

Petrol heads

A study of petrol brands shows that consumers do not always choose the brand they say they prefer. Measuring unconscious preference is key to ensuring brand choice.

By Chiara Succi and Annett Pecher,
Emotional Logic

Brands are on a constant quest to unlock consumers' minds and find the inner drivers that influence their behaviour. Talking to consumers is a good starting point but everyone knows that traditional research techniques such as surveys and focus groups can only offer a partial view of actual behaviour as they can only capture what the consumers will openly – and rationally – say, ignoring the real motivations underlying their brand choices.

The problem lies in the fact that most brands only focus on the conscious mind and ask consumers directly about their preference. If they rely on that they risk targeting the wrong consumers because conscious preference on its own cannot accurately predict brand usage. For example, if we ask consumers to state their preferred petrol brand, and then cross-reference this with the brand they use most often, we find that conscious preference alone can only identify as little as 29% of frequent users of a brand.

The reason why consumers who have a conscious preference for a brand do not buy it more often is that unconscious preference exists and this also influences brand choice.

In the case of petrol brands, for instance, on the surface, consumers mention factors such as price, location, convenience and loyalty cards. These may be perfectly valid reasons to motivate conscious preference for one brand over another, but they do not automatically translate into frequent purchase or usage. However, if we dig deeper we find unconscious preference: this is a positive or negative feeling for – or against – a brand, which is based on emotional drivers.

Consumers may or may not be aware of having those feelings or may be unable or unwilling to verbalise them. So we have some

consumers who have an unconscious and conscious preference for the same brand, but there are also consumers who have a stated, conscious preference for one brand whilst showing an unconscious preference for another.

This is also what influences portfolio purchases – one brand fulfils the conscious requirements whilst another fulfils emotional needs – leading to alternating purchase of both brands (the brand with the unconscious preference usually being purchased slightly more frequently than the one with the conscious preference).

So what drives unconscious preference? In the case of petrol stations, consumers overall seek a sense of relief and reassurance, which applies to all brands in the product category indistinctly. Emotionally speaking, this is the base level that any petrol station brand has to satisfy in order to successfully attract customers.

However, in addition to emotional drivers important for the entire category, we also found that specific emotional drivers are associated with certain brands. We have looked at two leading (non-supermarket) petrol brands – let's call them brand A and brand B – and found significant differences in emotional attachment.

When it comes to brand A, for example, consumers have excitement as their strongest driver, which is a mixture of the elation and sense of danger they experience at the start of a journey; whereas brand B evokes freedom and independence, which are associated with the privacy of one's car and the freedom to travel to any chosen destination. Those emotions are strong drivers and contribute to the unconscious preference consumers have for or against the brands. Knowing how this dynamic works will enable those brands to stimulate those feelings during the consumer experience and thereby generate more unconscious attachment to the brand.

If brands want to accurately predict who

will buy their products, they need to measure conscious and unconscious preference. Our Brand ELIOT Test (Figure 1) combines both measures to precisely identify the consumers who have an aligned preference for a brand (conscious and unconscious); in the case of petrol stations, the combination of these measures was able to explain 80% to 100% usage of a particular brand. This means that measuring unconscious preference enables a brand to identify its most loyal consumers and discover their deeply held emotional associations with the brand.

FIGURE 1
Test scores for leading Petrol Station brand A

Conscious preference	
Proportion of customers who have a conscious preference for this brand	43%
Likelihood those consumers use this brand most often	29%
Unconscious preference	
Proportion of customers who have an unconscious preference for this brand	15%
Likelihood those consumers use this brand most often	67%
ELIOT Score (aligned preference)	
Proportion of customers who are preference aligned* ELIOT Score	13%
Likelihood those consumers use this brand most often	80%

(* Aligned preference means that the participant showed a neutral or positive conscious preference combined with a positive unconscious preference for the same brand)



HOW DOES AN ELIOT TEST WORK?

During the first part of an ELIOT test, conscious preference is measured by asking consumers a number of standard brand choice questions. The ELIOT then measures unconscious preference through reaction speeds in a word-sorting exercise with different brands. This works very much in line with social psychology principles where biases and predisposition is concerned.

For example, if we show consumers the colour green and then show them the word 'apple', they are faster in recognising the word than if we had not shown them the green colour first. This is because most people have an unconscious association of the colour green with apples. We use the same principle to measure brand preference. If consumers hold an unconscious bias for a brand they will be quicker (by fractions of milliseconds) recognising 'good' words than if they have a bias against it.

Having an unconscious bias for a brand does not mean automatic purchasing – though it appears from our research that unconscious preference is more likely than conscious preference to lead to frequent purchasing. In our petrol station example, only 29% of people who have a conscious preference for Brand A use it most often,

whilst 67% of consumers who have an unconscious preference for the brand use it most frequently.

The most interesting result is when we overlay conscious and unconscious preference – people who are aligned (i.e. have a positive conscious and unconscious preference for the same brand) are 80% likely to buy it most often. For a second brand we tested, this even went up to 100%.

This indicates that in order to purchase a brand, most often, consumers have to hold an unconscious preference (positive bias) for the brand and also be consciously clear that it is the best choice for them (mostly based on rational reasons). It seems, therefore, that consumers are most likely to buy a brand when it both feels good and makes sense.

Measuring unconscious preference is critical. By measuring both conscious and unconscious preference, brands benefit in the following ways:

- It identifies which factors actually drive the unconscious emotional attachment to the brand, so that this information can be used to inform brand strategy
- It allows brands to activate conscious as well as unconscious drivers to stimulate demand
- It enables development of strategies to increase unconscious preference for a brand

to increase purchase frequency and customer loyalty

- It makes it possible to identify and leverage unconscious drivers of successful competitor brands to gain market share
- It enables the identification of unfulfilled unconscious needs that represent untapped market potential

Conscious preference on its own is a poor predictor of consumer behaviour, and if brands only focus on that, they may miss valuable market potential. For products, such as petrol, consumers show no strong conscious preference for any one brand and will switch from one to another for practical reasons. But we also have to remember that consumers can have an unconscious preference for a brand and attach unique emotional triggers to it. It is critical that brands identify this, as it is the combination of conscious and unconscious preference that determines brand choice.

Measuring unconscious preference gives a brand considerable advantage over the competition, as it helps to identify the consumers who are aligned, and to adjust its positioning accordingly to increase brand usage and loyalty.

more on brand preference at www.warc.com