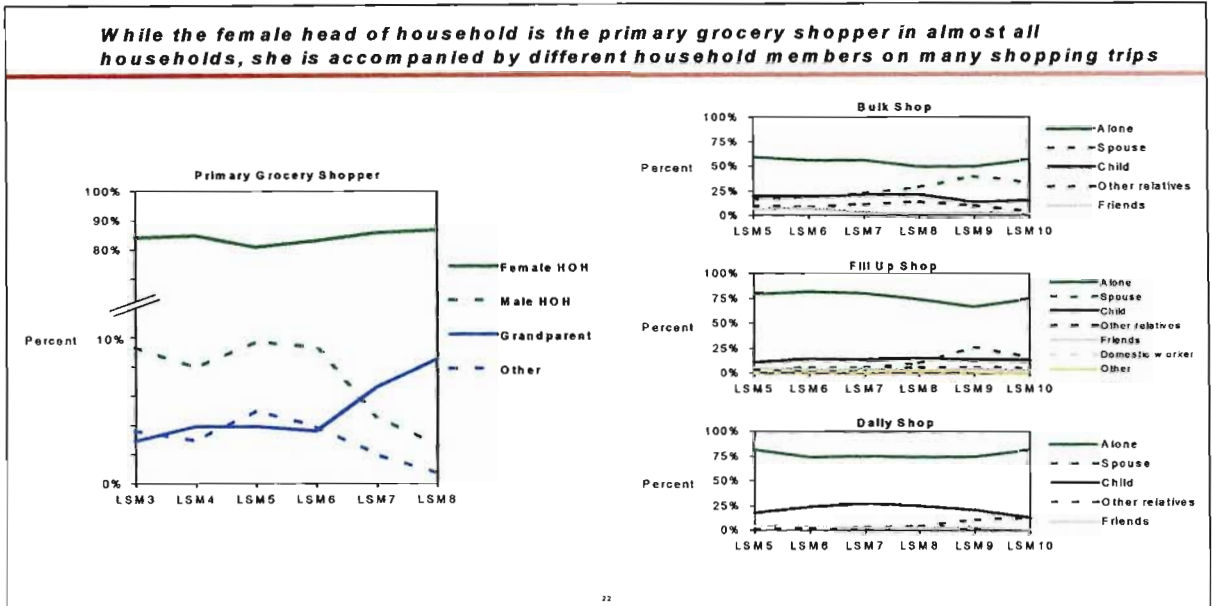


Table 7

		Not responsible for purchasing				
ANOVA	SS	df	MS	F	P-value	F crit
Rows	756.45	1	756.45	59.69356	2.92E-05	5.117357
Columns	856.45	9	95.16111	7.509426	0.003045	3.178897
Error	114.05	9	12.67222			
<b>Total</b>	<b>1726.95</b>	<b>19</b>				

**Figure 4.15**



**Figure 4.16**

**Channel Roles Vary Across LSMs**

**Channel Role by LSM**

	LSM 5	LSM 6	LSM 7	LSM 8	LSM 9	LSM 10
<b>Hypermarkets</b>					• Bulk	• Bulk
<b>Supermarkets</b>	• Bulk • Fill-up	• Bulk • Fill-up	• Bulk • Fill-up	• Bulk • Fill-up	• Bulk • Fill-up • Daily	• Bulk • Fill-up • Daily
<b>Spar</b>					• Fill-up • Daily	• Fill-up • Daily
<b>Superettes</b>					• Fill-up • Daily	• Fill-up • Daily
<b>Cafe</b>		• Daily	• Daily	• Daily	• Fill-up • Daily	• Daily
<b>General Dealers</b>	• Bulk • Fill-up • Daily	• Bulk • Fill-up • Daily	• Fill-up • Daily	• Fill-up • Daily		
<b>Spaza</b>	• Fill-up • Daily	• Fill-up • Daily	• Fill-up • Daily	• Fill-up • Daily	• Daily	

Figure 4.17

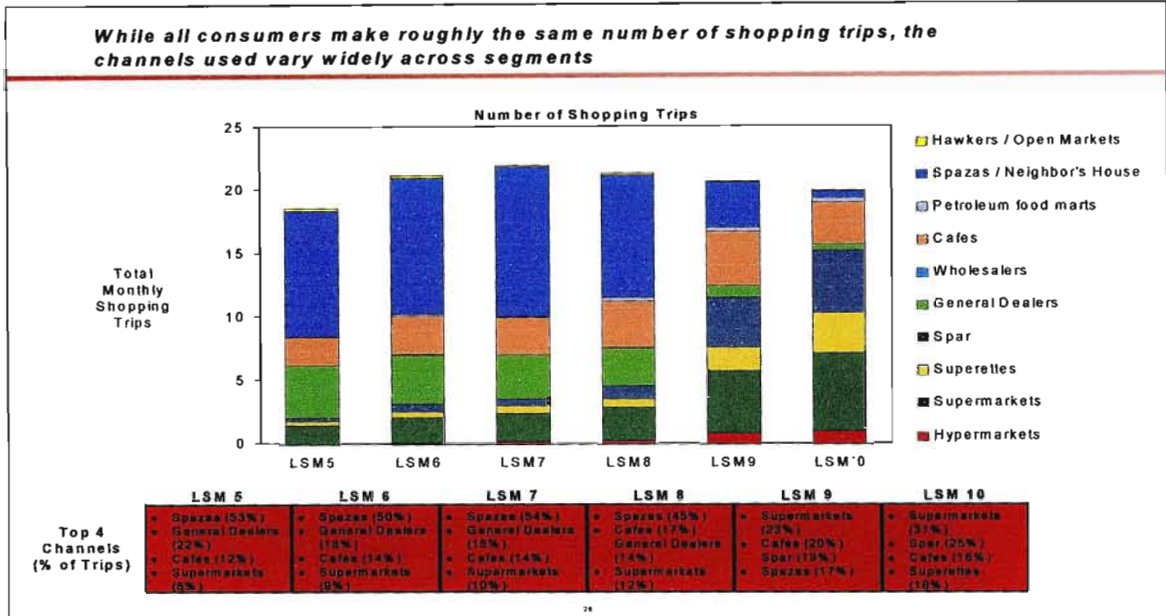


Figure 4.18

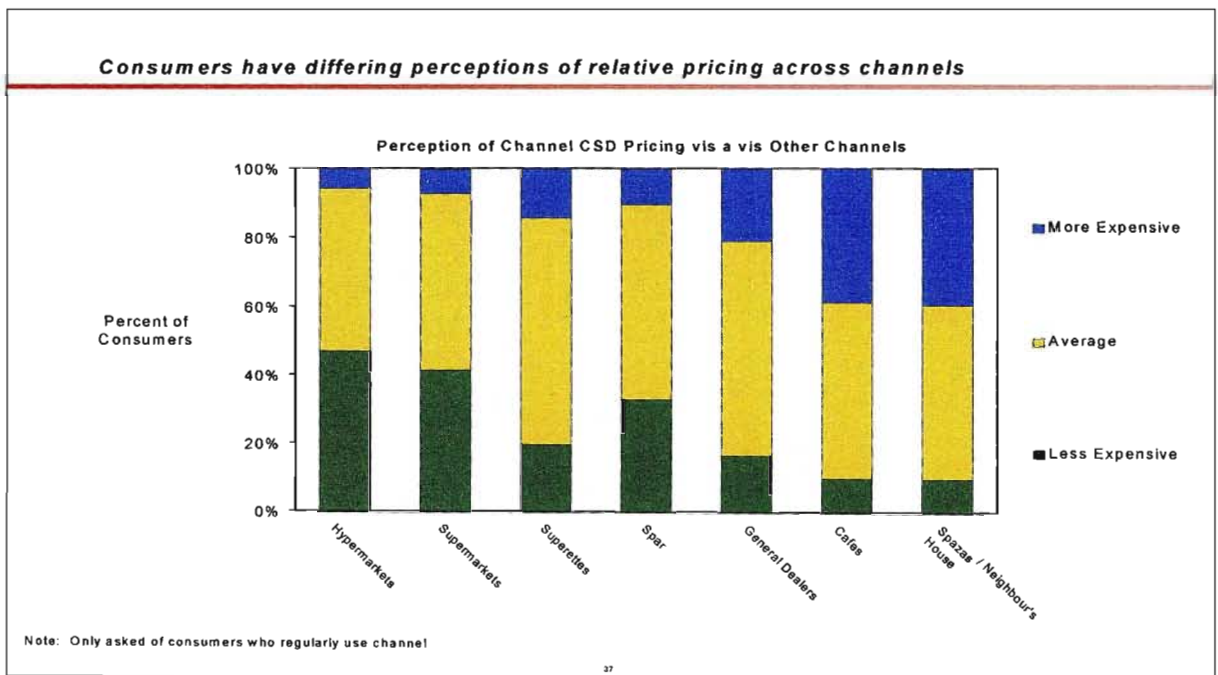


Figure 4.19

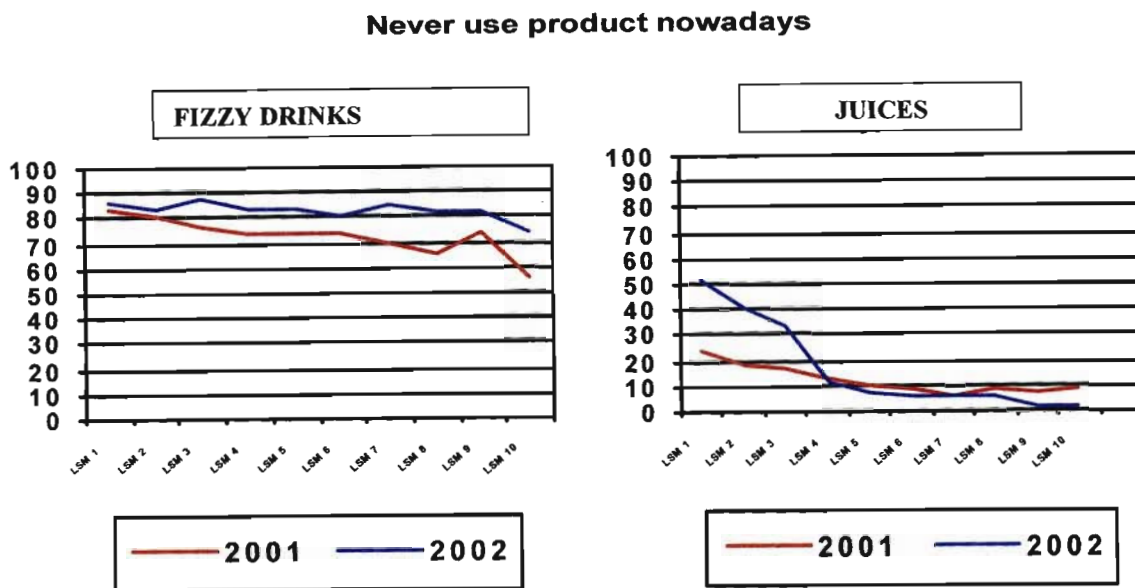


Table 8

ANOVA		Fizzy drinks				
Source of Variation	SS	df	MS	F	P-value	F crit
Rows	0.05	1	0.05	0.000395	0.984572	5.117357
Columns	2024.05	9	224.8944	1.7779	0.202132	3.178897
Error	1138.45	9	126.4944			
Total	3162.55	19				

Accept Ho

#### 4.4 Beverage Category Usership

Figure 4.19 above shows the percentage of the adult population that claimed to never drink the two beverage categories at the time of interviewing. One of the criteria for an effective segmentation is that it should be able to discriminate at the category level. Firstly within the fizzy drinks category there has been a significant drop in

consumption of the category between the two periods. The ANOVA test also shows a P-value below 0.05 therefore denotes a significant difference between the LSM segments. When we look at juices and compare the data with that of fizzy drinks, at face value it illustrates that the drinking of fizzy drinks, although relatively low levels of consumption are shown, is more evenly distributed across the LSM segments. The juices however are definitely much more heavily consumed as we move up the living standard segments. However, due to the fact that almost all of the top five LSMs are consumers of fizzy drinks, “any consumption” falls off sharply to approximately 40% in LSM3. Due to the fact that the ANOVA test is based on averages the results show no significant differences within data sets or between them. This result clearly illustrates the need to understand the basis of the test and to analyse the data trends in order to contextualise the results and avoid misinterpretations.

Figure 4.20

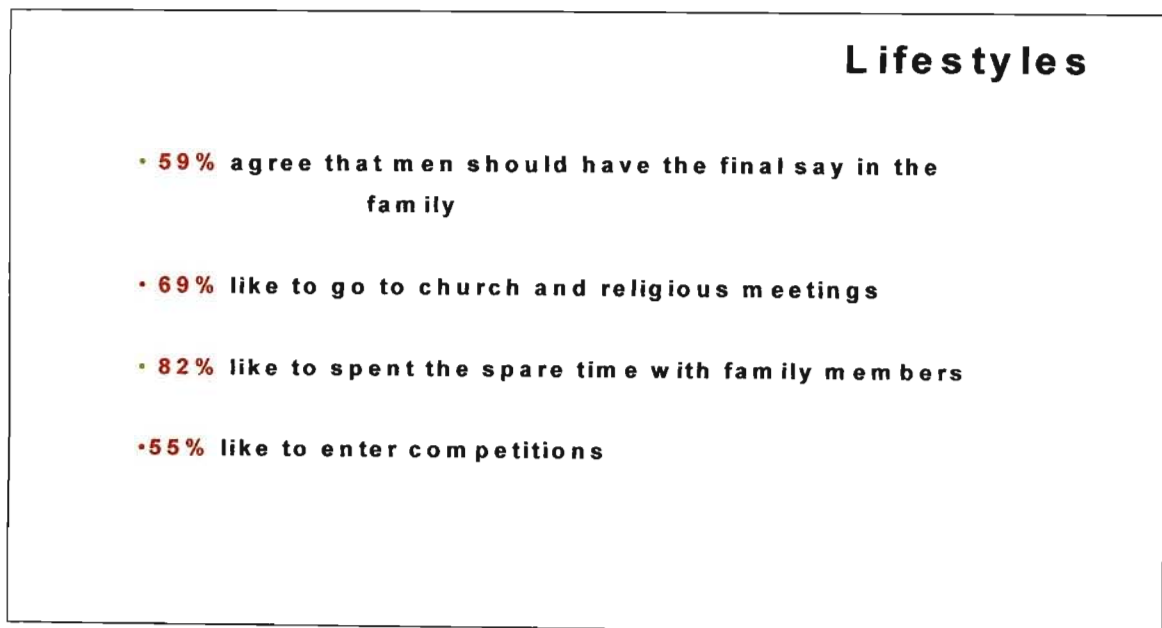


Figure 4.21

OWNERSHIP OF COLOUR TV, RADIO

**Durable Ownership -  
Currently in working order**

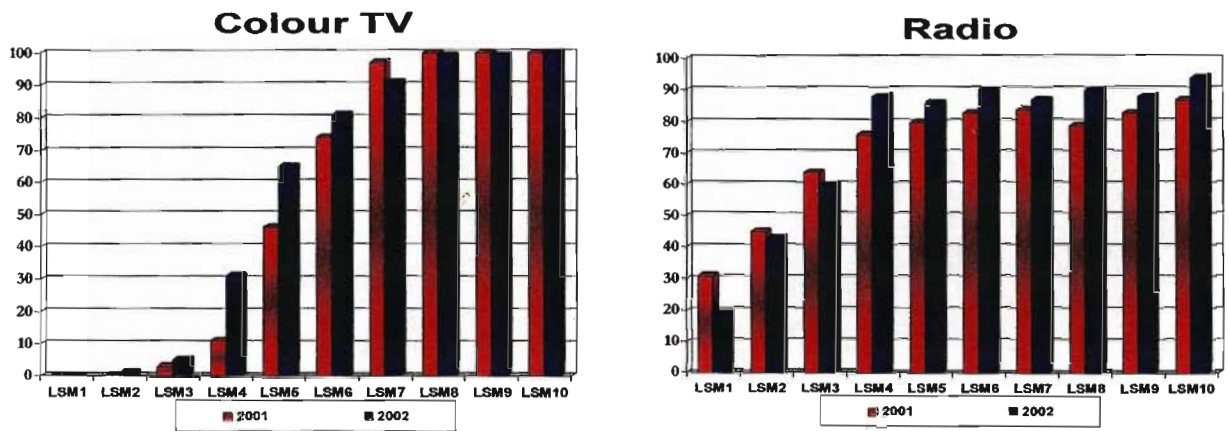


TABLE 9

ANOVA		Colour TV				
Source of Variation	SS	df	MS	F	P-value	F crit
Rows	22.05	1	22.05	1	0.343436	5.117357
Columns	30314.45	9	3368.272	152.7561	9.38E-09	3.178897
Error	198.45	9	22.05			
Total	30534.95	19				

ANOVA		Radio				
Source of Variation	SS	df	MS	F	P-value	F crit
Rows	54.45	1	54.45	2.00799	0.190146	5.117357
Columns	8760.05	9	973.3389	35.89449	5.44E-06	3.178897
Error	244.05	9	27.11667			
Total	9058.55	19				



#### **4.5 Durable Ownership**

Analysis of the four sets of variables shown in figure 4.21 and Table 9 above, uncovers absolute consistency in terms of significant variance across the LSM segments, showing them to be distinct. The data also shows very little difference between 2001 and 2002 data sets for the two variables. The distribution of each data set is also in keeping with what one would reasonably expect and therefore can be said to be reliable.

It is interesting to note that on closer examination the sensitivity of the LSM segmentation becomes even more evident. With reference to figure 4.21 at the beginning of this chapter, that showed the overall comparative data summary, we saw the melt down from LSM 7 downward to LSM 3. If one looks at the way LSM 4 and 5 appear to have more radios than colour TVs it seems reasonable to hypothesise that this may be due to the overall rapid reduction in affluence, where a person that may have been at a higher Living Standard in 2001 say LSM 6 may have fallen on hard times, and may now be at LSM 4 or 5 in 2002. This does not necessarily mean that any demographic data would have changed for this person and that they no longer have certain durables. This clearly illustrates the importance and effectiveness of a composite measure of affluence taking a diverse set of mainly non-demographic.

In relation to theory application, the main findings are as follows:

#### **4.6 Psychological Core**

Figure 4.5 Focuses on identifying the stores consumers visit most often and where they spend their money. The data clearly shows that consumers in LSM3 shops mainly in the Spazas (52%) while LSM10 spend most of their grocery shopping money in supermarkets (39%), hypermarkets (13%) and superettes (11%). Asked

why they prefer to shop in these channels (Figure 4.6), our data reflects the psychological factors influencing their choice of channel.

#### **4.6.1 Motivation**

Their goal is fresh quality grocery food items. Our observation was that the majority of women in LSM10 were unemployed or full time house wives and had lot of time to do shopping. In this case their primary motive is to mingle with other LSM10 shoppers who were also observed to be spending a lot of time in store in areas such as the coffee shop. They spend a lot of their shopping time looking latest or new product items most of which are imported as they were observed making numerous product enquiries during their in-store time. Most of them were well known to the staff members by name.

The data demonstrated the fact that LSM8 to LSM10 consumers go for specific brands that have personal relevance. For instance when they were shopping for Juice, they selected the top well known brands such as Minute Maid, Ceres and Liqui Fruit as opposed to other brands like house brands which were on special.

The other motive is purely an obligatory reason where they need to ensure adequate food supplies in the household and hence the high incidence of bulk shopping in the LSM10 (50% - Figure 4.7). Figure 4.6 points out one of the motives as being easier to buy most of their groceries in a single trip. The bulk is further supplemented by the daily shopping trip at 28% and 22 % for fill up.

#### **4.6.2 Ability**

It was observed that LSM10 consumers have a lot of knowledge with regard to grocery shopping given the time spend enquiring about new products and their level of participation in in-store product sampling activities. 95% of LSM10 shoppers used various modes of payment like credit and debit cards and cheque books. On a daily trip, their average spend was double the average spend for an LSM3 on a daily basis.



LSM3 to 7 were mainly cash constrained due to the current cash shortages that the country is experiencing. Only 10% of the respondents in LSM 5 to 7 had a debit card, credit card or cheque book. Figure 4.7 shows that cash flow constraints was the major driver of bulk shopping for this category while the convenience of getting it out of the way was important among LSM 9 and 10.

#### **4.6.3 Opportunity**

The economic downturn in Zimbabwe has resulted in product shortages emanating from price controls introduced by the government. The implications on shopper behaviour has been adverse with long queues observed outside major shopping outlets. LSM10 consumers were observed and interviewed in order understand the impact of shortages on their shopping behaviour and buying patterns. Whilst other LSMs were observed to be queuing up for these products LSM10 shoppers were given preferential treatment which resulted in them getting more than normal product requirements at any given time (situational involvement). Items like cooking oil which would ordinarily be bought as part of the fill up shopping trip were bought in substantial bulk. Figure 4.5 shows at 50% of the total grocery spending is spend on bulk shopping trips for LSM10 consumers when compared to only 32% for LSM3 and 37% for LSM6 consumers.

#### **4.6.4 Exposure, Attention and Perception**

Due to the amount of time invested by LSM10 consumers on shopping, the degree of exposure to in-store advertising and marketing stimuli is higher compared to other LSM groups. When asked during the survey which media the consumers had access to, LSM 8 to10 consumers mentioned in-store advertising while LSM3-6 did not recall in-store advertising but mentioned access to radio communication Figure 21. LSM10 consumers were noted to spend more time enquiring and sampling new product offerings. Any new changes to the store layout, or to the product or product layout were more noticeable to LSM10 consumers who took a keen interest in whatever developments took place in-store such as gondola end displays. In the survey 86% of

the LSM10 consumers participated in all the key in-store promotions. Most LSM10 consumers were observed to frequent certain points within the store such as the fresh produce section, the imported wine/beverage section and pet food section to mention a few demonstrating selective attention.

#### **4.6.5 Knowledge and Understanding**

In their basket of goods, 98% of the products purchased by LSM10 shoppers were internationally renowned brands which were shelved in the premium brand section within store. For instance, they selected 100% juice brands that were in the category of premium juice in the juice aisle whilst the other unknown brands were in the category of mainstream juices i.e. house brand juices. This demonstrated their deep seeded comprehension of product knowledge and understanding. Well known brands such as Coca-Cola appeared in their shopping basket in favour of other cola brands.

#### **4.6.6 Attitude**

An attitude is an overall evaluation that expresses how much we like an object, issue, person or action. Attitudes are learned and they tend to persist overtime. Our attitude also reflects our overall evaluation of something based on the set of associations linked to it. Thus, we have attitudes towards brand, product categories, acts, people, type of stores, activities and so forth. Our survey reflects that while all consumers make roughly the same number of shopping trips, the channels or type of stores used vary widely across LSM segments. In our findings, LSM10 frequent supermarkets (31%), Spar (25%), cafes (16%) and Superettes (16%) as depicted in Figure 4.8. 96% of LSM10 consumers frequent top end supermarkets such as Bon Marche' and the premium Spar outlets. Less than 5% frequent the General Dealer and Spaza type outlets. Their negative attitude towards General Dealers is driven by the limited product offering in these type of stores. Supermarkets, Cafes and Superettes tend to stock up market brands for starches such as tastic rice and mother nature bread.

#### **4.6.7 Memory and Retrieval**

Consumer memory is a vast personal store house of knowledge about products, services, shopping excursions and consumption experiences. In essence it reflects our prior knowledge. Retrieval is a process of remembering or accessing what we have stored in memory. From the list of brands that LSM10 consumers were asked to recollect, daily usage brands such as Coca-Cola had a higher recall of 93% when compared to less frequently and less known brands such as Always Cola. Brands such as Colgate toothpaste were high ranking with an average score of 86% as opposed to Cleanse toothpaste at 47%. A recollection of the last store visited showed a high rating for Supermarket (Bon Marche' at 77%) as opposed at 3%.

#### **4.7 Consumer's Culture**

As highlighted in the introductory part of this assignment, the consumer's culture plays a significant role in consumer's shopping behaviour. From a cultural perspective, the research looked at consumer social influences and psychographics such as values and life styles.

##### **4.7.1 Social influences**

Fig 4.5 shows that while the female is the head of the household with regard to grocery shopping, she is accompanied by different household members or friends on many shopping trips. It was observed that the accompanying household member normally a child would influence purchase decisions during a shopping trip. Children were recorded to be accompanying the female head of the household in 25% of the daily shopping trips while spouses were rated at 20% of fill-up shopping trips and domestic workers at less than 15%. The purchase behaviour of the female head of the household was observed to be influence by the accompanying child, spouse, relative, friend or domestic worker to varying degrees. For example, children's functional and emotional needs were given significant voice. Kids wanted fun, sweet, great taste and an image that normally comes with the purchase of items such as candy bars at 91%, but mothers who act as gate keepers wanted to balance

children's desires against their desire for a healthy experience. In households with families, consumption is therefore generally driven by the children. Parents may encourage children to consume products that they view as being healthy.

#### **4.7.1 Life Style**

Respondents were asked about their life style versus 12 months ago. The objective of this question was to help us understand whether the consumer behaviour had evolved and how over the past year as the Zimbabwean economy continued to slide further into a recession. The findings showed that the main components of their life style habits today are in contrast to their life styles 12 months ago. 55% of the respondents showed that they like to enter competitions (Fig 4.20). There was a strong family and religious bias at 82% and 59% respectively. Their shopping behaviour reflects their life style and their preference for family take home products such as braai packs, 2Litre Coca-Cola and 1Litre 100% Juice packs topping the list for LSM10 consumers.

The economic down turn has seen the LSM10 consumer looking after the 'extended family' who can no longer afford to meet their own physiological needs. Based on the HIV/AIDS statistics in Zimbabwe, HIV/Aids pandemic is now exacerbating the economic hardships Adding another dimension to the extended family.

The current fuel shortages in Zimbabwe have also had an impact on the social activities of the LSM10 consumer and their shopping behaviours hence the higher incidence of bulk shopping for LSM10. In essence bulk shopping has evolved to become more of 'hoarding'. Most consumers in LSM9 and 10 reported that for most commodities that were in short supply, they had a minimum of six months to a year stocks.

### **4.7.3 Pricing**

Because of the many factors determining consumer behaviour, the findings show that the issue of price is finally underplayed in determining final demand for non alcoholic beverages disputing the general normal commodity behaviour that as price increase, demand goes down. In non-alcoholic beverages as price goes up, demand goes up despite the harsh economic environment in Zimbabwe.

In closing this chapter, it is pertinent to summarise the key findings. Data analysis uncovered consistency in terms of significant variance across the LSM segments, showing them to be distinct. The data also showed no significant difference between 2001 and 2002 data sets for all variables except from unemployment and a few others directly related to the economic situation such as consumption of fizzy drinks. The distribution of each data set was also in keeping with what one would reasonably expect and therefore can be said to be reliable.

## - CHAPTER FIVE -

### 5. CONCLUSION AND RECOMMENDATIONS

#### 5.1 Conclusion

In conclusion the implications of the above evaluated facts on Zimbabwe beverage marketers and their organizations will now be discussed. It has been found that segmentation has a long history in marketing. It starts with the notion that a company cannot be all things to all customers, but must treat them differently, based on knowing what a customer wants and can afford, and a company's ability to profitably deliver it. Effective segmentations enable companies to allocate investment resources to target customers that will be most attracted to offers. Success is judged on how well the firm acquires and retains profitable customers.

Based on these findings it is empirically concluded that the LSM3 to LSM10 consumer shopping behaviour has evolved since Zimbabwe started experiencing an economic down turn. The initial hypothesis, that LSM3 to LSM10 consumers will always maintain their shopping behaviour regardless of the country's economic status is nullified as false by the research findings. It is evident that higher LSMs consumers are not income constraint judging by the number of consumers who have credit card but it is also evident that LSM8 to LSM10 shopper behaviour has been affected the economic status of this country (Zimbabwe) where fuel shortages will limit the consumer shopping trips while shortages of basic necessities and other key products used by LSM8 to LSM10 consumers have resulted in shift in the stocking patterns of these items signifying a change in their shopping behaviour of these products.

The findings also reflect that the psychological and cultural factors have been shaped by the prevailing economic and social environment. Clearly the psychological factors such as the motive for shopping groceries have changed from just being obligatory to circumstantial due to the abnormalities in the economic environment. As highlighted

in the data analysis certain products have moved from the fill-up shopping trip to bulk shopping as more of a contingency e.g. cooking oil and sugar supplies which ordinarily would be bought to meet the month's requirements are now being stocked up to last for 6-12months based on availability. Interestingly, most non alcoholic beverages, CSDs in particular have also been elevated to bulk shopping as consumers in higher LSMs endeavour to hedge themselves against inflation and shortages. Even when the consumer does not really need the product, it is purchased for psychological reasons where the consumers believes that anything in short supply must be hoarded to avert any potential stock outs. Culturally, life styles have changed in line with the changes taking place in the socio-economic environment. This has affected the shopping behaviour of LSM10 consumers who now have to buy products that they never used before to accommodate the extended family. They now have to buy mealie-meal for example to cushion their workers from the economic hardships. Their mobility is also limited due to fuel shortages hence they now spend more time at home with their families.

## **5.2 Recommendations**

In view of the objectives that were laid out for this research, the following recommendations to marketers in Zimbabwe have been made.

From the findings of this research study the following recommendations are also offered;

- Research is required to further interrogate the total beverage industry in terms of its ability to survive under such operating conditions. This study can also form the basis of more advanced research involving more qualitative aspects of consumer behaviour.

- There is need to extend this study to at least countries experiencing similar macro-economic distortions particularly is Southern Africa. Marketers are selling global brands and therefore will require a global segmentation tool.

### **5.2.1 Product Development**

Products can be developed to appeal to LSM8 to LSM10 consumers to cater for their at home consumption. Based on the data more than 80% of their purchase were for at home type products. Focus should be on multi-serve rather than single-serve packages.

### **5.2.2 Promotions**

Given the fact that 55% of LSM10 consumers participate in promotions and that the female head of the family is mostly accompanied by someone on a shopping trip, there is opportunity to create promotions targeted at these purchase influencers.

### **5.2.3 In-store Activation**

While LSM8 to LSM10 consumers are no longer income constrained, they remain conscious of what they spend and often are value seekers. The shopping experience is a pivotal part of the purchase decision. In many cases retailing is like theatre; that is, the consumer's evaluation of stores and products may depend upon the type of performance he or she witnesses. This evaluation can be influenced by the actors (salespeople), the setting (the store environment) and props (store displays). A store image, like a brand personality, is determined by a number of factors, such as perceived convenience, sophistication, knowledgeability of salespeople and so on. With increasing competition from non-store alternatives, the creation of a positive shopping experience has never been more important.

Since many purchase decisions are not made until the time the consumer is actually in the store, point-of-purchase (POP) stimuli are very important sales tools. These include product samples, elaborate package displays, place-based media and in-



store promotional materials such as shelf talkers. POP stimuli are particularly useful in stimulating impulse buying, where a consumer yields to a sudden urge for a product. In-store activation such as display building and attractive and appealing isle displays will have a significant impact on their shopper behaviour.

#### **5.2.4 Distribution**

Due to shortage of fuel, there is an opportunity for beverage suppliers/manufacturers to set up stock points within close proximity to consumers and have their products within arms reach of desire given the fact that most beverages are consumed on impulse. These distribution channels could be located for instance every 100m in all the residential areas. To address the cash shortages, there is need to consider the coupon system where these could be made available through the banks for purchase of beverages.

#### **5.2.5 Pricing**

One of the objectives of this study was to evaluate non-alcoholic beverage consumption patterns in Zimbabwe in order to formulate strategies for ensuring business viability. While the research findings show that non-alcoholic beverages are basic complements in the basic food market in Zimbabwe. Low income workers and middle income workers can not afford a full meal at lunch time and mainly rely on combination meals of coke and a bun for example. Juices are however prestige value products in Zimbabwe. It is therefore strongly recommended that beverage manufacturers continue to take price increases in line with inflation movements. This pricing strategy will ensure business viability because any price increase below inflation will result in loss in margins and hence a threat to business survival.

#### **5.2.6 Communication strategy**

The objective was to measure media consumption patterns and how they have shifted over time in order to formulate communication strategies that will enable marketers in this industry to have a wider reach to their target market. The research

shows that In-store communication proved to be effective among LSM 9 and 10 consumers as they spend more time than other LSMs on a shopping trip. The implication on marketers is that they need to develop up-market point of sale targeted at LSM 9 and 10 consumers bearing in mind that these consumers are not income constrained due to use of credit card facilities. While there has not been significant shift in media consumption patterns across all LSMs between 2002 and 2003, it is also clear that the lower LSMs rely more on radio communication channel as noted in the findings. To this end, it is strongly recommended that radio communication preferably in vernacular language be used as the primary communication vehicle for lower LSMs while Point-Of-sale advertising be used to target upper LSMs particularly for top end beverages such as 100% Juices. The literacy levels at the top end of the market are high and therefore POP serves as silent sales reps in-store.

### **5.2.7 Market Development**

It is also recommended that the beverage manufactures consider exporting some of their products in order to earn the much needed foreign currency. This will ensure consistent supply of imported strategic inputs. However, because a consumer's culture exerts such a big influence on his or her lifestyle choices, marketers of beverages must learn as much as possible about differences in cultural norms and preferences when marketing new products and when marketing in more than one country. One important issue is the extent to which marketing strategies must be tailored to each culture rather than standardized across cultures. Followers of an etic perspective believe that the same universal messages will be appreciated by people in many cultures. Believers in an emic perspective argue that individual cultures are too unique to permit such standardization; marketers must instead adapt their approaches to be consistent with local values and practices. Attempts at global marketing have met with mixed success; in many cases this approach is more likely to work if the messages appeal to basic values and/or if the target markets consist of consumers who are more internationally rather than locally oriented.

New perspectives on the family life cycle, which focus on how people's needs change as they move through different stages in their lives, should force marketers to consider more seriously such consumer segments as divorcees and childless couples when they develop targeting strategies. Families must be understood in terms of their decision-making dynamics. Spouses in particular have different priorities and exert varying amounts of influence in terms of effort and power. Children are also increasingly influential during a widening range of purchase decisions. To this end, communication strategies should also target this influential group.

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## APPENDICES

### QUESTIONNAIRE

Good day Madam/Sir

My name is ....., an MBA student with the University of Natal. I am undertaking a research on consumer behaviour variables and I am requesting your cooperation in answering the following questions. Kindly be assured that the information you provide will be treated with the strictest confidence.

Please tick appropriate box where appropriate

1. Gender 

M	<input type="checkbox"/>	F	<input type="checkbox"/>
---	--------------------------	---	--------------------------
  
2. Age Group 

16-24	25-34	35-49	50+
-------	-------	-------	-----
  
3. Marital Status 

Single	Married	Divorced	Widowed
--------	---------	----------	---------
  
4. No. Of Dependents .....
  
5. Occupation .....
  
6. Salary range (mth) 

800-1.2m	1.3-1.6m	1.7-2m	2.1+
----------	----------	--------	------
  
7. Other income ..... source .....
  
8. Average Income spent on  
Grocery Items   
Accounts payable

**7. Area of residence**

- low density**
- medium density**
- high density**

- 8. Residential status**
- owned**
  - rented**
  - with parents**

**16. Vehicle ownership and type .....**

**17. Rank the following values in terms of their importance to you**

- Self Respect**
- Warm relationships with others**
- Sense of accomplishment**
- Self Fulfillment**
- Fun & Enjoyment in life**
- Excitement**
- Sense of belonging**
- Being well respected**
- Security**

**10. Preferred shopping area**

Hypermarket

Supermarket

Spar

Usherette

General dealer

Café

Tuck shop

**11. Reasons for doing shopping trip**

bulk

fill-up

daily

Comments .....

**12. Most important product purchase (list 10) .....**

.....

**13. Which outlet last shopped at? .....**

**14. Shopping trip by frequency**

- daily
- fill-up
- Bulk

**15. Overall shopping trip expenditure .....**

**16. What is the percentage of shopping trips Resulting in non alcoholic beverage purchase?.....**

**17. What is the percentage of shopping trips Resulting in beverage (CSD,juice,water e.t.c) purchase last year?.....**

**18. How often do you consume/use a non-alcoholic beverage?**

- Regularly
- Occasionally
- Rarely
- Never

**19. How often did you consume a non-alcoholic beverage last year?**

**Regularly**

**Occasionally**

**Rarely**

**Never**

**20. If consumption frequency has changed what is the reason for consuming less or for consuming more**

.....  
.....  
.....  
.....

**21. At which occasion do you normally consume a non alcoholic beverage  
E.g. Lunchtime, when thirsty, break fast?.....**

**22. Why do you not purchase more non alcoholic beverages?  
For at home consumption?.....**

**23. Does price influence your purchase decision for beverage purchase?  
.....**

**24. Most important items for :  
Fill-up shopping .....**  
.....

**Bulk shopping** .....

.....

**Daily shopping** .....

.....

**25. Which media of communication do you have access to?**

**radio**



**television**



**print media (newspaper, magazines e.t.c.)**



**in-store**



**26. Which media of communication did you have access to last year?**

**radio**



**television**



**print media (newspaper, magazines e.t.c.)**



**in-store**



**27. How often do you have access to the above media?**

.....

**28. Which of the above media is your favourite?**

.....

**Thank you very much for your co-operation.**

## Field Experiences

Respondents found the questionnaire to be user friendly because for the first time the data

sheet and questionnaire and been combined into one survey instrument.

- The new design of the questionnaire improved interviewing time.
- Some areas, however, were inaccessible because of political tension
- Our team of interviewers in spite of the difficulties was thus extra careful and tactful in conducting these interviews and managed to rise to the challenge even completing marginally more than the required sample.
- Respondents in urban high areas were more welcoming than respondents from urban low areas.

## Terms And Definitions Used

The following are explanations of some of the terms and definitions used as defined in the survey.

**Household** A group of one or more people who eat together at least once a day and buy food as a unit.

**Home language** The language which respondents mainly converse in at home.



**Table 60**  
**[Section K2]:Product Usage**  
**Base :All Respondents**  
**Questionnaire Output**

Base	Area					Home Language							
	Rural	Total Urban	High density	Low density		English	Shona	Ndebele	Other				
Ready-to-drink drinks	Regularly used		1,662,660	792,726	869,934	174,526	284,433	205,504	128,263	205,059	316,295	231,923	116,658
		Col %	25%	25%	24%	24%	30%	28%	17%	27%	29%	26%	14%
		Row %	100%	48%	52%	10%	17%	12%	8%	12%	19%	14%	7%
	Occasionally used		1,780,383	805,637	974,746	200,032	272,054	194,349	139,204	214,465	316,338	249,945	193,999
		Col %	26%	25%	27%	27%	29%	26%	19%	28%	29%	28%	24%
		Row %	100%	45%	55%	11%	15%	11%	8%	12%	18%	14%	11%
	Rarely used		1,714,449	801,120	913,329	178,943	215,823	196,994	209,360	199,760	279,632	231,269	202,668
		Col %	25%	25%	26%	25%	23%	26%	28%	26%	26%	26%	25%
		Row %	100%	47%	53%	10%	13%	11%	12%	12%	16%	13%	12%
	Never used		1,571,285	767,206	804,080	176,879	176,780	147,433	266,114	134,991	175,117	192,582	301,390
		Col %	23%	24%	23%	24%	19%	20%	36%	18%	16%	21%	37%
		Row %	100%	49%	51%	11%	11%	9%	17%	9%	11%	12%	19%
Usage: Squashes & syrups	Regularly used		1,454,345	658,636	795,709	131,243	236,577	174,474	116,341	156,521	302,932	222,962	113,294
		Col %	22%	21%	22%	18%	25%	23%	16%	21%	28%	25%	14%
		Row %	100%	45%	55%	9%	16%	12%	8%	11%	21%	15%	8%
	Occasionally used		1,771,951	909,492	862,459	181,566	308,206	234,275	185,445	185,822	303,525	223,619	149,493
		Col %	26%	29%	24%	25%	32%	31%	25%	25%	28%	25%	18%
		Row %	100%	51%	49%	10%	17%	13%	10%	10%	17%	13%	8%
	Rarely used		1,778,505	785,211	993,294	236,252	206,519	161,686	180,754	222,715	261,099	244,903	264,578
		Col %	26%	25%	28%	32%	22%	22%	24%	30%	24%	27%	32%
		Row %	100%	44%	56%	13%	12%	9%	10%	13%	15%	14%	15%
	Never used		1,723,977	813,350	910,627	181,318	197,787	173,844	260,400	189,217	219,826	214,234	287,351
		Col %	26%	26%	26%	25%	21%	23%	35%	25%	20%	24%	35%
		Row %	100%	47%	53%	11%	11%	10%	15%	11%	13%	12%	17%
Usage: Fizzy drinks	Regularly used		1,344,919	662,688	682,231	128,336	259,419	166,819	108,113	166,014	246,199	187,705	82,313
		Col %	20%	21%	19%	18%	27%	22%	15%	22%	23%	21%	10%
		Row %	100%	49%	51%	10%	19%	12%	8%	12%	18%	14%	6%
	Occasionally used		1,642,793	815,624	827,169	209,202	253,399	198,976	154,047	199,633	286,076	212,147	129,314
		Col %	24%	26%	23%	29%	27%	27%	21%	26%	26%	23%	16%
		Row %	100%	50%	50%	13%	15%	12%	9%	12%	17%	13%	8%
	Rarely used		1,560,363	707,885	852,477	161,149	194,230	187,290	165,216	193,771	224,755	225,263	208,689
		Col %	23%	22%	24%	22%	20%	25%	22%	26%	21%	25%	26%
		Row %	100%	45%	55%	10%	12%	12%	11%	12%	14%	14%	13%
	Never used		2,180,703	980,492	1,200,212	231,692	242,041	191,194	315,564	194,857	330,352	280,603	394,399
		Col %	32%	31%	34%	32%	26%	26%	42%	26%	30%	31%	48%
		Row %	100%	45%	55%	11%	11%	9%	14%	9%	15%	13%	18%

**TABLE 39**  
**[SECTION k2] PRODUCT USAGE**  
**QUESTIONNAIRE**  
**BASE : ALL RESPONDENTS**

Base ('000)	Count	Base ('000)	Male			Female			Area			Language			
			10 - 12yrs	13 - 14yrs	15 - 17yrs	10 - 12yrs	13 - 14yrs	15 - 17yrs	Rural	High Density	Low Density	English	Shona	Ndebele	Others
		2,776	524	356	487	548	373	488	2,040	633	103	18	2,305	359	94

Media consumption	Radio	Count	410	74	49	80	70	46	92	122	232	56	11	336	53	11
		COL %	15%	14%	14%	16%	13%	12%	19%	6%	37%	55%	61%	15%	15%	11%
		ROW %	100%	18%	12%	19%	17%	11%	22%	30%	57%	14%	3%	82%	13%	3%
	Television	Count	520	85	61	103	103	80	88	304	186	30	6	391	113	11
		COL %	19%	16%	17%	21%	19%	21%	18%	15%	29%	29%	31%	17%	31%	11%
		ROW %	100%	16%	12%	20%	20%	15%	17%	58%	36%	6%	1%	75%	22%	2%
	Print	Count	690	126	100	114	126	90	133	544	135	11	1	524	128	36
		COL %	25%	24%	28%	24%	23%	24%	27%	27%	21%	11%	6%	23%	36%	39%
		ROW %	100%	18%	15%	17%	18%	13%	19%	79%	20%	2%	0%	76%	19%	5%
	In-store	Count	1,156	239	145	189	249	157	176	1,071	80	5	0	1,053	66	36
		COL %	42%	46%	41%	39%	45%	42%	36%	52%	13%	5%	2%	46%	18%	39%
		ROW %	100%	21%	13%	16%	22%	14%	15%	93%	7%	0%	0%	91%	6%	3%

Reasons For Shopping	Fill-up Shopping	Count	260	35	31	74	31	27	63	64	146	51	10	225	25	
		COL %	9%	7%	9%	15%	6%	7%	13%	3%	23%	49%	54%	10%	7%	
		ROW %	100%	13%	12%	28%	12%	10%	24%	25%	56%	19%	4%	87%	10%	
	Bulk Shopping	Count	304	66	30	54	49	40	65	103	173	28	3	258	33	10
		COL %	11%	13%	8%	11%	9%	11%	13%	5%	27%	27%	19%	11%	9%	10%
		ROW %	100%	22%	10%	18%	16%	13%	22%	34%	57%	9%	1%	85%	11%	3%
	Daily Shopping	Count	486	100	59	104	94	54	75	321	148	18	4	390	76	17
		COL %	18%	19%	17%	21%	17%	14%	15%	16%	23%	17%	20%	17%	21%	18%
		ROW %	100%	21%	12%	21%	19%	11%	15%	66%	30%	4%	1%	80%	16%	3%

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