

Conceptual and operational aspects of brand loyalty An empirical investigation

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Abstract

The objective of this article is to stress the lack of valid and reliable measures concerning loyalty, and then to conceive, test and validate a relevant measurement procedure of this concept, by following a rigorous methodology based on the Churchill paradigm [Churchill GA. A paradigm for developing better measures of marketing constructs. *J Mark Res* 1979;16(1):64–73]. In the first part, the authors will approach problems linked to the conceptualization and to the operational aspects of loyalty in the literature. This synthesis will lead to a proposal of differentiation of the repeat purchasing behavior by the concept of brand sensitivity. The second part will deal with methodological aspects and will present the main results of this research. Finally, the article concludes on the contributions and limits of this study, as well as on future research perspectives. © 2001 Elsevier Science Inc. All rights reserved.

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“The success of a brand on the long term is not based on the number of consumers that buy it once, but on the number of consumers who become regular buyers of the brand.” This sentence (Jacoby and Chestnut, 1978, p. 1) clearly illustrates the importance for companies to put the emphasis on their customers’ loyalty. Early on, academic research has also been conscious of the central role played by the loyalty concept in the consumer-buying process, to such a point that more than 300 research papers (Jacoby and Chestnut, 1978), published or not, have dealt with the study of this concept. The literature brings out two approaches that apprehend loyalty in two different ways: the stochastic approach, which is purely behavioral, and the attitudinal approach that considers loyalty as an attitude. Besides the numerous divergences about the real nature of this concept, the literature is characterized by the multitude of available operational definitions, and by the contradictory results obtained using the techniques developed to measure loyalty. These contradictory results can notably be explained by the

almost systematic lack of a rigorous study of the reliability and the validity of the proposed measurement instruments.

The objective of this article is to stress this lack of valid and reliable measures concerning loyalty, and then to conceive, test and validate a relevant measurement procedure of this concept, by following a rigorous methodology based on the Churchill paradigm (1979). In the first part, we will approach problems linked to the conceptualization and to the operational aspects of loyalty in the literature. This synthesis will lead to a proposal of differentiation of the repeat purchasing behavior by the concept of brand sensitivity. The second part will deal with methodological aspects and will present the main results of this research. Finally, the article concludes on the contributions and limits of this study, as well as on future research perspectives.

1. Brand loyalty: operational and conceptual aspects

The literature on the loyalty concept is characterized by two divergent streams of research: the stochastic approach and the deterministic approach. As a consequence of this divergence, a review of the literature highlights the lack of clarity about the conceptual nature of loyalty, and also the

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large variety of the results obtained using the numerous existing measurement tools.

1.1. Loyalty: behavior or attitude?

1.1.1. The stochastic approach

For the defenders of the stochastic approach, loyalty is a behavior: the individual that buys the same brand systematically is said to be loyal to this brand. The problem lies in the fact that the stochastic approach considers loyalty behavior as being inherently inexplicable, or too complex to be comprehended: the number of explanatory variables as well as their frequency of appearance makes any explanation of this behavior impossible (Bass, 1974; McAlister and Pessemier, 1982). There is a major disadvantage of such a point of view: it implies that it is difficult for a company to influence repeat purchasing behavior, as this company has no knowledge of the actual cause of loyalty.

1.1.2. The determinist approach

The main postulate of the determinist approach is that there exists a limited number of explanatory factors generating loyalty: the researcher can isolate these factors and thus can manipulate them. In the framework of this approach, brand loyalty is treated more as an attitude. The researcher investigates the psychological commitment of the consumer in the purchase, without necessarily taking the effective purchase behavior into account (e.g., Jacoby, 1969, 1971; Jacoby and Olson, 1970; Jarvis and Wilcox, 1976).

Reconciling the two approaches, Jacoby (1971) proposes to integrate the two notions of behavior and attitude within a same conceptual definition. He is the first author to propose a six points definition that integrates behavioral and attitudinal loyalty, and that will influence the definitions proposed later by Engel et al. (1978). According to Jacoby and Kyner (1973), brand loyalty is the “(1) biased (i.e., non-random) (2) behavioral response (i.e., purchase) (3) expressed over time (4) by some decision-making units (5) with respect to one or more alternative brands out of a set of such brands and is (6) a function of psychological (decision-making, evaluative) processes.”

1.2. Operational definition

Measures of brand loyalty are so numerous and varied in the literature that it would be too long to give an ordered and exhaustive list of them.¹ However, three observations can be raised with regards to existing measures. In general, it is worth noting the high heterogeneity in the results obtained using the different instruments. Moreover, the development of brand loyalty measures fails by the lack of investigation

of their reliability and their validity, despite the attempts of Olson and Jacoby (1971) to verify the reliability of some instruments using the test–retest technique. Finally, the operational definition is often developed without any preliminary reflection on the conceptual nature of brand loyalty: this could also explain the diversity of existing measures, which are often “irrational and arbitrary” (Jacoby and Chestnut, 1978, p. 41).

Following a behavioral or an attitudinal approach, each of them possesses its advantages and drawbacks, that will be highlighted in the next paragraphs.

1.3. Advantages and limits of existing measures

The major interest of behavioral measures resides in the fact that they measure effective behaviors. However, they do not enable the researcher to tell whether repeat buying has been done out of habit, for situational reasons, or for more complex psychological reasons. Furthermore, the processing of loyalty is made in a dichotomous way — loyalty vs. disloyalty — which is singularly short of nuance, and requires a very arbitrary judgement as for the allocation of a consumer to one or the other of the two categories.

As an example, Fig. 1 presents the study of loyalty for four consumers, according to two measurement methods.

In the example reported in Fig. 1, the use of the percentage of purchase corresponds to the way Cunningham (1956a,b, 1967) measures brand loyalty, that is to say by the purchase proportion of a same brand on a same sequence of purchase (incidentally undetermined). The problem of this measure is that it fixes an arbitrary loyalty threshold: above 50% of purchase proportion devoted to the same brand, the author estimates that there is brand loyalty. Following a slightly different approach, Tucker (1964) and McConnell (1968) propose the “3 in the sequence” criterion: the consumer is said to be brand-loyal when the sequence of purchase includes consecutively three identical brands. As shown in Fig. 1, the measurement methods used in this example do not converge to a same result: as an example, consumer 1 is loyal in the framework of the percentage of purchase, but unloyal using the “3 in the sequence” procedure.

Determinist measures allow to circumvent a certain amount of criticism addressed to behavioral measures. In the first place, most of them are constructed around interval type scales, which facilitate data collection. Moreover, attitudinal scales are no longer based on a loyalty/disloyalty opposition, but on a degree of loyalty: thus, the goal is not to know whether an individual is absolutely loyal or not, but to know the intensity of his loyalty to a branded product; the nuance of this type of scales is therefore far more important.

Despite these advantages, this type of scales suffers from some major drawbacks. The first criticism to be addressed to this group of measures is that it only relies on consumer declarations, and not on the observed beha-

¹ The reader interested in a detailed presentation of existing measurement tools might consult Jacoby and Chestnut (1978) or Filser (1994).

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