

# Passing the Torch: Intergenerational Influences as a Source of Brand Equity

In today's competitive battleground, the concept of brand equity has proved to be an important source of strategic insights for marketers. However, one potentially valuable source of brand equity—the operation of intergenerational influences—has generally been overlooked in the marketing literature. This article reports the findings of two studies that show intergenerational impacts on brand equity to be persistent and powerful across an array of consumer packaged goods. However, as a strategic challenge, these effects seem to apply strongly for some brands but not for others—they are selective. In Study 1, the authors use parallel surveys of mother–daughter dyads to isolate and quantify intergenerational impacts, and the surveys reveal a differential range of effects at both the product category and the brand level. In Study 2, the authors use interpretivist methods to delve more deeply into these effects—the forms they take, the way they have developed, and factors that sustain or disrupt them. On the basis of these findings, the authors identify implications for managers and future research needs. Overall, intergenerational influences are a real marketplace phenomenon and a factor that merits much closer attention from marketing strategists who are interested in brand equity issues.

**T**he topic of brand equity has emerged as a central concept in marketing over the past 20 years, raising questions about how to create positive brand images, extend brands into new categories, and build customer loyalty (e.g., Aaker 1996; Aaker and Joachimstahler 2000; Keller 1998). Much has been learned about sources of brand equity as well as its many benefits for a firm and its customers. However, one interesting and potentially powerful contributor—the concept of intergenerational (IG) influence—has generally been overlooked. The purpose of this article is to examine the linkage of IG influences and brand equity. Is this phenomenon a real factor in the marketplace? How substantial is it, and for which consumer goods does it work best? Are certain brands benefiting from this influence whereas others are not? (To the extent that some marketers have been differentially capitalizing on IG effects, they have been adding to their brand's sales, profits, health, and vitality at little or no cost.) More broadly, what exactly are IG influences, how do they come about, and how do they operate? In this article, we present evidence on these questions, drawn from two distinct studies.

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## Background on IG Influences and Brand Equity

Broadly construed, IG influence refers to the within-family transmission of information, beliefs, and resources from one generation to the next. It is a fundamental mechanism by which culture is sustained over time. Its key elements are embedded within socialization theory.

### *Roots in Socialization Theory*

As an area of inquiry, socialization has a long tradition in sociology and cultural anthropology as well as social learning, developmental, and personality theories in psychology (Levine 1969; Peterson and Rollins 1987). Socialization itself is defined as the process through which people develop specific patterns of social behavior (Ziegler and Child 1969) or the process by which people learn the social roles and behaviors they need to participate effectively in society (Brim 1968). Socialization helps society function by reinforcing particular beliefs, traditions, and values. It also helps people develop their personal identities and assume new roles as they move through their life cycles. Although socialization is a life-long process, childhood and adolescence are particularly crucial times. During childhood, the socialization process focuses not only on the present but also on roles and behaviors that will be needed in the future (McNeal 1987). The family is the first and typically the most powerful socialization agent; parents and other family members serve as channels of information, sources of social pressure, and support for one another. As a family develops, it creates a distinct lifestyle, pattern of decision making, and style of interacting (Sillars 1995). Children have continuous opportunities to learn and

eventually to internalize the beliefs, attitudes, and values they have observed, accepting these as the norm (Sears 1983).

### **Basic Findings on IG Influences**

Intergenerational research on political and social behavior shows that many forms of influence are transmitted from parents to their children, including political affiliation, religious values, achievement orientation, and gender and racial attitudes. Levels of parent-child consensus vary considerably, being highest within religious and political arenas; lowest for lifestyles; and generally substantial for topics that are concrete, visible, and salient (e.g., Hoge, Petrillo, and Smith 1982; Troll and Bengston 1979). Over time, effects decline; the greatest erosion occurs during the first few years after the young adult leaves home, and then there is a leveling off by the late 20s or early 30s. Thus, IG impacts can endure well into adulthood (e.g., Beck and Jennings 1991; Niemi and Jennings 1991; Whitbeck and Gecas 1988). "Reciprocal socialization," in which children influence their parents, is also studied in this research stream.

Relatively little direct research attention has been given to IG influence in consumer research, though its presence is recognized in early work on family decision making and the family life cycle (e.g., Davis 1976; Wells and Gubar 1966). Relevant research is also present in the literature on consumer socialization, defined as "the processes by which young people acquire skills, knowledge and attitudes relevant to their functioning in the marketplace" (Ward 1974, p. 2). Consumer socialization research has studied the roles of family, peers, and mass media in teaching children about consumption, the impact of parenting style, and the way parents and children interact in making household purchase decisions (e.g., Beatty and Talpade 1994; Carlson and Grossbart 1988; John 1999; Moschis 1987; Palan and Wilkes 1997).

In the early 1970s, IG research was introduced into the study of consumer behavior. From Hill (1970) to Obermiller and Spangenburg (2000), writers have supported the proposition that these effects are significant, interesting, and potentially important in the marketplace. The core empirical research base consists of only some ten articles, and several of these appear in conference proceedings. An interesting and wide set of topics has been studied. The effects of IG can reach impressive magnitudes: For example, Woodson, Childers, and Winn's (1976) study of auto insurance observed that 62% of men in their 20s reported that their insurance company had also supplied coverage to their fathers, and even at age 50 almost 20% met this criterion. Furthermore, Hill's (1970; cf. Miller 1975) longitudinal study finds that financial planning skill levels are transmitted across three generations, particularly among families that are poor financial managers. Arndt (1971, 1972) studied agreement between college students and their parents on dimensions of innovativeness, opinion leadership, and loyalty proneness. Moore and Lutz (1988) uncovered shared marketplace beliefs and choice rules (see also Carlson et al. 1994) and noted greater preference similarity associated with products that are more visible to children in the home.

Heckler, Childers, and Arunachalam (1989) assessed perceived purchase similarities and observed stronger impacts for convenience than for shopping goods. Childers and Rao (1992) assessed reference group effects and pointed out that a family's impact will differ from that of peers depending on whether a product is publicly or privately consumed. Olsen (1993, 1995) supplemented the prior survey approach in this area by introducing interpretive methods in her study of brand loyalty transfers between generations. Most recently, Obermiller and Spangenburg (2000) noted linkages between family members on skepticism toward advertising.

In summary, theory suggests that family influences constitute a powerful socializing agent in children's lives, and prior research results provide good reason to believe that IG effects are at work. However, current knowledge about consumer IG influence is grounded in a relatively small research base, a number of research issues remain to be addressed, and further evidence is needed on several key topics. Prominent among these is the matter of IG contributions to a brand's equity in the marketplace.

### **Ties to Brand Equity**

A basic theme in discussions of brand equity is that it represents the added value that accrues to a product as a result of marketing investment and effort (e.g., Aaker 1991; Farquhar 1989; Srivastava and Shocker 1991). Keller's (1998) customer-based brand equity framework identifies a brand's meaning as the key to creating equity. Although IG influences have not explicitly been noted thus far in the brand equity literature, they deserve consideration as a force that develops such meaning in consumers' minds. Consider the number of opportunities family members have, year after year, to jointly consume, shop for, and comment on favored brands, thereby influencing children's brand associations.

Keller's (1998) framework also stresses that meaningful differences among brands derive from brand associations that are unique, favorable, and strong. Theoretically, family interactions are likely to produce high levels on these exact properties. Associations that tie loved ones to a brand bring a unique element. Favorable associations are probable, because IG influences are likely strongest for brands that have provided satisfaction for the household over time. Meanwhile, strong associations result from both personal relevance and consistent information over time. Thus, when a child's attitude about a brand, consumption occasion, or store is formed within the context of daily family life, it can exhibit meaningful characteristics that will sustain it across time.

Finally, Keller's framework points out that firms enjoy a number of brand equity benefits related to growth and profits that ensue from increased customer loyalty levels. The possibility of extending loyalties from one generation to the next is an added benefit that has not yet been well recognized. Each year, new cohorts of potentially brand-loyal consumers go out on their own, continuing to use brands they have been socialized to use at home (Wilkie 1994). Overall, then, the issue of IG influences appears to offer considerable potential for marketers.

This potential likely differs by substantive domain, however, because previous research has shown that IG is partially a function of specific product category or marketplace characteristics. For example, Childers and Rao (1992) report stronger IG impacts for private goods than for those consumed in public (and note that culture may moderate observed levels). Also, Heckler, Childers, and Arunachalam (1989) observe stronger IG preference effects for convenience goods than for shopping goods. Within the packaged goods domain, Moore and Lutz (1988) find stronger IG impacts associated with in-home visibility (when the product is consumed in its original packaging rather than not—e.g., catsup versus canned peas). Each of these studies shows that product category features can affect IG levels. However, none of these studies reports findings for individual product categories (findings are reported only for product types—e.g., convenience versus shopping goods). Furthermore, no study to date has examined IG influences for individual brands.

In this project, we examine IG influences in a domain in which issues of brand equity are extremely important—consumer packaged goods. Here, consumer purchases are made in a highly competitive setting, with frequent new product introductions and substantial promotional activity to encourage brand-switching behavior (Kahn and McAlister 1997). These products are inexpensive and frequently purchased: Trial and brand switching are easy to undertake. Still, many packaged goods meet the basic criteria—having a relatively long life cycle, being used by households with children, providing satisfaction over time—that researchers have identified as important for IG effects to emerge (e.g., Moore and Berchmans 1996; Shah and Mittal 1997; Woodson, Childers, and Winn 1976).

To examine these potentials, we conducted two studies using different methods. In Study 1, we used survey methods to isolate, quantify, and test for IG effects, first for 24 consumer packaged goods categories and then for individual brands in each category. In Study 2, we turned to interpretive methods to delve more deeply into the nature of IG effects. Each study investigated multiple ways in which IG may be operating in this domain. Triangulating across research methods enabled us to probe different aspects of the IG phenomenon, providing a richer perspective than that obtained through a single approach (Denzin 1989; Lutz 1991).

## Study 1: Identifying IG Influences for Products and Brands

### Overview and Method

Our specific purpose for Study 1 was to determine whether and how IG influences are related to brand equity in the packaged goods marketplace. In planning the project, it was clear that a complex analytical approach would be required. We accordingly developed a framework based on four broad expectations:

•*Expectation 1: Intergenerational impacts are at work across a spectrum of consumer behavior. Impacts range from brand*

effects to product category effects to store preferences, marketplace orientations, and broader lifestyles. To appreciate brand equity issues fully, we need to identify and partial out some broader impacts. Here, we examined IG impacts on product nonuse.

•*Expectation 2: Intergenerational impacts can be measured at different stages of the consumer decision process. The “hierarchy of effects” (Lavidge and Steiner 1961) provides a useful framework for assessing levels of IG impacts in the marketplace. Here, we focused on IG impacts on consumers’ awareness, consideration sets, and brand preferences.*

•*Expectation 3: Intergenerational influences exist within a tumultuous, differentiated marketplace; various forces affect levels of IG impact. These include differences in product susceptibility to the formation of IG influences and marketplace forces operating to either sustain or disrupt IG impacts in young adulthood. Here, we examined whether observed IG levels were affected by several measurable marketplace factors.*

•*Expectation 4: Not all brands within a product category are equally likely to benefit from IG influences; certain brands may receive notably high levels of loyalty and support. Our analysis sought to isolate such differences in IG effects for individual brands.*

In Study 1, we conducted parallel surveys of 102 mothers and 102 daughters, each mother–daughter pair constituting a dyad for analysis. Our decision to focus on mothers and daughters was based on research indicating that adolescents and mothers influence one another’s purchases more than adolescents and fathers do, that maternal influence is particularly strong for household products, and that women tend to exhibit stronger brand involvements than men (Foxman, Tansuhaj, and Ekstrom 1989; Guest 1964; Olsen 1995). We recruited the daughters from an introductory marketing course at a large Southeastern public university, with the proviso that they must currently live off campus and shop for groceries. We developed two similar questionnaires, one for each member of the dyad. Each participant was asked to indicate whether she used each of 24 product categories (listed in Table 1) and then to list the brand she most preferred (by free recall), as well as additional brands she “seriously considers” when purchasing.<sup>1</sup> We then asked participants to report independently on their partner’s (i.e., mother or daughter) product usage and brand preference in each product category. Students completed their question-

<sup>1</sup>In a preliminary study, 76 parent–young adult pairs provided separate brand preference listings for 120 packaged goods categories (including foods, personal care, and cleaning products) listed in the DDB/Needham Worldwide Lifestyle survey. Examination of parent–child agreement showed considerable variation across product categories, and results generally appeared to be robust, which increased confidence that IG effects would exist within this domain. Because of the multiple levels of detailed analysis desired for the present study, we reduced the list to 24 categories. This product selection process was judgmental but provided representation from a range of dyad-matching scores from the preliminary study—high, moderate, and low—to allow exploration of other factors (e.g., dominant brand, number of brands, product usage) that might mask valid IG effects at the brand level.

naires and provided their mothers' names and addresses for the mailing of a parallel survey and cover letter that explained the project. Both daughters and mothers were alerted to the requirement that they were not to communi-

cate about survey responses until all forms were returned, and all participants agreed. All 102 parent questionnaires were returned within three weeks of mailing, which indicated a high degree of parental interest and involvement.

**TABLE 1**  
**Study 1: IG Effects for Selected Brands**

Product Category and Exact Brand Preference Match <sup>a</sup>	High-IG Impact		
	Key Brands: High Score and Significant <sup>b</sup>	Brands with Potential <sup>c</sup>	Low or No Impact (Illustrative Brands) <sup>d</sup>
Soup	76% <i>Campbell's 84%</i>	Progresso 40%	(All others)
Catsup	65 <i>Heinz 80</i>		Hunts*15, Dei Monte 0
Facial tissue	55 <i>Kleenex 67, Puffs 48</i>		(All others)
Peanut butter	53 <i>Peter Pan 67, Jif 59, Skippy 48</i>		(All others)
Mayonnaise	51 <i>Miracle Whip 59, Kraft 51, Hellman's 50</i>		(All others)
Pasta	47 <i>Mueller 63, Ronzoni 56</i>	Creamette 43	(All others)
Spaghetti sauce	46 <i>Newman's Own 86, Ragu 56, Prego 39</i>		(All others)
Toothpaste	43 <i>Crest 60, Colgate 42</i>	Arm & Hammer 29	
Tuna	41 <i>Bumble Bee 50, Starkist 48</i>		Chicken of the Sea* 19
Jams/jellies	39 <i>Smucker's 39</i>		Welch's* 14
Laundry detergent	36 <i>Tide 55</i>	All 40, Fab 33, Gain 33	Wisk 14
Tea	34 <i>Lipton 44</i>		Tetley 13, Bigelow 0
Dish detergent	34 <i>Dawn 60, Sunlight 38, Ivory 35</i>	Palmolive 30	Dove 13, Cascade 0
Pain relievers	34 <i>Tylenol 47, Advil 38</i>	Bayer 27	Bufferin 0, Motrin 0
Soap	30 <i>Dial 57, Lever 2000 40</i>	Ivory 33, Dove 32, Irish Spring 33	Zest 0, Camay 0
Salad dressing	30 <i>Kraft 49</i>	Hidden Valley 24	Seven Seas 14
Paper towel	25 <i>Bounty 47</i>		Scott* 8, Brawny 0
Frozen juice	23 <i>Minute Maid 36</i>		Tropicana 14
Lotion	22 <i>Lubriderm 38</i>	Jergen's 29	Vaseline* 23
Baked beans	22	B&M 29, Bush 24, Campbell's 26	
Coffee	20 <i>Folgers 29, Maxwell House 24</i>		
Candy bars	18 <i>Snickers 38</i>		Hershey* 11
Household cleaners	13 <i>Fantastik 34</i>	Soft Scrub 29	Lysol* 10, Pine Sol* 10, Formula 409* 10
Canned vegetables	11	Green Giant 38	Dei Monte* 30

<sup>a</sup>The measure used for Table 1 is exact brand preference match (see Figure 1, Expectation 1, where overall average equals 38%). Here, each category average is provided, and some brands' scores are detailed. For example, the top row should be read as follows: "In the soup category overall, 76% of the mother-daughter pairs reported the same brand preference. The Campbell's brand showed an especially high-IG impact, with 84% brand preference matches between mothers and daughters. Progresso also showed promise of IG potential, with 40% preference matches coming from the same families. No other brand showed sufficient evidence of IG influences to be noted here."

<sup>b</sup>Brands in this column show both a high score (relative to their category) on mother-daughter shared brand preference and that this score is statistically above chance levels (z-statistic). Thus, their IG brand equity is real and strong. Bold italics are used for emphasis.

<sup>c</sup>Brands in this column show some evidence of IG brand equity but did not attain both levels for the columns at the left. Either the score was high but sample size was too small for confidence, or the result, though significant, reflects a more moderate IG effect.

<sup>d</sup>This column lists only some illustrative brand names that did not perform well on these tests for IG brand equity. Those designated by an asterisk were tested and found to be nonsignificant. The other brands in this column had samples too small to be tested: Their inclusion is based on either no or very low levels of mother-daughter matches.

## **Assessing the Scope and Extent of IG Influence: A Dyadic Analysis Method**

There is no single perfect measure of IG influences, so it is worthwhile to briefly consider measurement options. Some key IG studies (e.g., Childers and Rao 1992; Heckler, Childers, and Arunachalam 1989; Woodson, Childers, and Winn 1976) have relied on a one-person, single-item measure from the younger family member only. (For a given product, "Indicate whether you bought/buy the same brand your parents bought/own," with the following response alternatives: [1] "same brand as parent[s]," [2] "different brand from parent[s]," [3] "don't know," or [4] "I don't buy/own this product.") This approach provides an efficient report of perceived parent/child ownership but also requires that the young adult be sufficiently knowledgeable to answer on behalf of his or her parents. This may risk inadvertent memory or estimation errors in the response process, similar to long-standing difficulties that have been studied in family decision-making research (e.g., Corfman 1991; Davis 1971; Dellaert, Prodigalidad, and Louviere 1998; Ferber 1955). Moreover, studies using this measurement approach have generally reported clear findings of IG influence. As an alternative, other key IG studies have measured both sides of the parent-child dyad and then compared responses to assess similarity (e.g., Arndt 1971, 1972; Moore and Lutz 1988; Obermiller and Spangenburg 2000). In these studies, IG results have often been mixed—significant for some variables but not for others (for further consideration of this issue, see Viswanathan, Childers, and Moore 2000).

The present study employed several separate measures from the mother and daughter in each family to provide a basis for conservative tests of IG presence and to allow for the exploration of several levels of IG impacts. This creates the basis for a dyad-specific analytical method, based on an exact match or agreement in the answers provided by a mother and her daughter. When no agreement occurs, we infer that any IG effect that may have existed has not persisted into early adulthood for this daughter in this product class. If a mother-daughter match occurs, this family dyad then becomes a candidate for an IG effect, but matches due to chance levels also need to be considered and statistically removed before such a conclusion is drawn.<sup>2</sup> To enhance interpretation, we took measures across several potential levels of IG influence (i.e., product use, daughter's awareness of her mother's favored brands, brands personally considered for purchase, and single most preferred brand) for each of the 24 product categories.

The analysis plan was based on a multistage investigation across the four levels just noted. Within each level, we

<sup>2</sup>This approach could understate some legitimate IG effects if the mother has shifted her preferences recently and the daughter is truly reporting the IG-generated preferences from her family background. Also, given this cross-sectional survey, it is possible that the direction of the IG influence flow could be reversed, reflecting cases in which the daughter has influenced the mother to shift to a newly favored product or brand offering (because this effect would still be of interest, counting these matches at preliminary stages does not appear to be a serious limitation of the method).

calculated separate scores for each of the 24 product categories. The score reflects the extent to which mothers and daughters within the same family provide identical responses. We then made a determination, "Is this actual matching score high enough to conclude that IG effects are present for this product class?" We accomplished this through a two-stage process: (1) calculation of the expected number of participants who would have a matched brand preference if the mothers and daughters in the sample were paired randomly (i.e., no family influence is present) and (2) comparison, through the Z-statistic test, of the actual number of mothers and daughters who match, versus the random expected number if no underlying relationship were operating (Kanji 1993).<sup>3</sup> Thus, we infer that an IG effect is operating only when statistical tests indicate that this is likely to be the case. The final feature of the analysis plan was then to examine IG effects for individual brands in each of the 24 product categories. This has not previously been done in the IG literature, and it enabled us to inquire whether some brands benefit from IG effects whereas others do not or whether all brands benefit equally. We discuss the findings in terms of the four expectations noted previously and portray them in Figure 1 and Table 1.

### **Findings for Expectation 1: IG Impact on Use or Nonuse of a Product Category**

An obvious prerequisite to a shared brand preference is that both mother and daughter use the product. Therefore, we began with the question, "Does usage/nonusage of a product category run in families?" Because many of the 24 products in this study are commonly used by virtually all U.S. consumers (e.g., toothpaste, soap), these were not appropriate for this particular analysis. However, as shown in the first section of Figure 1, in nine of the categories, nonusers accounted for at least 15% of the sample, providing at least 30 nonusers. Therefore, to test for an IG nonuse effect in these nine categories, we examined each nonuser of a product to assess whether her mother or daughter likewise did not use the product. We then tested this result against the

<sup>3</sup>To illustrate the testing method, we assume a simple market in which there are three brands, 100 daughters, and 100 mothers and that everyone prefers one of the three brands. We further assume that the preferences of daughters are arrayed 60, 20, and 20 for Brands 1, 2, and 3, whereas mothers' preferences are 30, 40, and 30. Thus,  $pd_1 = .6$ ,  $pd_2 = .2$ ,  $pd_3 = .2$ ,  $pm_1 = .3$ ,  $pm_2 = .4$ , and  $pm_3 = .3$ . If mothers and daughters were paired randomly, the number of participants expected to be involved in matched preferences is given by the joint probabilities for each brand preference summed across all brands and applied to the entire sample: That is,  $E = [(pd_1 \times pm_1) + (pd_2 \times pm_2) + (pd_3 \times pm_3)] n = [(.6 \times .3) + (.2 \times .4) + (.2 \times .3)] 200 = (.18 + .08 + .06) 200 = (.32)200 = 64$  participants in matching dyads (32 daughters and 32 mothers). Now, we count actual matches in the family pairings and observe that 96 participants (48 daughters and 48 mothers) are participating in preference matches, so  $A = 96$  participants. We now test for significance of this difference using the Z test (Kanji 1993, p. 24).  $Z = (A/n - E/n) / \{[E/n \times (1 - E/n)]/n\}^{1/2}$ ,  $Z = (96/200 - 64/200) / \{[(64/200) \times (1 - 64/200)]/200\}^{1/2}$ ,  $Z = 4.85$ ,  $p \leq .0001$ .

**FIGURE 1**  
**Summary of Results: Expectations 1, 2, and 3**

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**Expectation 1: IG Influences Help Determine Use or Nonuse of a Product**

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**Issue:** Do mothers and daughters agree on nonusage at a rate more than expected by chance?

**Requirements:** At least 30 nonusers in a product category (nine categories qualified).

**Summary Results:** Significant IG impact on nonuse of six categories, IG not significant in three others.

(Percentage of nonusers in same family)	Frozen juice (78%)****	Tea (42%)**	Coffee (n.s.)
	Canned vegetables (49%)****	Jams/jellies (29%)*	Candy (n.s.)
	Baked beans (46%)*	Tuna (22%)***	Peanut butter (n.s.)

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**Expectation 2: IG Impacts Can Be Measured at Different Stages of the Consumer Decision Process**

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**Issue:** Are daughters' reported awareness, choice set, and preference supportive of IG influence at work?

**Requirements:** Responses from mothers and daughters on these measures. All 24 products qualify.

**Summary Results:**

	Daughter Aware?	In Daughter's Choice Set?	Exact Brand Preference Match	Significant?	Percent Gain (Median)	Of Possible
Findings (Means)	69%	60%	36%	Yes****	63%	18%
	17 of 24 correct	14.5 of 24 match		(23 of 24 categories)		

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**Expectation 3: A Variety of Forces Affects Levels of IG Impact**

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**Issue:** Is the mother/daughter brand preference agreement score affected by four particular characteristics?

**Requirements:** Product categories are differentiated on these characteristics, and then IG preference scores are compared.

**Summary Results:**

- A. Categories with a dominant brand produce higher levels of brand preference matches.  
 Mean (dominant) = 65%      Mean (no single dominant) = 32%       $t = 5.27, p \leq .0001$
- B. Categories with a large number of competing brands produce lower levels of brand preference matches.  
 Mean ( $\geq 10$  brands) = 29%      Mean ( $< 10$  brands) = 57%       $t = 1.74, p < .05$
- C. Categories with generation usage differences produce lower levels of brand preference matches.  
 Mean (difference) = 32%      Mean (same) = 37%       $t < 1, n.s.$
- D. Categories with a significant number of nonusers produce lower levels of brand preference matches.  
 Mean (some nonusers) = 29%      Mean (high usage) = 40%       $t = 1.74, p < .05$

\* $p < .10$ .  
 \*\* $p < .05$ .  
 \*\*\* $p < .01$ .  
 \*\*\*\* $p < .001$ .

level of chance alone (were the mothers and daughters unrelated).

As shown in Figure 1, evidence of IG influence appeared for six of the nine product categories. Results ranged widely. The strongest results occurred for frozen juice. Though not shown in this summary figure, 62% of the sample did not use this product form, but as shown, nonuse does run in families. Of the dyads in which a nonuser appeared, 78% had both mother and daughter as nonusers (i.e., stated another way, in only 22% of the cases of frozen juice nonusage did mothers and daughters behave differently from each other). This level of family correspondence is far above that expected by chance, indicating a statistically significant IG impact on nonuse. A similarly strong result emerged for canned vegetables, which showed 49% family agreement on

nonuse. Family background was also significant for daughters who do not use baked beans, tea, jams/jellies, and tuna.<sup>4</sup>

As indicated at the right-hand side of Figure 1, tests for coffee, candy bars, and peanut butter showed no significant differences from chance: Daughters who do not consume these products have apparently made this choice for reasons other than IG learning (e.g., health, fitness). Overall, Expectation 1 was supported: IG influences help determine the purchase or nonpurchase of some, but not all, products.

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<sup>4</sup>Although they are not shown in the figure, we conducted parallel analyses for family agreement on users of these products: In every case, the agreement scores are higher than those shown, except for frozen juice, which still registered a robust 64% agreement.

Managerially, moreover, the finding that this effect is product-specific indicates that customized category research is needed for marketing decision making.

### ***Findings for Expectation 2: IG Influences and the Hierarchy of Effects***

One logical model of IG effects suggests that we can expect to find that a daughter's awareness of her mother's preferences is a logical precursor to further consideration of them for personal purchasing, a shared brand preference over time being the key indicator of IG influence in the marketplace. The middle section of Figure 1 presents overall results, averaged across all 24 products. Notice that these cascade from higher to lower levels, as is expected with hierarchical models.

With respect to awareness, mothers were asked to recall up to three brands that they consider when making purchases in each product category. Many provided only a single brand, others listed two, and some listed three brands. Meanwhile, daughters who purchase the product themselves were asked to recall a brand their mothers prefer in each of the 24 categories. The awareness score here shows that the brand named by a daughter appeared somewhere in her mother's consideration set 69% of the time, averaged across all 24 product categories. Although not perfect, this corresponds to approximately 17 correct predictions per daughter, indicating substantial awareness of mothers' preferences. Extreme results were registered for soup, tea, and peanut butter (all above 83%). Inspection of other results suggested that daughters are generally less likely to be aware of household maintenance products, such as dish detergent, paper towels, and household cleaners (all approximately 50%). It is not clear why this is the case: Some daughters may not have used these products while at home, some mothers may have shifted preferences recently, and/or daughters may simply have lower involvement levels with these products. Overall, however, in every product class, a substantial segment of daughters was aware of their mothers' brand preference.

Our next measure shifts focus to the brands the daughter currently considers for purchase. For choice set analysis, we asked whether the brand the mother most prefers is also among those her daughter considers when purchasing. As shown in Figure 1, across all products, this occurred approximately 60% of the time, or for 14.5 of the 24 product categories on average. The extreme categories and pattern of scores were similar to the awareness findings but had a lower level of agreement in almost all (21) product categories. Comparing these results in Figure 1 indicates that, on average, 9% of the daughters (i.e., 69% – 60%), though knowing their mother's preference in a given category, have chosen not to consider that brand for their own use. The extent of decline varied considerably, and some personal care products (lotion, soap) and foods (tea, coffee, pasta) were especially susceptible (with drops of approximately 20%).

Given these precursors, the key measure for our assessment of IG impacts on brand equity is, "In how many families do the mother and daughter report an identical brand preference?" We should note that exact brand preference match is a conservative measure, in that it includes all dyads

in which one member uses the product and it requires an exact match on the most preferred brand (i.e., here, a non-matching dyad would have either different brand preferences or one person not using the product, in either case indicating a lack of IG impact). As noted in Figure 1, IG agreement over all families and products averaged 36%—far above chance—and was statistically significant in 23 of the 24 product categories. Only for canned vegetables does the IG brand preference effect not reach statistical significance, but recall that here we had already observed an IG effect on product usage. Thus, we have discovered some form of significant IG impact on all 24 products in this study.

Given that IG effects have been uncovered, just how strong are they? The rightmost columns in Figure 1 present evidence on this question, in terms of gains obtained when actual scores are compared with the baseline chance expected level if no IG influences were operating. Readers will recognize that it is difficult to choose a single statistic that best reflects all situations: We therefore include two indicators in Figure 1. The "Percent Gain" column reports the gain (actual match score minus expected score) as a percentage of the expected baseline level if mothers and daughters had been randomly paired. This statistic indicates a clear impact of IG influences, with a median improvement of 63% over chance levels. Specifically, soap, baked beans, frozen juice, coffee, lotion, dish detergent, household cleaners, and laundry detergent all registered actual IG scores that more than doubled chance matching levels. However, because these percent gains are due in part to low expected levels in some categories, we also include a second measure to provide a fuller picture of IG impacts. The "Of Possible" column reports the statistic recommended as best by Green and Tull (1966, p. 305). Here, the absolute improvement (actual score minus chance score) is divided by the amount of variation left to be explained beyond the baseline expected level: This accounts for the difficulty in improving scores when baseline levels are already high. For example, soup's actual score (which appears in the left-hand column of Table 1 as 76%) was very high because of Campbell's brand dominance in this category. However, this also raised the expected score by chance, so that the soup category did not register an impressive IG gain as a percentage over baseline chance (it was 10%, significant but not large). With the second measure of gain, however, the soup category IG gain score rises to a respectable 23%, which is above the average for all products. According to this measure, the strongest IG effects on brand preference are found for peanut butter, mayonnaise, pasta, and spaghetti sauce, and across all categories, the mean improvement attributed to IG influences is 18% of the variation available.

Overall, Expectation 2 was supported. An adapted hierarchy of effects was useful in examining different levels of IG influences, indicating that an underlying system is operating, in accord with expectations. Furthermore, results on the key measure of IG influence showed significant effects on actual brand preferences for 23 of 24 product categories.

### ***Findings for Expectation 3: Multiple Marketplace Forces Can Affect Levels of IG Scores***

As noted previously, the analysis of IG effects can become complex. For example, we needed to compare the mother-daughter match scores in this study with highly varying

chance expectation levels to infer whether IG was operating. This reflects the fact that IG influences are but one of many forces operating in the marketplace and are likely to be affected by other factors (e.g., competitive efforts, innovations, peers). Thus, a variety of forces may be at work to either raise or lower levels of IG influences for a particular product. Therefore, as a planned feature of the analysis, we examined four marketplace characteristics anticipated to influence the mother–daughter agreement scores in our data. Each characteristic applied to some of the 24 categories but not to others.

The level of brand preference agreement between mothers and their daughters should be related to the distribution of consumer brand preferences in the market, and when these are heavily concentrated on a single brand, both actual and expected match scores should increase. In three of our categories, a single dominant brand emerged, defined as at least three of five consumers naming it as most preferred. As shown in the third section of Figure 1 (see Test A), categories having a single dominant brand (Campbell's Soup, Heinz Ketchup, and Kleenex Tissue) produced much higher mother–daughter agreement than did categories with more equal competition (65% versus 32%,  $p \leq .0001$ ).

Test B shifts attention to another feature of the competitive environment, the number of brands in a product category (operationalized here by the number of unique brands mentioned by respondents). In addition to its substantive marketing implications, this characteristic has statistical impacts in a study such as this: That is, the higher the number of brands, the lower is the level of mother–daughter brand preference matches to be expected by chance alone, and likely the lower are the scores for IG impacts as well. Our two analyses here support this supposition. As shown in Figure 1, mother–daughter matching scores for product categories with a higher number of competing brands—at least 10—were significantly lower than those for categories with fewer brands (29% versus 57%,  $p \leq .0001$ ). Visually, moreover, we observe how striking this effect can be by examining category rankings (in the left-hand column of Table 1). The top third of categories (soup to toothpaste) averaged 12 different brands, the middle third (tuna to salad dressing) averaged 18 brands, and the bottom third (paper towels to canned vegetables) revealed an average of 26 brands per category. Therefore, market fragmentation is also a characteristic to be considered in interpreting IG scores.

Though related by family ties, mothers and daughters also belong to unique age cohorts, which are subject to some different lifestyle influences. Therefore, our third test (Test C) examined the question, “What is the impact, if any, of generational usage differences whereby mothers in general may be more likely to drink tea or coffee, or daughters more likely to use prepared spaghetti sauces?” In seven categories, the usage rate for the group of mothers differed statistically from the usage rate for the group of daughters, which led to the hypothesis that dyad matching scores would be suppressed here (because of the greater prevalence of nonusers in one age group, which would thus preclude a brand preference match for those families). However, although our overall results produced mean scores in the predicted direction, these did not reach significance (32%

versus 37%, not significant). However, we should note that generational differences could still affect results in a specific category.

Finally, Test D in Figure 1 directly tested the nonusage hypothesis. Here, we examined the nine product categories in which significant levels of consumer nonuse occurred (Expectation 1) and then tested whether IG brand preference agreement might be suppressed, again because nonuse by one family member would rule out a preference match for that family dyad. Statistical tests indicated that this was indeed the case: Product categories with more nonusers had lower agreement scores than categories in which virtually everyone is a consumer (29% versus 40%,  $p \leq .05$ ).

Overall, Expectation 3 was supported. The level of mother–daughter agreement—our primary indicator of IG influence—is affected by several marketplace characteristics. It is important to take these forces into account not only in statistical tests for IG impacts, which we did through the calculation and use of chance expectation scores, but also in managerial interpretations of research findings.

#### ***Findings for Expectation 4: Some Brands Are Differentially Strong on IG Impacts***

Given our observation of IG results at the product class level, our interest now turns to specific brands. As we show, IG impacts are particularly interesting at this level of analysis. Here, we ask, “Do all brands benefit equally from IG brand equity, or are there meaningful differences among competitors?” and “Does this picture vary across product categories?” Table 1 presents findings on these issues.

***Brands with high-IG brand equity.*** Relative to our research questions, a visual analysis of Table 1 shows that all brands do not benefit equally from IG impacts, and real differences exist across product categories. Using the category average as a basis for comparison, we find several brands with high-IG brand equity. The highest scores were registered by Newman's Own Spaghetti Sauce (with 86% of its support coming from mothers and daughters from the same families), Campbell's Soup (84%), Heinz Ketchup (80%), Peter Pan peanut butter and Kleenex tissues (both at 67%), Mueller pasta (63%), and Dawn detergent and Crest toothpaste (both at 60%). As shown, several other brands also draw substantial support from IG households. In all these cases, the results were statistically significant when compared with the level of agreement expected if no household influences were operating. (We should note that all brands listed are major market share entries; because our analytic method requires threshold sample sizes, we could not test some regional, ethnic, or specialty brands with small shares in this study, though it is likely that some also benefit from high-IG equity. Marketers conducting research in a given category should be able to examine this as appropriate.)

***The IG brand silo effect.*** In examining the pattern of high-IG results, we note that in only 2 of the 24 categories did no brand emerge as strongly benefiting from an IG influence. However, we also find that most IG matches occur for only a few brands in a category and that brand differences on IG scores are the rule, not the exception. In about half the



categories, only a single brand (e.g., Campbell's, Heinz, Tide, Snickers, Fantastik) strongly benefits from IG support compared with the category overall. Beyond this, 11 categories show multiple brands with high-IG scores; we consider these markets as having "IG brand silos," in which large numbers of loyal households continue to prefer a particular brand across generations, but in isolation from one another. Seven of these categories revealed that 2 major brands draw significant levels of IG support. For example, we find Crest households and Colgate households for toothpaste, Kleenex households and Puffs households for tissues, Tylenol households and Advil households for pain relievers, Bumble Bee households and Starkist households for tuna, and, at the bottom of the column, Folger's households and Maxwell House households for coffee. In 4 other categories, 3 brands draw significant portions of their support from IG households. In peanut butter, for example, there are Peter Pan, Jif, and Skippy brand silos; these effects are so strong that no other brand received even a single match from any household. Meanwhile, strong brand silos also appear for Newman's Own, Ragu, and Prego spaghetti sauces; for Dawn, Sunlight, and Ivory dish detergents; and for Miracle Whip, Kraft mayonnaise, and Hellman's mayonnaise (here, we note Kraft's successful segmenting of the market in establishing the first two brands as distinct IG powers). As a final observation, in no category did the number of silo brands exceed three, even though most categories had more than 12 brands competing (up to 48 brands were listed by participants for the lotion category). These brand results are obviously illustrative, arising only from our present sample, and should not be generalized beyond it because of limitations as to size, convenience, and regional setting. However, our interest here is in exploring IG impacts at the brand level. In this regard, these findings are important and merit future study.

*Brands with IG potential.* The third column of Table 1 lists additional brands that showed reasonable evidence of benefiting from IG brand equity but for various reasons did not qualify for inclusion in the high-IG listing. The most typical issue here was sample size—the scores are reasonably high (and in most cases statistically significant), but the number of consumers noting these brands is just not enough to receive confident mention. In a managerial context, these would be candidates for diagnostic evaluation. Relative to our interest in IG influences and brand equity, however, these brands offer additional evidence of the presence of IG in the marketplace.

*Brands with low or no evidence of IG impacts.* The emergence of so many well-known and successful brands in the high-IG list might lead us to suspect that IG is a general source of brand equity across the marketplace. However, this is decidedly not what emerged from this study. The right-hand column of Table 1 identifies two types of low-IG performance. First, designated by an asterisk, are well-known brands with sufficient sample size to be tested and whose IG results proved not to differ from chance. That is, members of both generations buy these brands, but there is no family factor involved—purchasers come from different households. Among these brands are Hunt's catsup; Chicken

of the Sea tuna; Welch's jelly; and Lysol, Pine Sol, and Formula 409 cleaners. For these brands, we are reasonably confident that IG is not operating, at least within the current study.

Second, for many other cases, sample size is a constraint, and it is difficult to draw confident conclusions about the presence or absence of IG impacts. However, one common result was a failure on the part of many brands to register any household matches at all. We have listed some of these in the right-hand column as well, but given sample size, this listing must properly be viewed as only illustrative. Nonetheless, we note some of the major brand names that drew zero IG support in our sample, including Del Monte catsup, Bufferin and Motrin pain relievers, Cascade dishwashing detergent, Zest soap, and Brawny paper towels. These findings of low or no brand impacts add a useful insight to our understanding of IG effects in the marketplace—they are selective.

Overall, the results of Study 1 highlight the many levels at which IG effects are manifested, the measurement challenges that emerge, and the importance of considerations involving the characteristics of particular segments, categories, and brands. At a pragmatic level, IG brand equity is a valuable asset. Further understanding of its sources, nature, and operation is warranted. We delve more deeply into this topic in Study 2.

## Study 2: Exploring the Nature of IG Influences

Study 1's findings show that IG relationships are at work at various levels in the marketplace and offer contributions to brand equity in a selective manner. However, the survey method is limited in providing an explanation of how IG influences work. Therefore, we paired the survey method with an interpretive research method that provided a forum for daughters to express their views on the role of IG influences in their daily lives.

### *Research Design and Sample*

Twenty-five young adult women participated in a phased set of depth interviews. These interviews were conducted over the course of several days, first at home, then in the store, and then at home as part of a pantry audit. Notably, this interview structure enabled us to directly examine brand purchases as well as preferences. Informants were students at a major Midwestern state university, lived in off-campus housing, and shopped for groceries on a regular basis. Some informants had been independent shoppers for as little as two months and others for as long as two and a half years, thus providing some range of experience. Informants were purposively selected (Lincoln and Guba 1985), and each was interviewed for 3–4 hours. Our approach was discovery oriented in nature and based on a topical life history approach (Denzin 1989). The first interview gathered information about shopping histories, personal shopping styles, brand preferences, and family histories. Then, on a different day (typically within one week), a research team member accompanied the informant on a grocery shopping trip, dur-

ing which informants were encouraged to “think out loud.” Here, we observed purchases as they were made, followed up with discussions of the informant’s choice considerations (including IG impacts), and gained information on in-store factors in purchase decisions. Immediately following the shopping trip, the third interview involved the researcher and informant returning home, putting groceries away, and continuing the discussion. Also, kitchen cabinets were opened and informants were encouraged to “tell the story” behind the brands there, as well as those just purchased. Life-history information, especially related to mother–daughter relationships, was gathered during this closing session.

### **Analysis**

We audio recorded and then transcribed all interviews. The verbatim transcripts served as the primary data from which conceptual categories and relationships were identified. An extensive and structured process was used to identify and preserve essential insights following the discovery-oriented aims and procedures of grounded theory (Glaser and Strauss 1967; Strauss and Corbin 1998). The first two authors read and independently coded each interview. Emergent categories were compared and discussed in detail for the first six interviews. These initial categories served as a structural basis for coding the remaining interviews, and we incorporated enrichments as necessitated by the data. We independently coded all remaining interviews and then compared them on a line-by-line basis. Discrepancies were few, and we resolved them through discussion. We then sorted, compiled, and assessed data relevant to each emerging category for conceptual fit.

### **Results**

The interviews provided a rich set of findings into the nature of IG influences, how they came to develop in our informants’ lives, and how they operate today. Some have been noted in the IG literature, and others have not previously been identified. We have organized these into an extensive framework, as shown in Figure 2, composed of three major sectors. The “Marketplace Manifestations” sector reports the variety of ways IG influences are at work in consumers’ lives, the “Factors in Formation” sector provides observations into how IG influences develop, and the “Endurance in Adulthood” sector delves into forces that affect IG influences after the child leaves the family home.

#### ***Insights on Marketplace Manifestations of IG Influences***

Three aspects of IG stressed in the survey analysis were also evident here. Matches in mother–daughter brand preferences, interest in multiple brands (choice sets), and IG influence on product usage were all commonly reported. Beyond this, however, the interviews provided many additional insights.

*Aspects of repetitive purchase.* One key aspect of IG influences is that it leads to a daughter’s repeated purchases of a favored brand. In probing the motivations underlying these purchases, a mixed picture emerged. At one level, IG

purchases had been internalized as simply brand favorites. The purchase was explained as based on knowing that the brand offered good functional performance. In addition, strong elements of familiarity and inertia were often present in descriptions of IG repetitive purchasing:

It’s because that’s what we’ve always had at home. It’s a “something I grew up on” type of thing. And for some reason the only type of ketchup—I only like Heinz ketchup. I think it’s just another thing, ever since I was a little kid—that’s what we’ve always had. (13a6)<sup>5</sup>

Just habit probably—I don’t know. It was what I knew, so I’d get it. (12a7)

The things that I like, that we ate at home. I like those, so I’m going to buy them also. If I ate them at home, why am I going to stop eating them? So I just buy them at the store myself now. (2a11)

In contrast to a focus on the brand and its features, these reports reflect IG repetitive brand purchases as a decision rule that offers efficiency. Notice, however, that the brevity of these explanations provides little insight into any other elements of the decision calculus that might be operating. For example, one supporting dimension of IG inertia could be low consumer involvement—with little time, effort, or thought given to the decision:

I got Ragu to go with the pasta.... I’m used to that. You know, I don’t really think of this.... I don’t really think about what I’m going to buy or why I’m buying it.... I just get what I need. (21a6)

Repetitive brand purchase might at times represent a simplifying consumer decision strategy of daughters relying on their mothers’ expertise and experience. Here, favored brands are well justified in the daughter’s mind because the mother has tested the alternatives and pronounced her winners:

I buy Dawn just because—my mom always used Dawn ... cleaning products, detergents, Downy softener, and the Downy ball—even when I’m here on my own I use those products.... So when I do my own shopping, I pick those products too. (15a12)

In summary, some evidence supports Heckler, Childers, and Arunachalam’s (1989) expectation that one benefit of IG influences is that they offer daughters a simple decision heuristic to use in dealing with a complex consumer marketplace. As noted, however, various forces are reflected in this repetitive behavior.

*IG and emotional bonds with brands.* In contrast to cases of a simple heuristic, IG influences sometimes create special emotional bonds between the daughter and a particular brand. As indicated in Figure 2, trust was evidenced in many brand selections and descriptions: The brand was appreciated for its long tradition of faithful service to the needs of first the family in years gone by and now the daughter today.

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<sup>5</sup>Informants are identified by a number (1–25), the interview (a = first interview conducted in home, b = second interview conducted in the store and completed in the informant’s home), and page number in the interview transcript.

**FIGURE 2**  
**A Framework for Understanding IG Influences in the Marketplace**

<b>I. Marketplace Manifestations</b>	<b>II. Factors in Formation</b>
<p><b>IG Dimensions in Survey</b></p> <ul style="list-style-type: none"> <li>-- Brand preference</li> <li>-- Consideration set</li> <li>-- Product use/nonuse</li> </ul> <p><b>IG as Repetitive Purchase</b></p> <ul style="list-style-type: none"> <li>-- Functional performance</li> <li>-- Familiarity</li> <li>-- Inertia</li> <li>-- Reliance on mother's expertise</li> <li>-- Low involvement</li> </ul> <p><b>IG as Emotional Bond</b></p> <ul style="list-style-type: none"> <li>-- Trust</li> <li>-- Nostalgia</li> <li>-- Overcoming loneliness and trepidation</li> <li>-- Brand as play</li> <li>-- Resentments and brand avoidance</li> <li>-- Brand as a symbol of allegiance</li> </ul> <p><b>Other IG Insights About Products and Brands</b></p> <ul style="list-style-type: none"> <li>-- IG as a brand portfolio</li> <li>-- IG as competitive barrier/opportunity</li> <li>-- IG as desired brand tier</li> <li>-- IG as new product propensity</li> <li>-- IG for preference for product forms</li> <li>-- IG as a limiting brand force</li> <li>-- IG as a reverse influence flow</li> </ul> <p><b>Other IG Dimensions: Beyond the Brand</b></p> <ul style="list-style-type: none"> <li>-- Shopping style and preference</li> <li>-- Good consumership</li> <li>-- Following the rules: norms for behavior</li> <li>-- Packaging entire assortment</li> <li>-- Adoption of lifestyle dimensions</li> <li>-- Ties to personal identity (remembered rituals, ethnic heritage)</li> </ul>	<p><b>IG Influencers Within the Household</b></p> <ul style="list-style-type: none"> <li>-- Impacts of a family's structure and lifestyle</li> <li>-- It's a mother's domain</li> <li>-- The influencers beyond mom</li> <li>-- Altogether, a rich information environment</li> <li>-- Parental roles: guidance and adaptation</li> <li>-- Heterogeneity across households is the rule</li> </ul> <p><b>The Substantive Formation of IG Influences</b></p> <ul style="list-style-type: none"> <li>-- Governed by children's learning processes</li> <li>-- Shopping participation plays a huge role</li> <li>-- Observational learning also contributes</li> <li>-- Shopping lists, rules, and limits as control devices</li> <li>-- Allowing for personal tastes</li> <li>-- Children's influence attempts as participant learning</li> <li>-- Coherence helps: resolving inconsistent messages</li> <li>-- Parents are evaluated too</li> </ul> <p><b>IG Development Across Time</b></p> <ul style="list-style-type: none"> <li>-- A continuous process across the years</li> <li>-- Some IG effects are age-specific</li> <li>-- Preference stability a plus for IG growth</li> <li>-- Impacts of structural and lifestyle changes on IG</li> <li>-- As the life cycle moves along, shifts in IG and acceleration of reverse IG</li> </ul>
<p><b>III. Endurance in Adulthood</b></p>	

**A. SOURCES WITH DISRUPTIVE POTENTIAL**

**New Influencers: Spouse, Roommate, and Peers**

- Joint purchase decisions
- Introduction of new options and categories
- Influences on choice criteria
- New roles: purchasing agent for others
- Gifts
- Social disdain: peers and media
- Conformity pressures

**New Lives Bring Shifting Lifestyle Demands**

- Income constraints
- Mobility
- Time at a premium
- Plenty of personal meal occasions
- Period of experimentation

**Altered Marketplace Experiences**

- Lack of brand availability results in frustration
- Sales promotions, sampling, premiums
- New products, information, and metrics
- Mismatched package sizes
- Product line deletion

**Other Insights on IG Disruption**

- Incomplete IG knowledge
- Parents change as life cycle continues
- Behavior is not the only measure of IG
- Time and distance

**B. SUSTAINING FORCES FOR IG INFLUENCES**

**Forces that Support Repetitive Purchase**

- Performance, familiarity, inertia, low involvement (see "Marketplace Manifestations" above)
- Risk aversion
- Regularity as a reinforcer
- Seasonal rituals as IG support

**Maintenance of Self-Identity**

- Ethnic identity as IG sustainers
- Select lifestyles shape choice options
- IG brand as safe harbor
- IG as basis for influence attempts on others
- Loosened constraints allow IG enactment
- Reverse IG: bringing parents back

**Parents as IG Sustainers**

- IG purchases as continued loyalty to parent
- Proximity is a key issue
- Family shopping outings as reinforcers
- Parents as product suppliers
- Inputs from afar: coupons from home
- IG influence attempts continue to occur in adulthood

**Marketer Actions to Help Sustain IG**

- (see "Managerial Implications" section)

This feeling often extended to overt nostalgia, as warm memories of home and family became interwoven with the brand's special image and properties. For example, some IG brands were identified as sources of pleasure through play. Conversely, other brands were appreciated as helpful in overcoming feelings of loneliness and trepidation that were experienced by the daughter in her new life.

I have salad dressing, from Seven Seas—that's what my Grandma buys, and I always spend the summers with her in Michigan, so I like that kind of dressing. (24a5)

I like Jell-O and pudding but ... I didn't do that much this year. My mom even said something about it. When we came here she said, "Oh Beth, you didn't make Jell-O this summer."

I don't buy generic stuff, I buy Jell-O brand, 'cause it is fun and I was brought up on it. (8a3)

It's like what I was saying about the Bisquik. This is going to sound stupid, but it's kind of comforting to have it sitting in my cupboard. It makes the kitchen homey. (23b6)

Finally, IG brand emotional ties also emerged that were symbolic of significant personal relationships (Olsen 1993). Some of these were overtly negative: Marketers should be aware that some IG brand influences can lead to brand avoidance if a brand has come to symbolize long-standing resentments or other negative emotions related to earlier family life. When positive, however, a brand can attain a particularly strong IG preference as a symbol of allegiance to loved members of the family.

I like Brownberry bread ... because it has sentimental value for me. Which sounds really dumb but it is true. Before my dad remarried, we would always eat healthy food, well relatively healthy. And I would eat my vegetables and we would have Brownberry wheat bread. (1a5)

*Other IG insights about products and brands.* The interviews also illuminated other forms of IG brand influences and choice heuristics. For example, impacts are not limited to a single brand: Daughters may purchase IG favorites as a portfolio of brands. Furthermore, as the survey results show, various dimensions of IG influences act as competitive barriers/opportunities. For a few brands, such as Campbell's Soup, the IG barrier might extend to daughters' failure to have ever sampled any competitive entry, and in other cases, the belief in a brand's superiority appears to be so strong that trial purchases of competitors are extremely unlikely.

We eat a lot of the same cereal, like she always tended to buy—sometimes she'll go off skew and buy something weird like honey crunch something.... But usually it's Cheerios and Special K and Crispix and Rice Krispies, and those are the three or four that we always had, and ... I like those too. (7a11)

I always only buy Campbell's Soup. I've never had anything else. (16a7)

Oh, Tide [detergent]. That's the only kind that really works. (3a8)

Beyond the number of brands considered in a category, the interviews also contained many examples of IG influ-

ences on the desired "brand tier." This phenomenon extends across products and includes IG preferences for status brands, as well as strong positive and negative views about private labels and generics. Note that the presence of strong IG influences in all these cases eliminates a large number, even entire tiers, of competitive offerings from receiving any consideration for purchase.

For some reason, I want it to be name brand stuff; that's how my mom always was. And so if I was going to buy crackers or something it would actually be Ritz instead of the store brand. (9a3)

She will only buy Campbell's Soup or Kraft Macaroni & Cheese. Yeah, my mom would never be cheap and buy a generic brand because, well, she's kind of a snob. Yes, I can admit it, I'm a snob. I get it from my mother—because I wouldn't want her to buy a gross generic brand. If she brought that into my house, I think she'd seriously offend a lot of people.... It would be very uncharacteristic of my mom to get something that wasn't a brand name. She just doesn't do that. Image is everything. (21a3)

Intergenerational influences were also evident at a somewhat broader level, but still with implications for brand management. First, a propensity toward new products appeared in some cases: This will tend to work against IG brand loyalty. Second, many instances of IG preferences for a particular product form arose, in which emphasis was on desired attributes rather than the brand itself. Notably, this IG phenomenon would not have been isolated in our survey results. Also emerging more sharply was the operation of IG influence as a limiting force against brands. Included here were daughters who had learned beliefs of no meaningful differences among competing brands in a category or daughters who had learned mistaken perceptions (e.g., the terms for private labels and generics were at times confused). Also, consistent with Study 1, IG influences to avoid the use of certain products were observed:

I like a particular type of noodle. I only buy rotini noodles. But ... I don't care what brand. (1a8)

When you have a peanut butter and jelly sandwich you can't have any other jelly but grape jelly, I don't know why—it has to be grape.... [Interviewer questions about a brand preference.] No, it doesn't matter what kind. Just grape.... It's very important that you have grape jelly. (9b5)

I don't have any one specific [brand of ice cream]. I just remember that I bought one thing of ice cream—and my mom always switches on that too actually, just because.... Well, no, I don't have one particular brand that I go with. I like certain flavors, so I'll just try different brands. (14a12)

Not a big soup fan because ... I never really ate it 'cause I always felt it was a pain. Put it in a pan, heat it up, put it in a bowl, eat it. And it wasn't ever in my house. (10b10)

Finally, as has been discussed in both the sociology and consumer literature, a reverse flow of IG influence was also evident (e.g., Glass, Bengston, and Dunham 1986; Moschis 1988):

I actually introduced my Mom to Downy balls. Because she always used to use Downy, but she hated—she didn't have time to wait for the rinse cycle—and I said mom, there's these great Downy balls that just pop open during

the rinse cycle. And so now she uses Downy ... and our clothes smell a lot better. (7a12)

*Additional consumer dimensions of IG.* The interviews were also helpful in identifying related forms of IG influences beyond products and brands. Because they can direct a consumer's entire approach to the marketplace, these higher-order influences can also offer lessons that are useful for marketing strategy. Virtually every daughter reported elements of IG shopping style and preference, including having learned to enjoy (or not) shopping, how "price conscious" to be, and so forth. In keeping with Hill's (1970) analyses of three generations, some daughters had learned "good consumership" from their mothers. Also, many IG influences seemed to take the form of rules, or norms for behavior, which themselves differ across households. As the final quotation shows, violations of these family rules sometimes provide colorful memories:

She's done that before and it's just really comical. "God, I didn't really need to get all of this." And, you're like "How could you accidentally buy almost \$200 worth of groceries, Mom?" She loves shopping. I love it too. I wish I had the money to go grocery shopping every day. (3a16)

Okay, look at the bottom of this apple, the butts are nice and tight and closed—that means it's good. (22b2)

I'm a big nutrition back label reader; like, I always try to look for what has the least amount of calories, the highest amount of vitamins.... I think my Mom is pretty adamant about doing that, because she wants to make the healthiest choice—money doesn't, it's really not an issue in the purchase decision. (24a6)

My Mom was having gall bladder surgery when I was little, and she was in the hospital for about three or four days, so it was just our Dad taking care of us. He had to go grocery shopping, so he piled all three of us kids in the car and off we headed to the Jewel.... Big mistake.... I remember coming home and unloading our groceries, and we had all this junk food. We were in heaven! We had Hungry Man frozen dinners and eight types of cookies and peanut butter—guy food, you know? And dip, you can't forget the dip—it's like my Dad was getting ready for a huge football marathon weekend or something.... I always look back on that and remember it fondly because when my Mom came home she was like, "Steven, what happened here?" ... I think he was just experiencing a moment of temporary insanity. That's what made him buy all those Hungry Man's on an impulse. (22a4)

Daughters also reported IG influences on packages of entire assortments. Reflecting our emphasis on food products, we learned of appropriate ingredients to create a particular dish or entire meals. More broadly, there was clear evidence of IG influences on adoption of a healthy lifestyle for some informants:

I tend to buy a lot of the same types of cooking products as my mom, like this extra virgin olive oil—my mom gets this kind ... or, like in the fridge—I have tofu, and she buys this same package. (24a5)

I'll pack my lunch for school here, and I'll put the same things in it. So I put cut carrots and a sandwich and pretzels and like an apple, maybe.... I remember when we were little we always used to whine.... We got bored of our meals; it was carrots, apple, and a sandwich and pretzels. (7a10)

Well she always has a list and very rarely sways from the list.... We were never big junk food people.... We never had sugar cereals, never drank soda.... Most of the stuff that we asked for was pretzels and apple juice, and I don't know—just stuff that we really like. (17a2)

Finally, a key aspect of IG influences is their potentially central role within a daughter's view of herself, reflected in IG ties to personal identity. The following quotations capture three facets: remembered family rituals; ethnic heritage; and, in a final poignant report, a long-term eating disorder with clear IG roots.

My Mom is the type who always takes a day off work each year right before Christmas to make Christmas cookies. When we were really little, we loved this day because our house would smell so good. She'd put all the warm cookies in the dining room to let them cool off, and then we'd all sit there with big glasses of milk and sample everything.... I remember my mom taking me grocery shopping the night before one of these Christmas cookie bake-off days, and she was telling me, "Emily, it's always important to use the best ingredient"—like butter versus margarine and Nestlé Toll House chocolate chips, not generic ones. (22a11)

I just can't eat french fries and hot dogs, just don't like the taste or something.... I like to make, well ... Puerto Ricans make a lot of rice, so I eat a lot of rice, a lot of beans, like we eat a lot of beans, and tomatoes and carrots and potatoes ... [and] check out that lard—that's what a lot of Puerto Ricans use to cook. (19b3,6)

I have an eating disorder. It was much worse during high school, and I've had a chance to talk to counselors about it. I always have been really concerned with my weight, and I do not have a speedy metabolism. But I am very disciplined, so I work out. I don't want to sound like I'm blaming my mom, because I'm not. After all, I'm the one who makes the decision as to what I'm putting in my body. It's just very difficult to grow up in a house where you get really small portions of this weird health food. My mom is very petite, she was Miss [major state name], if that gives you any indication as to what type of frame she has. I take after my Dad, and I know that I'm not fat. I'm just not built like her, and that is difficult. (24a3)

### *Factors in the Formation of IG Influences*

In the second section of the framework, attention turns to how IG influences develop. However, because our focus is on managerial implications of IG for brand equity, we simply highlight major findings on formative aspects of this socialization process (for a more detailed analysis, see Moore, Wilkie, and Alder 2001). As shown in Figure 2, three sets of formative factors merit attention. First, household influencers include structural and lifestyle considerations, people, and roles. It became clear that the specific family form and lifestyle determined dominant interaction patterns and, ultimately, the IG preferences that were learned: This was particularly striking in some blended families and families in transition. Across households, the mother emerged as chief influencing agent, through both her nurturing and supervisory activities. Depending on the household, fathers, grandparents, and/or siblings also exerted significant influences. When multiple influencers were at work, a richer, sometimes

confused information environment emerged, in which adaptations and compromises were necessary. Parental roles included both guidance and management of adaptive processes. Although families were generally consistent on these dimensions, we also observed aspects of IG formative processes that reflected each family's unique character.

Our second set of observations involves the substantive content of IG influences. This is a natural subset of what is learned as a child matures and is governed by children's broader learning processes (e.g., John 1999; Moschis 1987; Ward, Wackman, and Wartella 1977). For example, participation in the household's shopping is central to IG formation, as is observation of products and brands in the home (packaging also emerged as having a memorable impact in this regard), as well as direct communication about preferences and practices. Some mothers also used public family lists, rules, and purchase limitations as control devices. The interviews also underscored the importance of efforts to satisfy a child's personal tastes. For example, IG product and brand preferences seemed to emerge more strongly when children believed that their personal desires were being represented in household purchase decisions. Reports of several in-store purchase influence attempts, both successful and not, captured this phenomenon. In this regard, daughters also spoke more broadly of themselves and other family members having to reconcile conflicting preferences: Households with more stability and coherence appeared to yield stronger IG brand preferences. Children also reported several occasions of evaluating—both positively and negatively—one or both parents on a variety of consumership dimensions, including shopping styles, dietary preferences, spending limits, and planning or lack thereof (when direct comparisons were made, it was the father who commonly came out on the short end of these judgments). Overall, the substantive dimensions of IG influence formation involved more evaluation, negotiation, and adaptation than might be apparent at first glance.

Our third set of findings involves IG influences' development across time. Here, we expressly recognize the larger dynamics of this process, which operates in a relatively continuous fashion for approximately 18 years, or until the child leaves the family home. Observations in this area include the recognition that certain experiences are age-defined (e.g., children's cereals, early teen cosmetics), and these temporally bound IG influences will not persist into adulthood (however, some may reappear when these daughters are raising their own children in the future). Furthermore, some IG influences will exist and then be replaced if the marketplace shifts or the household revises its behavior to feature another brand favorite. A special case involves the impact of changes in a family's structure or lifestyle: In these cases, several shifts in IG preferences may ensue as certain family members leave, join, or change their behavior within the unit. As a final dimension, the impact of the family life cycle was apparent in various ways, such as mothers returning to outside work as children age, shifts in handling older children's influence attempts, increases in influences from peers (a rival to IG influence effects), and teens taking over more of the family's purchasing when they begin to drive. Not sur-

prisingly, the incidence of reverse IG flows also accelerates at this time.

### ***The Endurance of IG Influences in Adulthood: Sources with Disruptive Potential***

The long-term impacts of IG influences are felt in adulthood. Prior research has shown that IG impacts initially persist as the child moves away from the family, but that on average they weaken over time. Many factors are at work, some that break down IG patterns and others that sustain them.

*The rise of new influencers: spouse, roommates, and peers.* One of the most striking aspects of change as a young person leaves his or her family involves the new people who will help shape daily living. These "new influencers" literally bring change with them, and the interviews provided many descriptions of this process. In the case of joint purchase decisions, for example, each person arrives with a personal set of beliefs and preferences across products and services. Differences need to be resolved to allow a smooth functioning of the new household's consumption activities (for a useful typology of spousal adjustment mechanisms, see Davis 1976). Discussions with new influencers foster the introduction of additional options and categories for consideration. In a similar vein, joint shopping trips and discussions of personal experiences and preferences bring changes in appropriate criteria for making purchase decisions. Some daughters, for example, use this mechanism to learn about nutritional labels; their new criteria then lead them to shift away from IG brand preferences.

The interviews also presented other interesting dimensions of this general phenomenon. In some cases of apartments with three, four, or five roommates, for example, the role of purchasing agent would be rotated, thus forcing overt consideration of how to handle competing preferences (some of which are IG brands) on each shopping trip. Moreover, in this setting, gifts to one member can unintentionally become a disrupting source for the existing IG preferences of another member (i.e., through a positive product trial experience). Furthermore, not all the new social influences will be positive: Social disdain from peers and media can be a shocking experience for a daughter who holds IG preferences that she learns are not the norm. Finally, at times, overt efforts are made to influence the daughter to conform to practices deemed appropriate by others:

This is a big deal because Meredith always buys the kind that I don't like. I'm so picky. See, at my house we usually get Blue Bonnet or Imperial.... Stacy always buys Parkay, and I can't stand that. (9b7)

I would never buy this on my own because my Mom has never done the boxed spaghetti thing. She always makes it from scratch. I didn't even really know it was available, or if I did, I probably wouldn't think it was very good. But one of my roommates left it and so I ate it one night when there was nothing left to eat, and it was wonderful. So now, I buy it. (6b4)

Brooke went home (and her mother) sent her back to school with so much food, two cases of Diet Coke, tons of frozen food, this thing of Snackwell's, pretzels, a loaf of rye bread—just tons and tons of food. And, then, Katie's parents came to visit and they brought her the two cases of Diet Pepsi. (17a7)

[whispers] I have Spam in my cupboard.... [laughs] I grew up with Spam because ... it's pretty cheap. And there's tons of millions of ways to make it..., but usually what I do is cook it in brown sugar ... or scramble an egg and crush some bread crumbs or whatever ... eat it with macaroni and cheese. (10b11)

Everyone always makes fun of me because my Mom always put Miracle Whip on my sandwiches, instead of mayonnaise. And Kevin always yells at me about stuff like that. (11a11)

*New lives bring shifting lifestyle demands.* Beyond new social interactions, the move away from home can also bring significant alterations in daily living. For many daughters, income constraints and the need to manage money now dictate shifts in choice criteria and brand purchases: Sale prices now serve as a more powerful counterweight to IG brand preferences. Mobility concerns also surface for some daughters, who find themselves constrained to joint shopping or purchasing agent options in which IG preferences are again at risk. Reports also dealt with time at a premium (leading to altered shopping habits) and more personal meal occasions. These led to increased out-of-home dining and fewer supermarket purchases overall. Finally, this is a period of experimentation in general, in which new options are explored. For example, nutritional concerns arose, again threatening existing IG brand preferences:

If I could afford to stick with certain brands I would, but due to my budget I more often than not switch. But I don't really want to, I don't think. (1a4)

My sister called me cheap. We were shopping, and she would get the brand that our family would use, and I'd say, "No Annie, get the cheaper one, get that kind." And I would really compare prices, and she has never seen me like that before.... It wasn't like I was being cheap, I wanted to spend money wisely. (13a9)

Chicken, a vegetable, you know, a balanced meal—My Mom made that a lot, we always had that. I don't eat that now 'cause I don't have time, but I want to. I feel better eating like that, 'cause it's healthier, you know? Ideally I want to do that, but I don't. (3a12)

When I go with her I get the low-fat stuff, and when she goes by herself she'll get the cookies that I like but the regular. And that's a difference between the two of us. I like the low-fat and she likes the regular.... I try to go the more healthy route, more so than she does. (15a4)

*Altered marketplace experiences.* The shift away from home can also involve a physical move to a new marketplace, as had occurred for many in the present sample. This can lead to a lack of IG brand availability (for certain offerings that had been distributed only in the home locality or for low-market share brands that are only thinly distributed). Further disruptions were induced by competitive programs in the new marketplace, including sales promotions, sampling, and premiums. The interviews also reflected positive consumer responses to new products, new information, and new metrics related to purchasing. This entry is a reminder that the dynamic nature of the marketplace generally works to undo IG influences, as new and improved alternatives become available and older line items are dropped.

I used to always use Crest toothpaste. But then, I liked Colgate better because it came with a free toothbrush. (10a10)

I was grocery shopping last week looking for my Mom's pizza sauce, and it wasn't there. So I didn't know what to do. I felt like ... I don't know, I wanted that pizza sauce! (16a10)

I started needing deodorant when I was in fifth grade. My mom introduced me to regular Ban, which was absolutely putrid smelling.... So I dealt with that until I started buying it by myself, and then I started getting the Ocean Breeze scent, which I really liked.... It was still Ban. I don't know why I stayed with it. I used to think that it really worked well, and I was fine with it. But then they discontinued Ocean Breeze. (6b9)

*Other insights on IG disruption.* The final section of Figure 2 on disruptive factors includes some additional observations. First, IG influences based on incomplete knowledge may be more susceptible to disruption in an unsupportive environment. Second, some reports highlighted changes in the family's support for certain IG preferences, because parents changed as their life cycle continued. Behavior is not the only measure of IG, and focus only on changes in behavior can overstate disruptive effects. For example, some of the daughters spoke about having stopped using certain products or services while they were away at school but clearly planned to return to these at a later time. Time and distance away from home are factors in IG endurance in adulthood, when larger distances, times, or lifestyle changes speed IG disruption. Our sample was chosen to allow for the examination of IG persistence when distance from home is high. In the broader population, however, many consumers never move large distances from family: In these cases, some potential disruptors would be less powerful, leading to higher levels of stability.

I only need ... I'm looking around.... If I saw the right brand, I guess I would know it. But I don't see it, and I can't remember what kind my Mom buys. It has a cow on it, or something. (10b3)

I have noticed that since I have been gone that they don't buy as much ... something my sister and I would like—like Frosted Flakes or—foods that are not good for you. Now I'll come home and there's Total and Special K ... healthier things now ... [not] as many chips or anything like that anymore. (14a16)

### ***The Endurance of IG Influences in Adulthood: Sources with Sustaining Potential***

We have just reviewed a lengthy list of forces with the potential to erode the impacts of IG influences in the marketplace. At the same time, we should recall that our survey analyses of IG effects showed that, for a parallel sample of daughters, IG brand and product preferences persist in the marketplace. It therefore became reasonable to identify factors that would be at work to sustain these preferences (as shown in the final section of Figure 2).

*Forces that support repetitive purchase.* Our first category of sustainers relates to many of the factors discussed previously as manifestations of IG influences on repetitive purchasing—IG brands as offering positive levels of func-

tional performance, personal familiarity with the IG brand, purchasing inertia, and low involvement in a particular product or service category. Beyond these points, we also found evidence that in some cases, the daughter encounters feelings of being a "novice" in her new life, perceives risks of making mistakes, and thus encounters risk aversion. The IG brands can offer protection in this respect, and a continued pattern of purchases can lend reinforcement through regularity in the newly uncertain environment. Finally, the spaced but regular appearance of seasonal rituals offers support for continued enactment of favored IG behaviors:

When I first started, I probably purchased them a lot because I didn't really know what else to buy, and I knew that those would be healthy for me 'cause she always chose things that were healthy for us. And I knew that I liked them, and I didn't want to go wrong 'cause I knew that it was my own money. (7a9)

I bought this squash just because my Mom makes squash a couple times in the fall and I love it. I have no idea what to do with it.... I'm going to call my Mom and figure out what to do with this. (17a20)

**Maintenance of self-identity.** During life transitions, a sense of self is called on in dealing with (new) sets of outside pressures and opportunities. As noted in the "Marketplace Manifestations" section of the framework, IG influences can be closely bound to the daughter's self-identity and thus are themselves sustained by these ties. Six aspects related to this factor appeared in the interviews. For some daughters, a desire to retain and express an ethnic identity meant that several IG influences would be brought into play on a continual basis. For other daughters, pursuit of a particular set of IG lifestyle activities brings a similar impact. For daughters whose self-identities involve being an athlete or being a vegetarian, for example, continued reliance on IG food preferences provides a useful means of support. These particular lifestyles themselves constrain choice criteria (and, in effect, remove the consumer from some sources of IG disruption, such as marketing promotions or peer influences for forbidden foods for that lifestyle). Meanwhile, IG brands can be "safe harbors," allowing daughters to experiment with new marketplace offerings while preserving an attachment to the reliable IG brand.

External expression also lies within this province. For some daughters, influence attempts on others help communicate more about who they are. This appears to be a fairly common phenomenon, especially when family backgrounds are quite different. Our final two entries, however, are less common. Loosened constraints associated with living on one's own allows for increased expression of self-identity: In a few cases, we found that this also allowed a return to purchasing an IG-preferred brand that had been suspended earlier. Finally, expression of self-identity can also motivate efforts to stimulate a reverse flow of IG influence, bringing parents back to brands recalled fondly from childhood.

My mom always bought Prego spaghetti sauce. So, I used to buy that a lot. I still do. Although recently, I tried something different because it was healthy, Healthy Choice. So I tried it, it was pretty good. (8a7)

And bagels are important. Big and Crusty bagels because they remind me of, you have to have—I'm going to bring

back real, real bagels—just because I think that everybody needs to experience a real bagel. Yeah, you guys need to experience the real New York deli bagel. I'll do that over Thanksgiving. (9b9)

We always used to use Crest and now I go home and I find all these other brands that I've never even heard of. Imposters! Like, Pepsodent, like someone in my house is using that, and that tooth lightening stuff and all this stuff. We used to only buy Crest. (3a16)

**Parents as IG sustainers.** The family also emerged as a major sustaining force. In a few cases, a daughter indicated that her continued patronage of an IG brand symbolized a continuing loyalty and affiliation with parents. Parental proximity allows continued support from personal visits and interactions, and family shopping outings, though now less frequent, also serve as significant reinforcers. Furthermore, parents continuing to act as product suppliers (now as gifts) not only reaffirms the IG brand choice but also temporarily removes the daughter from competitive purchase temptations. In some cases, daughters also reported receiving coupons from parents to ease their continued IG patronage and/or indicated that further parental influence attempts continue to occur in adulthood.

I buy things that my Dad buys. I like my Dad. (1a18)

My Mom and I are very, very, very close. I mean I can tell her everything, you know, and when I go home, she and I always go out and do the lunch and shopping afternoon thing.... I don't get to see them very much. But when I'm home, she and I try to do things together like going grocery shopping. (15a3)

My parents stock me up. Last time I went home, I came back with so much food, I filled up my cabinet and had to start a new one. Because she (mother) said "I know you won't go down there." So, I don't have to go grocery shopping. (18a14)

I go for the Near East brands, stuff like couscous. That's really expensive usually. So, I have 15 coupons for that. My Mom sends me coupons a lot. (9a4)

We had Stove Top tonight from this huge canister. We didn't know how to make small servings so we just followed the directions, and ended up with six servings of it. See, my parents came down a few week ago and asked "Do you want to go to Sam's Club?" Then we were going through the aisles and they asked "Don't you eat Stove Top?" And I said, "Not really." And they're, "Just get it." So I really didn't pick that out. They just threw it in the cart. (16a12)

## Integrating the Studies: Conclusions and Implications

### **Managerial Implications**

**Overall recommendation:** IG audits for product categories and brands. As we discovered in Study 1, IG effects are clearly selective by category and by brand. For some products, IG helps determine segments of users and nonusers among young adults. Within most categories, moreover, some brands benefit from strong IG support, and other equally well-known brands do not (see, e.g., Bumble Bee versus Chicken of the Sea tuna in Table 1). Our limited



sample provides no direct basis for managerial action. However, our research points to the managerial need for a customized "IG audit" of the marketplace and offers guidance for this undertaking. The approach we developed for Study 1 can provide answers to such questions as, "Are IG effects at work in the category?" and "If so, which brands are benefiting from this influence and which are not?" The approach in Study 2 can also be used to shed more light on the nature of IG within a specific category—how it is perceived by young adult consumers, as well as how it is sustained and/or disrupted as in-store shopping proceeds. Moreover, because this IG audit can concentrate on a single category, diagnostics not attempted in this article are also possible, including classifying IG buyers for competing brands, identifying bases of brand competition, and discovering roots of IG influences in this category.

When an IG effect on brand equity is established, the marketing team can gear its strategy toward the twin goals of combating key IG disruptors and supporting IG sustaining forces (as in Figure 2). As evidenced in Study 2, IG-loyal consumers can be allies in this effort. Also, the IG audit's findings should offer further input for marketing-mix decisions, beyond those suggested subsequently.

*IG implications for product decisions.* An IG effect can represent a fundamental mechanism for extending a brand's life cycle and thus become a special advantage or asset. In Study 2, we frequently encountered dual drivers at work in the IG sphere: desires for both future (e.g., new technology, new benefits, new delivery modes) and past (e.g., familiarity, safety, warmth). Therefore, a key brand challenge is to manage change—to provide an offering that appeals to the young adult's desire for familiarity and stability but also incorporates the needed product improvements, updates, and modifications to stay current in today's marketplace. In the present study, for example, daughters' desire for ease of preparation generally exceeded that of their mothers, as did their interest in nutritional dimensions. This appears to offer opportunities for innovation but also calls for sensitivity to evolutionary rather than revolutionary change in managing strong IG brands.

Beyond updating the core product, brand extensions are also a natural option. For example, some opportunities that arose in our studies would involve extensions appealing to differential IG lifestyle preferences of young adults (e.g., vegetarian diets). In a related vein, Wansink (1997) argues that mature brands can be revitalized through strategies such as suggesting new uses (e.g., Campbell's Soup as a sauce). More generally, umbrella branding strategies should be strongly considered when there is evidence of a favorable IG effect. In contrast, Study 2 pointed to cases in which a brand extension decision left its IG-loyal buyers stranded: Measures to direct them to favored alternatives might also be considered. Finally, managers might seek opportunities to help create IG preferences for a brand's future, such as through package design. Because some of the child's learning of IG brands may be incidental (i.e., repeated observations of the package during home use), marketers can attempt to capitalize by developing interest and uniqueness here, such as with Heinz squeeze bottles of green ketchup. Finally, to help sustain IG among young adults, Study 2 showed that some brands could retain sales if

smaller packages were available, reflecting younger IG consumers' smaller households and income constraints.

*IG implications for pricing decisions.* The monitoring of purchases in Study 2 showed that IG effects are often disrupted by younger consumers' income constraints. It may therefore be worthwhile to seek ways to adjust prices creatively to convert IG preference effects into continued purchase behavior. As noted, smaller packages may help the brand fit into the budget. Furthermore, the implementation of database or other micromarketing techniques could assist in the design of selectively targeted sales promotions to IG-loyal younger consumers, thereby effectively reducing the price they pay. This approach may be especially appropriate for upper-tier brands, that is, prestige brands that younger consumers may consider a luxury at this point in their lives and that are most susceptible to loss of sales.

*IG implications for place-related decisions.* The Study 2 interviews also made it clear that brand availability is fundamental to sustaining an IG effect. At regional or local levels, zip clustering and/or localized surveys can be used to identify the stores that young IG-prone consumers patronize: Special programs could then be targeted through these outlets. For smaller IG-favored local brands that are unavailable in the young adult's new region, seasonal home promotions (e.g., "stock-up" for back to school), parental suggestive selling (e.g., "Give your daughter her favorite reminder of home"), or a link to "gift-pack" programs run by campus or neighborhood entrepreneurs are all options. Given the IG loyalist's penchant for word of mouth, specialty goods might consider extending local distribution by enlisting some of these young loyalists in an entrepreneurial sales or referral enterprise.

Finally, the Internet is already an accepted presence in young consumers' lives and offers several additional managerial possibilities. For example, our study showed many daughters encountering difficulties in locating favorite brands. If distribution is incomplete in a region, Internet information showing exactly which stores carry the brand (and even where in each store) would be welcomed by young shoppers. Also, the availability of the brand on Web-based e-tailing sites would help IG loyalists sustain their brand preferences, particularly for specialty goods (e.g., ingredients for a favorite recipe).

*IG implications for promotion decisions.* Our present studies did not focus directly on promotion decisions, but several possibilities can be deduced for consideration. Perhaps the most obvious implication of IG for advertising strategy is that the brand could be promoted to the entire household, or at least to the specific IG dyads within it. Media vehicles can be used to serve this purpose, and on the creative side, ad executions depicting families consuming the brand together can help both develop and reinforce IG bonds. Casual monitoring indicates that advertisements that invoke IG brand ties and loyalties are not uncommon (e.g., Ivory soap, Crest toothpaste, Dewar's scotch, Frigidaire dishwashers, Werthers' candy). Also, appeals to nostalgia might invoke symbolic "family allegiance" for younger members who have left home, and aspirational appeals for

upper-tier brands (coupled with price promotions) may also keep younger loyalists from abandoning a favored brand.

Beyond advertising, sales promotion might also be used to fortify IG brand use. Loyalty programs targeted at young adults may help sustain purchase patterns. Furthermore, promotional programs could also be directed toward younger members of the household to build IG loyalty earlier in life. Finally, social influence—both giving and receiving—is part-and-parcel of an IG effect. Brand promotions providing IG-loyal consumers with information that has news value (e.g., a new technology) can create “buzz” (Dye 2000) and lead to positive word-of-mouth influence attempts.

Theoretically, above all is the significance of unique, favorable, and strong brand associations in equity building (Keller 1998). As noted previously, the brand audit represents an important first step for determining whether IG effects are at work. A key component of the audit should be to analyze the nature of the IG connection, as it is reflected in the set of family-related brand associations. Then, as creative judgments for new campaigns are developed, managers need to be especially vigilant in nurturing and protecting the specific associations that define the IG bond.

### ***Implications for Further Theoretical and Research Consideration***

The present project also raises several points that are worthy of further consideration by academics and practitioners who want to delve further into this intriguing area. These arise in two sectors: (1) extensions of IG research on brand equity issues and other emerging research streams in marketing and (2) development of concepts and methods in the IG area itself.

*Extensions of research on brand equity issues.* The most prominent findings in the current article involved the selectivity in IG impacts at both product category and brand levels: IG appears to influence usage or nonusage of some products, but not others, and it appears to provide “free” brand equity for some brands, but not others. Note that these are different types of effects. First, our findings of a learned IG impact on use/nonuse decisions means that the size and scope of some markets of the future are being partially determined in households today, as children learn to avoid certain products and services while pursuing others. It would be worthwhile to understand more broadly which products are subject to this IG usage effect, which ones are not, at what ages these product usage effects are being developed, and how long they are likely to persist in adulthood. Second, research on selectivity at the brand level is also needed—for example, what distinguishes brands that benefit strongly from IG effects from those that do not? Third, the research methods we employed for Study 1 revealed considerable complexity deserving additional attention in future research. Issues here include (1) comparison of single-informant versus dyadic measurement, (2) alternative means of adjusting for marketplace characteristics that affect IG scores, and (3) appropriate levels and boundaries of product category definitions to include in IG studies. With respect to this last point, for example, we note that the two strongest IG nonuse findings were for narrow

forms of broader product classes, frozen juice and canned vegetables. Although this is a useful IG finding in pointing to the learning of specialized practices, it is not obvious what it might portend for brand equity carryover across different forms of a single category. Finally, although this project has provided strong evidence on some important issues for brand equity, it has not provided answers regarding how long such IG effects are likely to persist or which specific consumer or family factors are especially strong contributors to this phenomenon. These issues could be addressed through approaches similar to Study 1, but with adjustments to incorporate different age groups of adults (for persistence) and/or several household characteristics at the expense of fewer product categories and brands.

The IG research here also provides potential for enhancing studies of market segmentation, as well as rich potential for certain other emerging streams of work in marketing and consumer behavior. With respect to segmentation, our depiction in Study 1 of how high-IG brands exist in the competitive marketplace could offer new strategic insights on marketplace competition. For example, the status of certain brands as cultural icons (i.e., high-IG brand equity from a huge segment of households across the society) is a qualitatively different situation from that in which a single brand receives strong IG support, but from a smaller portion of the market. Moreover, both can be sharply differentiated from our discovery of brand silo markets, in which several brands receive depth of support, but from different households in the marketplace (in this regard, our current approach did not allow exploration of brand-switching behaviors or of portfolios of purchases, both of which should add considerable insights to these phenomena). Also, it would be of interest to determine if and how the silo phenomenon, here defined in terms of exact preference matches, could extend to other components of brand equity, particularly brand associations (Aaker 1991; Keller 1998). This would stretch our understanding of the IG effect into brand memory networks, or consumers’ mental maps of the marketplace.

Meanwhile, the findings in Study 2 could easily link to such promising developments as relationship marketing (e.g., Sheth and Parvatiyar 2000) and consumer relationships with brands (e.g., Fournier 1998), as well as the revitalization of mature brands (e.g., Wansink 1997). Also, IG effects might be pursued as a special case of Muniz and O’Guinn’s (2001) brand communities, wherein social groups form around certain brands and socialize and bolster individual consumers’ brand preferences. Finally, in estimating the lifetime value of a customer (e.g., Berger and Nasr 1998; Talukdar 1999), these findings on IG effects add the intriguing suggestion of a household level of carryover impact. If feasible, this step should add significantly to value calculations, as well as the validity of resulting estimates. Furthermore, all these areas, along with brand equity, should benefit from advances in the IG area.

*Exploring IG influence itself.* In this project, we have encountered several elements of IG in addition to those reflecting brand equity. It has taught us many lessons regarding the origins and essence of the IG phenomenon. At the broadest level, IG influences in the consumer context represent specific elements of learning, stemming from consumer socialization, that have become tied to a young person’s self-identity and are

carried into adulthood. As a research area, its complexity has already been noted, but several useful insights into that complexity have been advanced here. Rather than seek simplicity at this point, we acknowledge the complexity of IG as a welcome challenge for future discoveries. In this regard, Figure 2 is intended as a significant conceptual step forward in explicating some key dimensions of IG influences as we encountered them in this project. Beyond those from Study 1, we shift emphasis to the research challenges that emerged in Study 2. Among these, we highlight the following for future attention:

•*How IG is manifested in the marketplace:* We raise the following as among the most significant elements in Figure 2's "Marketplace Manifestations" section: (1) IG might be evidenced at times as a low-involvement, repetitive heuristic, but at other times as a higher-involvement, emotional, or symbolic bond; (2) IG can offer protection against purchase risks in the marketplace; (3) IG can also be sharply negative toward a brand or product; (4) IG might easily extend to multiple product versions and perhaps multiple brands in some categories; and (5) IG extends to various aspects of personal consumption behavior, including beliefs, shopping habits, price preferences, and so forth.

•*The bidirectionality of IG influences:* Deserving of separate mention is the matter of the reverse flow of IG effects, in which a younger family member influences a parent's views and behavior. This was not easily distinguished in the present project but was noted sufficiently often in Study 2 to convince us that much closer attention is warranted, especially during the teenage years and early adulthood. Products incorporating new technologies or innovations are likely to be especially susceptible to this phenomenon.

•*IG development across heterogeneous households and long time frames:* Although not a major focus here, Figure 2's "Factors in the Formation of IG Influences" section reflects both the heterogeneity of households' lifestyles and the richness of years of daily exposures. This supports views of IG effects as (1) based on a large number of consumption episodes; (2) occurring across a long span of time, as the son or daughter becomes increasingly independent; and (3) often actively generated through negotiation or other adaptations and thus reflecting personal preferences as well as media and peer influences. In brief, some IG effects are based on considerable cognitive and emotional investment and are not at all fragile.

•*Potentials for reemergence of IG later in life:* Somewhat in contrast to the preceding point, some IG preferences are age-defined during childhood (e.g., kid's cereals, early teen cosmetics) and will not persist into adult purchase behaviors. They may return in later years, however, as parental role enactments become appropriate.

•*Diagnostic challenges in the detection of IG:* Implicit in the preceding is the recognition that much of IG influences lies beyond overt purchasing behavior and may not be reflected only in the types of measures we employed in Study 1. In some sense, then, the use of a survey technique alone may risk understatement of actual brand equity levels or other IG effects that exist. Furthermore, the marketplace is dynamic, and mothers adapt as well. Therefore, investigation of both generational cohorts during adulthood is an interesting option, especially if study of their mutual flows of influence over this time period is incorporated as well.

•*The persistence of IG over time:* Figure 2's "Endurance in Adulthood" section shows that the forces here are real factors in both new households and in-store environments. This section should also be useful in designing future studies on IG persistence: Some reasonable level of survey quantification seems possible, given that various entries here can be identified as conditions that either are or are not present or can be classified according to what degree they apply. Although IG effects are generally believed to be about stability, the larger context of their application is about change over time and about how adaptation into adulthood is managed. As construed here, both disruptive and sustaining forces are present and active over many consumption episodes. This suggests that IG influences are likely in flux over time and that gradual weakening or strengthening of IG effects are alternatives to simple persistence or cessation.

Overall, our appreciation for the complexity of this research area has certainly increased over the course of our investigation. With respect to our initial question, it is clear that IG is an important source of brand equity in today's marketplace, but only for some brands and not for others. It has also become more obvious why IG influences should be present across the marketplace and why they can be significant sources of influence on consumer behavior. In closing, it is clear that the topic of IG influence encompasses a rich set of phenomena and is deserving of further attention by the marketing community.

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