

chapter

# 13

## Situational Influences

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## LEARNING OBJECTIVES

**L01** Define *situational influence*.

**L02** Explain the four types of situations and their relevance to marketing strategy.

**L03** Summarize the five characteristics of situations and their influence on consumption.

**L04** Discuss ritual situations and their importance to consumers and marketers.

**L05** Describe the use of situational influence in developing marketing strategy.

Did you realize that companies change their marketing tactics geographically depending on the weather and how it is changing? How weather is *changing* is the critical part here because it creates “situations” into which marketers can offer their products as solutions. For example, when temperatures are temporarily *colder than usual*, consumers will deviate from their normal purchase pattern. Sometimes this means buying more of a certain item such as Campbell’s Slow Kettle Style Soup to provide a nice hot meal on a cold winter’s day. Sometimes this means buying different products such as a heavier jacket.<sup>1</sup> Planalytics is a major global player in helping marketers track and react to changing weather situations. It is a geographically based system that looks at what we will later term “momentary conditions.” Planalytics offers a Weather-Driven Demand (WDD) approach, which they describe, in part, as “a numerical representation of the consumer need for a product or service caused by perceived changes in the weather at a time/location intersection.” This perception change by time/location intersection creates a situation of which marketers attempt to take advantage. As Planalytics’ COO states:

That’s where the marketing gold that needs to be mined is. Marketing into a situation that’s favorable to your product [causes] the numbers to go off the chart.

Examples of clients who use Planalytics to adjust their marketing efforts include

- *Campbell Soup*. Campbell Soup has created a “misery index” that is based on weather changes, such as within day, within week, year over year, and so on, with bonus points for snow or rain. When the misery index hits a certain mark, Campbell will deliver chicken soup ads to that market. It has over 30 such geographic markets that it tracks and targets in this way and is also in the process of creating a flu index.
- *Lands’ End*. This global retailer uses weather information to plan and forecast inventories, tweak merchandising and promotional offerings, and so on. It also examines historical demand as a function of “unusual” weather patterns and discounts future estimates accordingly. So, for example, if there was an unusually hot spring season in the United Kingdom one year, with sales of certain items (e.g., light apparel such as shorts) being high, they will discount next year’s estimates accordingly to avoid having overstocks.

New media options are available as well. Google can track “trending” weather-related phrases such as “hot chocolate” and launch appropriate “new search campaigns within hours.” So, what’s your weather situation?

As the model we have used to organize this text indicates, the purchase decision and consumption process always occur in the context of a specific situation. Therefore, before examining the decision process, we must first develop an understanding of situations. In this chapter, we will examine the situations in which consumption occurs, the way situations influence consumption behaviors, key characteristics of situations, the nature of ritual situations, and situation-based marketing strategies.

## THE NATURE OF SITUATIONAL INFLUENCE

L01

Consumers do not respond to stimuli such as advertisements and products presented by marketers in isolation; instead, they respond to marketing influences and the situation simultaneously. To understand a consumer's behavior, we must know about the *consumer*; about the primary *stimulus* object, such as a product or advertisement to which the consumer is responding; and about the *situation* in which the response is occurring.<sup>2</sup>

We define **situational influence** as *all those factors particular to a time and place that do not follow from a knowledge of the stable attributes of the consumer and the stimulus and that have an effect on current behavior.*<sup>3</sup> Thus, with one exception, the situation stands apart from the consumer and the stimulus. The exception is in the case of *temporary* (as opposed to stable) characteristics of a consumer or stimulus that are specific to the situation and sometimes even caused by it. For example, a consumer may generally be upbeat (stable trait), but just prior to viewing a firm's ad sees a disturbing news flash that puts her in a bad mood. This bad mood is a transient state (situational factor) caused by the surrounding media context in which the focal ad appears. Other such temporary conditions include illness and time pressure. Consumer involvement also includes a situation-specific component. That is, some consumers are involved only when they have to make a purchase.

A key marketing finding is that consumers often react and behave very differently depending on the situation. We discussed some of these effects in earlier chapters. For example, an ad or in-store display that might otherwise attract consumer attention may not do so in a cluttered environment (Chapter 8). Or an ad that might be persuasive in a non-purchase situation may be much less persuasive in a purchase situation where consumers are on the market to buy (Chapter 11). The interplay between situation, marketing, and the individual is shown in Figure 13–1.

Consumer behavior occurs within four broad categories or types of situations: the communications situation, the purchase situation, the usage situation, and the disposition situation.

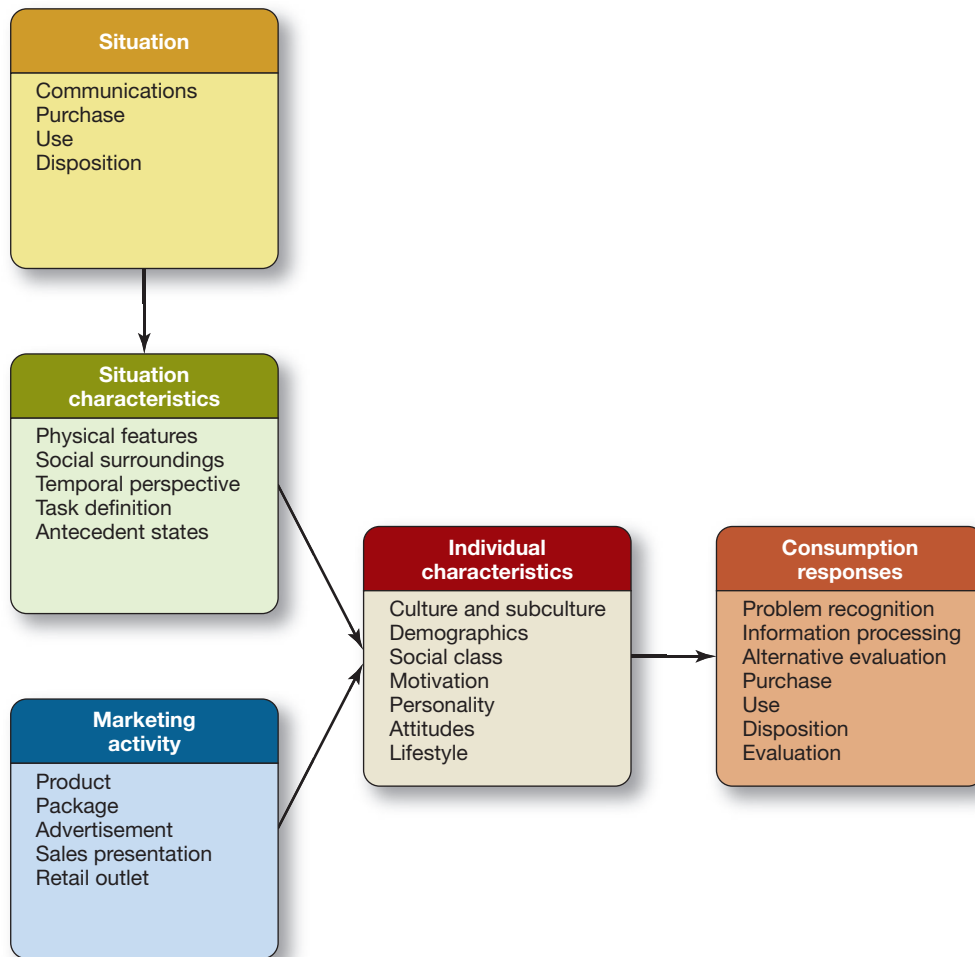
### The Communications Situation

L02

The situation in which consumers receive information has an impact on their behavior. Whether one is alone or in a group, in a good mood or bad, in a hurry or not influences the degree to which one sees and listens to marketing communications. Is it better to advertise on a happy or sad television program? A calm or exciting program? These are some of the questions managers must answer with respect to the **communications situation**.<sup>4</sup> Marketers often attempt to place their ads in appropriate media contexts to enhance their effectiveness. Some even go so far as to mandate that their ads be “pulled” when programming content negative to their company or industry will appear. Recent examples include Morgan Stanley and BP. *What are the ethical implications of such policies?*<sup>5</sup>



A marketer is able to deliver an effective message to consumers who are interested in the product and are in a receptive communications situation. However, finding high-interest potential buyers in receptive communications situations is a difficult challenge.

The Situation Interacts with the Marketing Activity and the Individual to Determine Behavior **FIGURE****13-1**

For example, consider the difficulty a marketer would have in communicating to you in the following communications situations:

- Your favorite team just lost the most important game of the year.
- Final exams begin tomorrow.
- Your roommates watch only comedy programs.
- You have the flu.
- You are driving home on a cold night, and your car heater doesn't work.

## The Purchase Situation

The situation in which a purchase is made can influence consumer behavior. Mothers shopping with children are more apt to be influenced by the product preferences of their children than when shopping without them. A shortage of time, such as trying to make a purchase between classes, can affect the store-choice decision, the number of brands considered, and the price the shopper is willing to pay. At an even more basic level, whether or not a consumer is in a “purchase mode” influences a whole host of behaviors from advertising

responses to shopping. Consider, for example, how differently you might behave at Best Buy if you were there only to browse versus being there to replace a broken Blu-ray player.

Marketers must understand how **purchase situations** influence consumers in order to develop marketing strategies that enhance the purchase of their products. For example, how would you alter your decision to purchase a beverage in the following purchase situations?

- You are in a very bad mood.
- A good friend says, “That stuff is bad for you!”
- The store you visit does not carry your favorite brand.
- There is a long line at the checkout counter as you enter the store.
- You are with someone you want to impress.

## The Usage Situation

What beverage would you prefer to consume in each of the following usage situations?

- Friday afternoon after your last final exam.
- With your parents for lunch.
- After dinner on a cold, stormy evening.
- At a dinner with a friend you have not seen in several years.
- When you are feeling sad or homesick.

Marketers need to understand the **usage situations** for which their products are, or may become, appropriate. Using this knowledge, marketers can communicate how their products create consumer satisfaction in each relevant usage situation. For example, a recent study found that consuming two 1.5-cup servings of oat-based cereal a day could lower cholesterol. How could General Mills take advantage of this finding to increase sales of its oat-based cereal Cheerios? A recent ad depicts a dad coming home late from work and having Cheerios for dinner. When asked why by his young daughter, he replies, “Because they taste just as good at night.”

Research indicates that *expanded usage situation* strategies can produce major sales gains for established products.<sup>6</sup> Coach went away from the traditional two-occasion (everyday and dressy) approach to handbags and moved toward what it calls a “usage voids” approach. Now Coach offers a wide range of products, including weekend bags, coin purses, clutches, and wristlets in a variety of colors and fabrics. The goal is to get consumers more attuned to the various usage situations available in which to accessorize and then create bags to fit the situations.<sup>7</sup> Dunkin’ Donuts found that over half of donut consumption was for breakfast, but roughly 34 percent was for nonbreakfast snacks. In response, the company has

created simple yet imaginative make-at-home snack and dessert recipes, such as Cocoa Donut and Strawberry Grilled Cheese, to encourage consumers to think of and use the company’s products in new ways. [They are also tapping the specialty occasions market with] limited-time offers, such as the heart-shaped Valentine’s “Cupid’s Choice.”<sup>8</sup>

The GoGo Squeez ad in Illustration 13–1 provides another example of a company trying to expand the usage situations for its brand.

## The Disposition Situation

Consumers must frequently dispose of products or product packages after or before product use. As we will examine in detail in Chapter 18, decisions made by consumers regarding

the **disposition situation** can create significant social problems as well as opportunities for marketers.

Some consumers consider ease of disposition an important product attribute. These people may purchase only items that can be easily recycled. Often disposition of an existing product must occur before or simultaneously with the acquisition of the new product. For example, most consumers must remove their existing bed before using a new one. Marketers need to understand how situational influences affect disposition decisions in order to develop more effective and ethical products and marketing programs. Government and environmental organizations need the same knowledge in order to encourage socially responsible disposition decisions.

How would your disposition decision differ in these situations?

- You have finished a soft drink in a can at a mall. There is a trashcan nearby, but there is no sign of a recycling container.
- You have finished reading the newspaper after class, and you note that you are running late for a basketball game.
- You and two friends have finished soft drinks. Both your friends toss the recyclable cans into a nearby garbage container.
- A local charity will accept old refrigerators if they are delivered to the charity. Your garbage service will haul one to the dump for \$15. You just bought a new refrigerator. You don't know anyone (or you do know someone) with a pickup or van.



ILLUSTRATION 13-1

Many products become defined for particular usage situations. Firms that are able to expand the range of usage situations deemed appropriate for their brands can capture significant sales gains. This GoGo Squeeze ad is attempting to show how its applesauce can be consumed in various situations.



## SITUATIONAL CHARACTERISTICS AND CONSUMPTION BEHAVIOR

The situations discussed above can be described on a number of dimensions that determine their influence on consumer behavior. The five key dimensions or characteristics are physical surroundings, social surroundings, temporal perspectives, task definition, and antecedent states.<sup>9</sup> These characteristics have been studied primarily in the United States. While the same characteristics of the situation exist across cultures, a marketer should not assume that the response to these characteristics would be the same. For example, a crowded store might cause a different emotional reaction among American consumers than among consumers in India.<sup>10</sup>

L03

### Physical Surroundings

**Physical surroundings** include decor, sounds, aromas, lighting, weather, and configurations of merchandise or other materials surrounding the stimulus object. Physical surroundings are a widely used type of situational influence, particularly for retail applications. Consumer Insight 13–1 sheds further light onto one aspect of the physical retail environment, namely mannequins.





## Mannequins, More Than Just Store Dummies

Perhaps equally as true as the statement “the clothes make the man”<sup>11</sup> is the statement “the mannequin makes the clothes.” Forty-two percent of consumers polled in a recent study stated that what they saw displayed on a mannequin influenced their purchase decision.<sup>12</sup>

With the forecast that “All department stores will become museums, and all museums will become department stores,” threatening to become ever more real with online retail encroachment into their sales, brick-and-mortar stores are fighting back with an army of mannequins. The plain white faceless, sometimes headless, torso mannequin that quietly blended unnoticed into the background has been replaced with a new breed of mannequins that scream with attention-arresting poses, and astoundingly realistic physical features.

To be more than the colorless, uniform clothes-hanger mannequins of yesteryear, mannequins today are being created to personalize the brand. For example, Nike mannequins come alive in action poses to communicate the energy and dynamism of athleticism, and the runway model poses of Guess mannequins exemplify fashion sophistication and confidence.

Mannequins have long been the silent salespersons, ranking third, after friends and family, in influencing purchasing behavior. It turns out that realistic, larger-sized mannequins are better sales people. Recent research shows that women are three times more likely to buy clothes when they see them on a mannequin related to their size. Macy's, Nordstrom, and the British Debenhams department stores are using or report plans to use more realistic, full-bodied mannequins. Developed after an extensive study that involved scanning thousands of women's bodies to arrive at a better understanding of

women's proportions, the mannequins in David's Bridal, the largest chain of bridal stores in the United States, have thicker waists and realistic imperfections.

Another trend in mannequin realism centers not so much on creating more realistic body types, but on providing mannequins with realistic details including pierced ears, tattoos, movable limbs to better display clothes, and articulated fingers to better show off rings. Mannequins have progressed beyond being a silent salesperson. Some mannequins are also data collectors. EyeSee Mannequins are traditional-looking mannequins, except they have eyes fitted with a camera lens that captures data on passersby. The data are fed to facial recognition software; mined for shoppers' age, gender, and ethnicity; and used in forecasting models to develop marketing campaigns and store displays. Mindful of consumer privacy, EyeSee mannequins do not record or send data of a sensitive nature such as biometric data.

Much more than just store dummies, mannequins contribute to the brick-and-mortar shopping experience, exuding appeal to entice consumers to visit stores, posing provocatively to capture consumer attention, and sized and detailed to motivate consumers to make purchases. Mannequins serve as a store ambassador, evangelizing brand image and selling clothes.

### Critical Thinking Questions

1. Have you noticed the new mannequins in stores where you shop for clothes? What is your reaction?
2. The new types of mannequins have centered more on women than men. Would men be more likely to buy clothes displayed on mannequins related to their size?
3. Digital mannequins collect data from passersby who are unaware that they are being recorded. Is this ethical?

External retail factors such as the architecture, arrangement, and assortment of retailers are an important influence on consumer shopping experiences. In addition, store interiors are often designed to create specific feelings in shoppers that can have an important cueing or reinforcing effect on purchase. All physical aspects of the store, including lighting,



#### ILLUSTRATION 13-2

Retail store interiors should provide a physical environment consistent with the nature of the target market, the product line, and the desired image of the outlet.

layout, presentation of merchandise, fixtures, floor coverings, colors, sounds, odors, and dress and behavior of sales personnel, combine to produce these feelings, which in turn influence purchase tendencies.<sup>13</sup> A retail clothing store specializing in extremely stylish, modern clothing would want its fixtures, furnishings, and colors to reflect an overall mood of style, flair, and newness (see Illustration 13–2). In addition, the store personnel should carry this theme in terms of their own appearance and apparel. Compare this with the interior of a so-called discount retailer, also shown in the illustration. It is important to note that one is not superior to the other. Each attempts to create an appropriate atmosphere for its target audience.

*The sum of all the physical features of a retail environment* is referred to as the **store atmosphere** or environment (see Chapter 17). Store atmosphere influences consumer judgments of store quality and image. It also has been shown to influence shoppers' moods and their willingness to visit and linger. **Atmospherics** is *the process managers use to manipulate the physical retail environment to create specific mood responses in shoppers*.<sup>14</sup> Atmospherics is also important online and is receiving increasing attention from marketers.<sup>15</sup>

Atmosphere is referred to as **servicescape** when describing a service business such as a hospital, bank, or restaurant.<sup>16</sup> Figure 13–2 classifies services according to the reason the customer is using the service and the length of time the service will be used. The consumption purpose is categorized along a continuum from strictly utilitarian, such as dry cleaning, to completely hedonic, such as a massage. The time can range from a few minutes to days or weeks. Physical characteristics and the feelings and image they create become increasingly important as hedonic motives and the time involved with the service increase. Thus, the physical characteristics of a vacation resort may be as important as or more important than the intangible services provided.

It is important that Figure 13–2 be interpreted correctly. It indicates that the physical environment at Starbucks is more important to the service experience than the physical features of dry cleaners are. *This does not mean that the physical aspects of dry cleaners are not important.* Indeed, an organized, professional-appearing dry cleaning establishment is likely to produce more satisfied customers than one with the opposite characteristics. What the figure does indicate is that the relative importance of



FIGURE

13-2

## Typology of Service Environments

Time Spent in Facility	Consumption Purpose		
	<i>Utilitarian</i>		<i>Hedonic</i>
Short [minutes]	Dry cleaner Bank	Fast food Hair salon	Facial Coffee at Starbucks
Moderate [hour(s)]	Medical appointment Legal consultation	Business dinner Exercise class	Theater Sporting event
Extended [day(s)]	Hospital Trade show	Conference hotel Training center	Cruise Resort

tangible physical features increases as one moves to extended, hedonic consumption experiences.

Having established the importance of the physical environment, we will now examine some of its components.

**Colors** As we saw in Chapter 8, certain colors and color characteristics create feelings of excitement and arousal that are related to attention. Bright colors are more arousing than dull colors. And *warm* colors, such as reds and yellows, are more arousing than *cool* colors, such as blues and greys.<sup>17</sup> Which color would be best for store interiors? The answer is, it depends. For the dominant interior color, cool colors (e.g., blue) should probably be used because they increase sales and customer satisfaction.<sup>18</sup> However, the attention-getting nature of warm colors should not be overlooked and can be used effectively as an accent color in areas where the retailer wants to attract attention and drive impulse purchases.<sup>19</sup> Cool colors also appear to be capable of reducing wait time perceptions by inducing feelings of relaxation.<sup>20</sup>

As we saw in Chapter 2, the meaning of colors varies across cultures. Therefore, this and all other aspects of the physical environment should be designed specifically for the cultures involved.

**Aromas** There is increasing evidence that odors can affect consumer shopping.<sup>21</sup> One study found that a scented environment produced a greater intent to revisit the store, higher purchase intention for some items, and a reduced sense of time spent shopping.<sup>22</sup> Another study found that one aroma, but not another, increased slot machine usage in a Las Vegas casino.<sup>23</sup> A third study found that the presence of a certain aroma in a retail setting increased pleasure, arousal, time spent, and money spent at the retailer.<sup>24</sup> A fourth study found that a pleasantly scented environment enhanced brand recall and evaluations, particularly for unfamiliar brands. The pleasant scent increased the time spent evaluating the brands (attention), which, in turn, increased memory.<sup>25</sup>

Given these results, it is not surprising that a billion-dollar *environmental fragancing* industry has developed around the use of ambient scents.<sup>26</sup> However, marketers still have a lot to learn about if, when, and how scents can be used effectively in a retail environment.<sup>27</sup> In addition, scent preferences are highly individualized; a pleasant scent to one

The Impact of Background Music on Restaurant Patrons

TABLE 13-1

Variables	Slow Music	Fast Music
Service time	29 min	27 min
Customer time at table	56 min	45 min
Customer groups leaving before seated	10.5%	12.0%
Amount of food purchased	\$55.81	\$55.12
Amount of bar purchases	\$30.47	\$21.62
Estimated gross margin	\$55.82	\$48.62

Source: R. E. Milliman, "The Influence of Background Music on the Behavior of Restaurant Patrons," in the *Journal of Consumer Research*, September 1986, p. 289. Copyright © 1986 by the University of Chicago. Used by permission.

individual may be repulsive to another. Moreover, some shoppers object to anything being deliberately added to the air they breathe, and others worry about allergic reactions.<sup>28</sup>

**Music** Music influences consumers' moods, which influence a variety of consumption behaviors both in traditional retailer settings and in online settings.<sup>29</sup> Is slow-tempo or fast-tempo background music better for a restaurant? Table 13-1 indicates that slow music increased gross margin for one restaurant by almost 15 percent per customer group compared with fast music. However, before concluding that all restaurants should play slow music, examine the table carefully. Slow music appears to have relaxed and slowed down the customers, resulting in more time in the restaurant and substantially more purchases from the bar. Restaurants that rely on rapid customer turnover might be better off with fast-tempo music.

Other aspects of music besides tempo are also important. For example, research suggests that matching music to the musical preferences of the target audience is critical to positive retail outcomes such as satisfaction and enjoyment, browsing time, spending, perceived service quality, and positive word-of-mouth. In addition, research suggests that music that creates moderate levels of arousal (versus extremely low or high) yields the most positive retail outcomes.<sup>30</sup>

Because of the impact that music can have on shopping behavior, firms exist to develop music programs to meet the unique needs of specific retailers. An emerging trend is having music more in the foreground so it becomes part of the shopping experience and drives store image. AEI, a major supplier of foreground music, does intense research on the demographics and psychographics of each client store's customers. The age mix, buying patterns, and traffic flows of each part of the day are analyzed. AEI characterizes its approach as

[creating] environments where sounds, video, lighting and architecture blend together to give a brand a voice, creating emotional attachments that encourage consumers to shop longer, increase spending and return often.<sup>31</sup>

Firms such as Abercrombie & Fitch, Banana Republic, Bath & Body Works, and Eddie Bauer use companies like AEI to create appropriate and consistent shopping environments throughout their chains.

**Crowding** Crowding generally produces negative outcomes for both the retail outlet and the consumer.<sup>32</sup> As more people enter a store or as more of the space of the store is

filled with merchandise, an increasing percentage of the shoppers will experience a feeling of being crowded, confined, or claustrophobic. Most consumers find these feelings to be unpleasant and will take steps to change them. The primary means of doing so is to spend less time in the store by buying less, making faster decisions, and using less of the available information. This in turn tends to produce less satisfactory purchases, an unpleasant shopping trip, and a reduced likelihood of returning to the store.

Marketers should design their outlets in ways that will help reduce consumers' perceptions of crowding. This is difficult because retail shopping tends to occur at specific times, such as holiday weekends. Retailers must balance the expense of having a larger store than required most of the time against the cost of having dissatisfied customers during key shopping periods. Using extra personnel, opening additional checkout lines, and implementing similar measures can enhance the flow of consumers through a store during peak periods and reduce the crowding sensation. In addition, recent research shows that music tempo can be important. Specifically, music with a slow tempo offsets the negative emotions experienced as a result of crowding. Because music tempo adjustments are less expensive than store expansion or new personnel, this is an important finding for retail strategy.<sup>33</sup>

Marketers need to be sensitive to cross-cultural differences because personal space and resulting crowding perceptions can vary from culture to culture. For example, one study found that when the activity is for fun, such as an amusement park or concert, Middle East consumers perceive less crowding and appreciate crowding more than North American consumers.<sup>34</sup>

## Social Surroundings

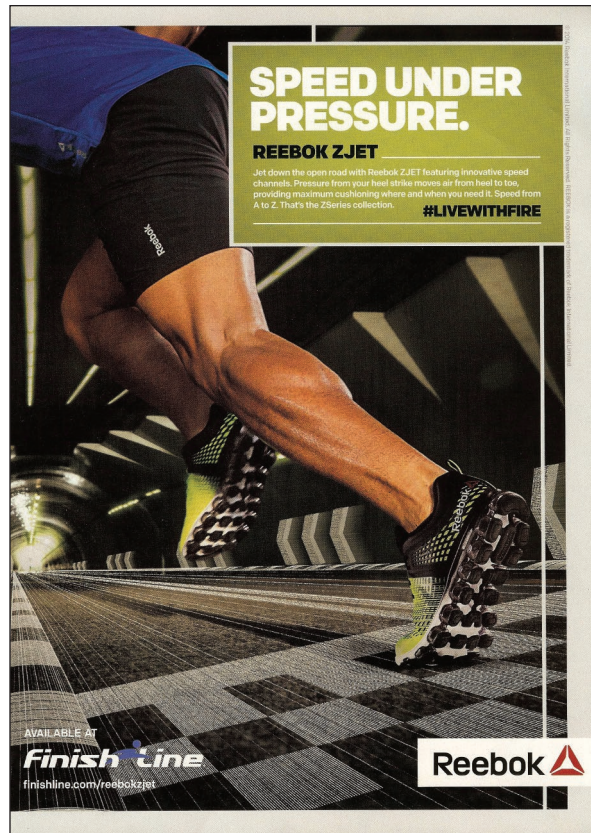
**Social surroundings** are *the other individuals present in the particular situation*. People's actions are frequently influenced by those around them. What would you wear in each of the following situations?

- Studying alone for a final.
- Meeting at the library with a date to study for a final.
- Going to a nice restaurant with a date.
- Meeting a prospective employer for lunch.

Illustration 13–3 shows a company that is positioning its brand for casual rather than formal social settings.

Social influence is a significant force acting on our behavior because individuals tend to comply with group expectations, particularly when the behavior is visible (see Chapter 7). Thus, shopping, a highly visible activity, and the use of many publicly consumed brands are subject to social influences.<sup>35</sup> This is particularly true of those who are highly susceptible to interpersonal influence, a stable personality trait. As just one example, a recent study finds that consumers are more likely to engage in variety-seeking behavior in public (versus private) consumption situations even if it means consuming products they like less. The reason is that consumers feel that others view them more positively (more fun, interesting, exciting) if their purchases show more variety. This tendency is stronger for those more susceptible to interpersonal influence.<sup>36</sup>

Marketers have recently begun to examine the role of social influence on embarrassment. **Embarrassment** is *a negative emotion influenced by both the product and the situation*. Certain products are more embarrassing than others (condoms, hearing aids, etc.) and embarrassment is driven by the presence of others in the purchase or usage situation. Because embarrassment can deter purchases, this is an important area for marketers. One



## ILLUSTRATION 13-3

Styles vary depending on the social situation in which they will be worn.

finding is that familiarity with purchasing the product reduces embarrassment, so marketers might try advertisements that show the purchase of a potentially embarrassing product in which no awkwardness or embarrassment occurs. For extremely sensitive products (e.g., adult diapers), strategies might include home delivery options with discreet labeling to completely avoid the social component.<sup>37</sup>

Shopping can provide a social experience outside the home for making new acquaintances, meeting existing friends, or just being near other people. Some people seek status and authority in shopping because the salesperson's job is to wait on the customer. This allows these individuals a measure of respect or prestige that may otherwise be lacking in their lives. Thus, consumers, on occasion, shop *for* social situations rather than, or in addition to, products. The presence of others *during* the shopping trip can also influence impulse buying. Results show that compared with shopping alone, shopping with close friends increased impulse buying, while shopping with close family members decreased impulse buying. It seems that consumers believe that norms differ such that their friends view impulse buying as more acceptable than family.<sup>38</sup>

Frequently, marketing managers will not have any control over social characteristics of a situation. For example, when a television advertisement is sent into the home, the advertising manager cannot control whom the viewer is with at the time of reception. However, the manager can use the knowledge that some programs are generally viewed alone (week-day, daytime programs), some are viewed by the entire family (prime-time family comedies), and others are viewed by groups of friends (Super Bowl). The message presented can be structured to these viewing situations. Marketers can also use social consumption



**ILLUSTRATION 13-4**

In the United States and other countries, dual-career and single-parent families have caused consumers to feel time starved. Internet shopping provides many such consumers both time savings and control over when they shop. This Zappos ad would appeal to this consumer.



themes in their ads to enhance the likelihood that consumers will consider the social component in their decisions. For example, a recent study found that brand personality (fun and sophistication) conveyed by a celebrity endorser in an ad only enhanced purchase intentions when a social context was evoked.<sup>39</sup>

## Temporal Perspectives

**Temporal perspectives** are *situational characteristics that deal with the effect of time on consumer behavior*. Time as a situational factor can manifest itself in a number of ways.<sup>40</sup> The amount of time available for the purchase has a substantial impact on the consumer decision process. In general, the less time there is available (i.e., increased time pressure), the shorter will be the information search, the less available information

will be used, and the more suboptimal purchases will be made.<sup>41</sup> In addition, research suggests that time pressure decreases perceptions of retailer service quality.<sup>42</sup>

Limited purchase time can also result in a smaller number of product alternatives being considered. The increased time pressure experienced by many dual-career couples and single parents tends to increase the incidence of brand loyalty, particularly for nationally branded products. The obvious implication is that these consumers feel safer with nationally branded or “known” products, particularly when they do not have the time to engage in extensive comparison shopping.

Time as a situational influence affects consumers’ choice of stores and behaviors in those stores.<sup>43</sup> A number of retail firms have taken advantage of the temporal perspective factor. Perhaps the most successful of these is the 7-Eleven chain, which caters almost exclusively to individuals who either are in a hurry or want to make a purchase after regular shopping hours.

Internet shopping is growing rapidly in part as a result of the time pressures felt by many dual-career and single-parent households. Shopping on the Internet has two important time-related dimensions. First, it has the potential to reduce the amount of time required to make a specific purchase. Second, it provides the consumer with almost total control over *when* the purchase is made (see Chapter 17). These features are among the major reasons for the rapid growth in Internet outlets and sales (see the Zappos ad in Illustration 13–4).

## Task Definition

**Task definition** is *the reason the consumption activity is occurring*. The major task dichotomy used by marketers is between purchases for self-use versus gift giving.

**Gift Giving** Consumers use different shopping strategies and purchase criteria when shopping for gifts versus shopping for the same item for self-use.<sup>44</sup> Consumers give gifts for many reasons. Social expectations and ritualized consumption situations such as birthdays often require gift giving independent of the giver’s actual desires.<sup>45</sup> Gifts are also



given to elicit return favors in the form of either gifts or actions. And, of course, gifts are given as an expression of love and caring.<sup>46</sup>

The type of gift given and desired varies by occasion and gender.<sup>47</sup> One study found that wedding gifts tend to be *utilitarian*, while birthday gifts tend to be *fun*. Thus, both the general task definition (gift giving) and the specific task definition (gift-giving occasion) influence purchase behavior, as does the relationship between the giver and the recipient.

Gift giving produces anxieties on the part of both givers and receivers.<sup>48</sup> Gifts communicate symbolic meaning on several levels. The gift item itself generally has a known, or knowable, price that can be interpreted as a measure of the esteem the giver has for the receiver. The image and functionality of the gift implies the giver's impression of the image and personality of the receiver. It also reflects on the image and thoughtfulness of the giver.

The nature of a gift can signify the type of relationship the giver has or desires with the receiver.<sup>49</sup> A gift of stationery implies a very different desired relationship between two individuals than does a gift of cologne. Consider the following:

The biggest moment of revelation, the moment I knew he was “serious” about me, was when he showed up with a gift for my daughter. Other men had shown the typical false affection for her in order to get on my good side, but he was only civil and polite to her, never gushy. One day, however, he showed up with a very nice skateboard for my daughter. . . . The gift marked a turning point in our relationship. I think for him it marked the time that he decided it would be OK to get serious about a woman with a child.<sup>50</sup>

As the example above indicates, the act of giving/receiving a gift can alter the relationship between the giver and the receiver. In addition, items received as gifts often take on meaning associated with the relationship or the giver. For example, a gift may be cherished and protected because it symbolizes an important friendship.<sup>51</sup>

Of course, gift giving is culture specific (see Chapter 2).<sup>52</sup> For example, in characterizing gift giving in Korea (collectivist) compared with the United States (individualistic), one expert summarized:

Koreans reported more gift giving occasions, a wider exchange network, more frequent giving of practical gift items, especially cash gifts, strong face-saving and group conformity motivations, more social pressure to reciprocate, higher gift budget, and frequent workplace giving.<sup>53</sup>

## Antecedent States

*Features of the individual person that are not lasting characteristics*, such as momentary moods or conditions, are called **antecedent states**. For example, most people experience states of depression or excitement from time to time that are not normally part of their individual makeup.

**Moods** **Moods** are *transient feeling states that are generally not tied to a specific event or object*.<sup>54</sup> They tend to be less intense than emotions and may operate without the individual's awareness. Although moods may affect all aspects of a person's behavior, they generally do not completely interrupt ongoing behavior as an emotion might. Individuals use such terms as *happy, cheerful, peaceful, sad, blue, and depressed* to describe their moods.

Moods both affect and are affected by the consumption process.<sup>55</sup> Moods influence decision processes, the purchase and consumption of various products, and perceptions of service.<sup>56</sup> Positive moods appear to be associated with increased browsing and impulse purchasing. Negative moods also increase impulse and compulsive purchasing in some consumers. One explanation is that some shopping behaviors play both a mood

**ILLUSTRATION 13-5**

Consumers' moods vary over the course of time. Astute firms develop products and services relevant to the various moods consumers experience or want to experience.



maintenance (positive moods) and mood enhancement (negative moods) role.<sup>57</sup>

Mood can also play an important role in the communications situation. Such effects are often called *program context effects* and relate to the nature of the programming surrounding the focal ad (see Chapter 8). The television, radio, and magazine content viewed just prior to the focal ad can influence consumers' moods and arousal levels, which, in turn, influence their information-processing activities.<sup>58</sup> A basic finding is that ad and brand attitudes are often influenced in a mood-congruent manner. Thus, a TV show that puts a consumer in a positive mood (elicits positive affective reactions)

should improve ad and brand attitudes compared with one that puts the consumer in a negative mood. However, in cases where so-called negative programming is also liked by the viewer (a sad movie that a viewer loves), then program liking can still provide a positive boost in ad and brand attitudes.<sup>59</sup> Given such complexities, marketers must pretest their ads in contexts as close to their expected programming environment as possible.

Consumers actively manage their mood states (see Illustration 13–5).<sup>60</sup> That is, consumers often seek situations, activities, or objects that will alleviate negative moods or enhance positive ones. Products and services are one means consumers use to manage their mood states. Thus, a person feeling bored, sad, or down might view a situation comedy on television, go to a cheerful movie, visit a fun store, eat at an upbeat restaurant, or purchase a new Blu-ray disc, shirt, or other fun product.<sup>61</sup> Consumers may engage in such mood-regulating behavior both at a nonconscious level and also at a deliberate, conscious level:

[T]here are certain products that I purchase specifically to make me feel better. For instance, occasionally, I enjoy smoking a cigar. Certainly the cigar serves no other purpose than to make me feel good.

While other cosmetics, perfumes and nice clothes can make me feel good, they seldom have the same power to transform my temperament like a manicure and pedicure can.<sup>62</sup>

Marketers attempt to influence moods and to time marketing activities with positive mood-inducing events.<sup>63</sup> Many companies prefer to advertise during light television programs because viewers tend to be in a good mood while watching these shows. Restaurants, bars, shopping malls, and many other retail outlets are designed to induce positive moods in patrons. As discussed earlier, music is often played for this reason. Finally, marketers can position their products and services in terms of mood enhancement.

**Momentary Conditions** Whereas moods reflect states of mind, *momentary conditions reflect temporary states of being*, such as being tired, being ill, having extra money, being broke, and so forth. However, for conditions, as for moods, to fit under the definition of antecedent states, they must be momentary and not constantly with the individual. Hence, an individual who is short of cash only momentarily will act differently from someone who is always short of cash.<sup>64</sup>

As with moods, individuals attempt to manage their momentary conditions, often through the purchase or consumption of products and services. For example, individuals feeling tired or sleepy during the day may drink a cup of coffee or a soft drink or eat a candy bar. Massages are consumed to relieve sore muscles. A variety of medications are sold to relieve

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Also available  
for your feet.

ILLUSTRATION 13-6

This product is designed to help consumers cope with an uncomfortable momentary condition.

physical discomfort associated with overexertion, colds, allergies, and so forth. Pawnshops provide cash for individuals temporarily needing funds, as do banks and other financial institutions. Thus, a great deal of marketing activity is directed toward momentary conditions. Illustration 13–6 is an ad for a product designed to relieve a momentary condition.

## RITUAL SITUATIONS

Rituals are receiving increasing attention by marketing scholars and practitioners. A **ritual situation** can be described as *a socially defined occasion that triggers a set of interrelated behaviors that occur in a structured format and that have symbolic meaning*.<sup>65</sup> Ritual situations can range from completely private to completely public. A completely private ritual situation would be an individual's decision to drink a private toast or say a private prayer on the anniversary of an event with special meaning to the individual. A couple who celebrates their first date by returning to the same restaurant every year is involved in a more public ritual. Weddings tend to be even more public. Finally, national and global holidays present very public ritual situations.

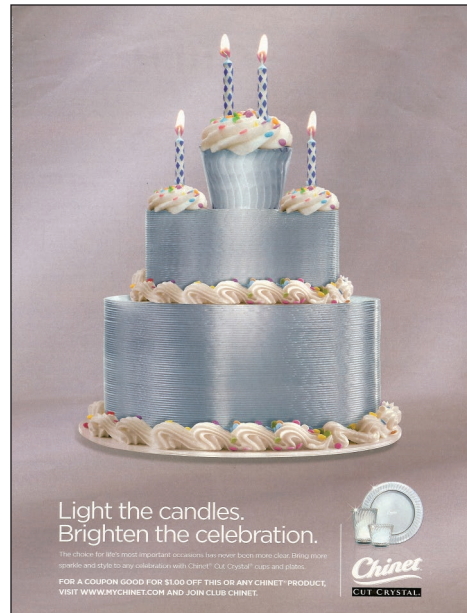
Ritual situations are of major importance to marketers because they often involve prescribed consumption behaviors. Every major American holiday (ritual situation) has consumption rituals associated with it. For example, more than 60 percent of the toy industry's sales occur at Christmas.

L04



**ILLUSTRATION 13-7**

Ritual situations generally have consumption patterns associated with them. This brand is tapping into ritual situations.



While there is significant variation across individuals and households, there is enough shared behavior that marketers can develop products and promotions around the common ritual situations that arise each year. For example, candy marketers produce and promote a wide array of candies for Valentine's Day and Halloween. Illustration 13-7 shows how one marketer is capitalizing on consumption rituals.

Marketers also attempt to change or create consumption patterns associated with ritual situations.<sup>66</sup> Mother's Day is a \$10 billion occasion in which card giving is largely a ritual behavior created by marketers.<sup>67</sup> Halloween cards are now being promoted as part of the Halloween ritual.<sup>68</sup> And many firms seek to make their products and services part of the consumption pattern associated with "coming of age." These occasions are often marked

with religious ceremonies and after-ceremony parties. Traditionally, these events have tended to focus on religious aspects and responsibility to family and community. For example:

In Latin America, the quinceañera, a celebration dating back to the Aztecs that commemorates the spiritual and physical coming of age of a 15-year-old girl, is typically observed with a ceremony in the Catholic church and a backyard party for family members.<sup>69</sup>

The "after-ceremony" celebrations range from simple and inexpensive to elaborate and costly. However, the trend is definitely toward more elaborate and costly parties with modern themes, expensive catering and entertainment, and interactive activities to entertain hundreds of guests. For example:

One Hispanic family spent \$30,000 to celebrate their daughter's quinceañera with "a horsedrawn, pumpkin-shaped crystal carriage with liveried servants in powdered wigs, a silver tulle gown and a gala at which 260 guests danced until dawn in the shadow of Sleeping Beauty's castle at Disneyland."<sup>70</sup>

Ritual situations can also result in injurious consumption. Binge or excessive drinking is a serious health and social problem on many college campuses, though its incidence appears to be on the decline. Recent research suggests that this can be understood as a ritual behavior in that it is triggered by social occasions (e.g., birthdays), involves a set of interrelated behaviors and routines (e.g., start drinking on game days at a specific time), and results in special meaning and rewards for participants (e.g., fun, acceptance by group). When approached from this perspective, more effective strategies for minimizing such behaviors may result.

## SITUATIONAL INFLUENCES AND MARKETING STRATEGY

**L05**

In the previous sections, we described a variety of marketing strategies based on situational influences. Here we will focus more specifically on the process by which such strategies can be developed.

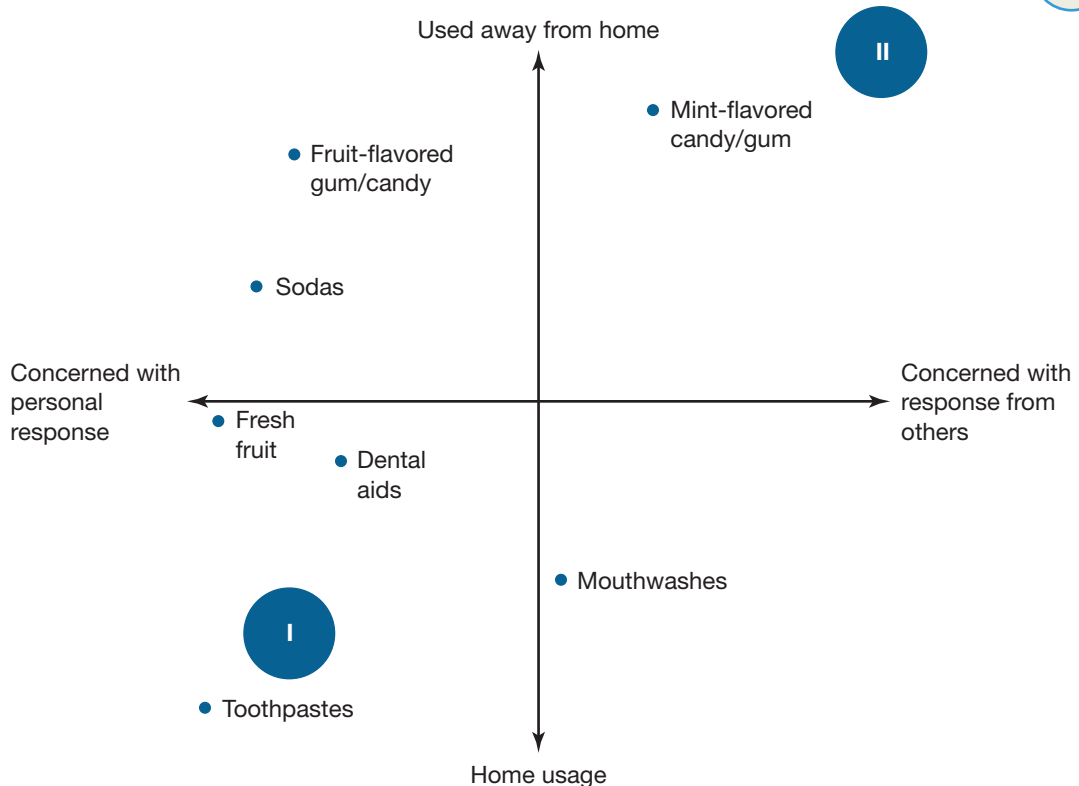
It is important to note that individuals do not encounter situations randomly. Instead, most people “create” many of the situations they face. Thus, individuals who choose to engage in physically demanding sports such as jogging, tennis, or racquetball are indirectly choosing to expose themselves to the situation of “being tired” or “being thirsty.” This allows marketers to develop products, advertising, and segmentation strategies based on the situations that individuals selecting various lifestyles are likely to encounter.

After identifying the different situations that might involve the consumption of a product, marketers must determine which products or brands are most likely to be purchased or consumed across those situations. One method of approaching this is to jointly scale situations and products. An example is shown in Figure 13–3. Here, *use situations* that ranged from “private consumption at home” to “consumption away from home where there is a concern for other people’s reaction to you” were scaled in terms of their similarity and relationship to products appropriate for that situation.

For use situation I, “to clean my mouth upon rising in the morning,” toothpaste and mouthwash are viewed as most appropriate (see Figure 13–3). However, use situation II, “before an important business meeting late in the afternoon,” involves both consumption away from home and a concern for the response from others. As a result, mint-flavored gums or candies are preferred. *Where do you think a product like Listerine Breath Strips would be located on this map?*

Use Situations and Product Positioning

FIGURE 13-3



I = Use situation: “To clean my mouth upon rising in the morning.”

II = Use situation: “Before an important business meeting late in the afternoon.”



## ILLUSTRATION 13-8

This ad shows new use situations for Arla LactoFree milk.



Determining how products are *currently used* across situations can help the marketer develop appropriate advertising and positioning strategies. In our example, Wrigley's might advertise its Spearmint Gum as having breath-freshening capabilities that make it appropriate for use in social situations away from home. Or a marketer may try to change the situations for which a product is used. In Figure 13-3, mouthwash is not seen as appropriate for consumption away from home. What if a version of Scope was developed that one swallowed after use? Could it successfully be promoted for use away from home? Would it be able to compete against breath strips? Illustration 13-8 promotes a new usage situation for Arla LactoFree milk in its "Say Yes to Frothy Fruity Smoothies" campaign.

Another approach for developing situation-based marketing strategies is to follow these five steps:<sup>71</sup>

1. Use observational studies, focus group discussions, depth interviews, and secondary data to discover the various usage situations that influence the consumption of the product.
2. Survey a larger sample of consumers to better understand and quantify how the product is used and the benefits sought in the usage situation by the market segment.
3. Construct a person-situation segmentation matrix. The rows are the major usage situations and the columns are groups of users with unique needs or desires. Each cell contains the key benefits sought. (Table 13-2 illustrates such a matrix for suntan lotion.) Then:
4. Evaluate each cell in terms of potential (sales volume, price level, cost to serve, competitor strength, and so forth).
5. Develop and implement a marketing strategy for those cells that offer sufficient profit potential given your capabilities.

Person–Situation Segments for Suntan Lotions

TABLE 13-2

Suntan Lotion Use Situation	Potential Users of Suntan Lotion				General Situation Benefits
	Young Children	Teenagers	Adult Women	Adult Men	
Beach/boat activities	Prevent sunburn/skin damage	Prevent sunburn while tanning	Prevent sunburn/skin change/dry skin	Prevent sunburn	Container floats
Home/pools sunbathing	Prevent sunburn/skin damage	Tanning without sunburn	Tanning without skin damage or dry skin	Tanning without sunburn/skin damage	Lotion won't stain clothes or furniture
Tanning booth		Tanning	Tanning with moisturizer	Tanning	Designed for sunlamps
Snow skiing		Prevent sunburn	Prevent sunburn/skin damage/dry skin	Prevent sunburn	Antifreeze formula
Person benefits	Protection	Tanning	Protection and tanning with soft skin	Protection and tanning	

Source: Adapted from P. Dickson, "Person–Situation: Segmentation's Missing Link," *Journal of Marketing*, Fall 1982, pp. 56–64. Published by the American Marketing Association. Reprinted with permission.

## SUMMARY

### LO1: Define *situational influence*

*Situational influence* is all those factors particular to a time and place that do not follow from a knowledge of the stable attributes of the consumer and the stimulus and that have an effect on current behavior.

### LO2: Explain the four types of situations and their relevance to marketing strategy

Four categories of situations are communications, purchase, usage, and disposition situations. The situation in which consumers receive information is the communications situation. The situation in which a purchase is made is the purchase situation. The situation in which the product or service is used is the usage situation. The situation in which a product or product package is disposed of either after or before product use is the disposition situation. Each type of situation has marketing implications such as within what programming to advertise (communications situation), the effect of other people on an individual's shopping behavior in-store (buying situation), the ability to expand beyond traditional

uses for a given product (usage situation), and the factors contributing to recycling behavior (disposition situation).

### LO3: Summarize the five characteristics of situations and their influence on consumption

Five characteristics of situations have been identified. *Physical surroundings* include geographical and institutional location, decor, sound, aromas, lighting, weather, and displays of merchandise or other material surrounding the product. Retailers are particularly concerned with the effects of physical surroundings. The sum of all the physical features of a retail environment is referred to as the *store atmosphere* or environment. *Atmospherics* is the process managers use to manipulate the physical retail environment to create specific mood responses in shoppers. Atmosphere is referred to as *servicescape* when describing a service business such as a hospital, bank, or restaurant.

*Social surroundings* deal with other persons present who could have an impact on the individual consumer's behavior. The characteristics of the other persons

present, their roles, and their interpersonal interactions are potentially important social situational influences.

*Temporal perspectives* relate to the effect of time on consumer behavior, such as effects of time of day, time since last purchase, time since or until meals or payday, and time constraints imposed by commitments. Convenience stores have evolved and been successful by taking advantage of the temporal perspective factor.

*Task definition* reflects the purpose or reason for engaging in the consumption behavior. The task may reflect different buyer and user roles anticipated by the individual. For example, a person shopping for dishes to be given as a wedding present is in a different situation from a person buying dishes for personal use.

*Antecedent states* are features of the individual person that are not lasting or relatively enduring characteristics. *Moods* are temporary states of depression or high excitement, and so on, which all people experience. *Momentary conditions* are such things as being tired, being ill, having a great deal of money (or none at all), and so forth.

#### LO4: Discuss ritual situations and their importance to consumers and marketers

A *ritual situation* can be described as a set of inter-related behaviors that occur in a structured format, that have symbolic meaning to consumers, and that occur in response to socially defined occasions. Ritual situations can range from completely private to completely public. They are of major importance to marketers because they often involve prescribed consumption behaviors.

#### LO5: Describe the use of situational influence in developing marketing strategy

Situational influences may have direct influences, but they also interact with product and individual characteristics to influence behavior. In some cases, the situation will have no influence whatsoever because the individual's characteristics or choices are so intense that they override everything else. But the situation is always potentially important and therefore of concern to marketing managers.

### KEY TERMS

Antecedent states 483	Physical surroundings 475	Store atmosphere 477
Atmospherics 477	Purchase situations 474	Task definition 482
Communications situation 472	Ritual situation 485	Temporal perspectives 482
Disposition situation 475	Servicescape 477	Usage situations 474
Embarrassment 480	Situational influence 472	
Moods 483	Social surroundings 480	

### REVIEW QUESTIONS

1. What is meant by the term *situation*? Why is it important for a marketing manager to understand situational influences on purchasing behavior?
2. What are *physical surroundings* (as a situational variable)? Give an example of how they can influence the consumption process.
3. How does crowding affect shopping behavior?
4. What is *store atmosphere*?
5. What is *atmospherics*?
6. What is a *servicescape*?
7. What are *social surroundings* (as a situational variable)? Give an example of how they can influence the consumption process.
8. What is *temporal perspective* (as a situational variable)? Give an example of how it can influence the consumption process.
9. What is *task definition* (as a situational variable)? Give an example of how it can influence the consumption process.
10. Why do people give gifts?