

Self-Congruity in the Light of the Theory, Research Methodology and Applied Research: Key Issues and Perspectives



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The aim of the article is to indicate key issues and formulate requirements for a new conceptualisation and operationalisation of self-image congruity and its role in explaining consumer behaviour. A special emphasis is put on the need to select a proper theoretical domain, advantages of applying typical brand user image as a point of reference in social comparisons and relevance of the undesirable image as a potential source of avoidance behaviour. The analysis of self-congruity methodology points to a need to identify relevant dimensions in self-image congruity, provide a broader generalisation of results and development of research procedures for psychological realism in congruity measurement.

Keywords: self-congruity, brand user image, brand image, critical review.

Introduction

Due to symbolic meaning, physical items are an important part of self-concept (Belk, 1988; James, 1890) - they may be used in its construction (Wicklund&Gollwitzer, 1982). Today, brands of products and services play a special role in this process (Belk, Bahn& Mayer, 1982;



Sprott, Czellar, & Spangenberg, 2009), because they are a subject of intentional marketing designed to build unique associations with brands in accordance with the unique selling proposition approach (Reeves, 1961). In this way, a symbolic brand image is created. It outreaches the functional importance of the product and some brands assume proportions of symbols of values and lifestyle, including the supracultural ones (Guzmán&Paswan, 2009; McCracken, 1986).

The self-congruity theory is one of the most important theory that explains how important is and what role plays convergence of consumer self-concept and brand image in consumer behavior (Sirgy, 1982, 1986). According to this theory, more congruity entails more positive consumer attitude to the brand and an increasing probability of brand purchase. This has been proven in numerous studies (see metaanalysis in Aguirre-Rodriguez, Bosnjak, & Sirgy, 2012). In spite of the undisputed importance of congruity theory there are numerous theoretical and methodological issues preventing from full use of their potential in both academic and marketing research. The aim of the article is to indicate key issues and formulate requirements for a new conceptualisation and operationalisation of congruity and its role in explaining consumer behaviour.

Theoretical issues

The first problematic issue in the congruity theory is the reference point for a consumer – is it brand image (e.g. Sirgy, Johar, Samli, & Claiborne, 1991) or typical brand user (TBU) image (e.g.. Kressmann, Sirgy, Herrmann, Huber, Huber, & Lee, 2006). When solving the problem, a pragmatic approach assessing the ability to explain consumer preferences is applied (Aguirre-Rodriguez et al., 2012), but this argument is of none theoretical nature, because this involves domain adjustment problem (Avis, 2012; Kim, 2015). The brand is inanimate and may not be used as a point of reference as in the case of man due to incompatibility of perception dimensions.

Regardless of the above mentioned reference point selection in social comparisons, a theoretical domain choice to interpret consumer behaviour remains problematic (Capelli&Jolibert, 2009). This results in, inter alia, the problem to select a model of perception. Theories of personality are selected most often (Capelli&Jolibert, 2009), but due to the fact that during social comparisons self vs. brand or self vs. typical user personal and non-personal traits are attributed to brands or typical users (instead of objective personality traits possessed by object of perception), a more appropriate domain to conceptualise these comparisons would be social psychology describing social perception and attribution processes (Gorbaniuk, 2011).

Despite the widespread belief that self-concept (e.g.. Onkvisit& Shaw, 1987), brand image (e.g.. Aaker, 1997; Gorbaniuk, Smith, & Razmus, 2009) and user image (Gorbaniuk&Dudek, 2016; Gorbaniuk, Toczyńska, Osiak, & Szostak, 2012) is multidimensional, a major problem that reduces the possibility of systematic gathering of results, focusing around a recognized comparison model of Self-TBU is the lack of knowledge about universal dimensions that take into account the specific nature of such comparisons (Lückerath, 2010). In personality psychology this role is played by Five-Factor Model (McCrae & Costa, 1987), and in social psychology – by Two-Factor Model (Abele & Wojciszke, 2007; Fiske, Cuddy, & Glick, 2007). As of today, in the case of congruity between self and brand or self and TBU, there is no such model. Some substitutes as a brand personality model are applied (Aaker, 1997), but this model, due to many critical voices (Ambroise&Valette-Florence, 2010; Austin, Sigauw, & Mattila, 2003; Avis, 2012; Avis & Aitken, 2015; Avis, Forbes, & Ferguson, 2012; Azoulay&Kapferer, 2003; Bosnjak, Bochmann, & Hufschmidt, 2007; Capelli&Jolibert, 2009; Gorbaniuk, 2011), is not suitable, not



only for consumer perception research, but also brand perception research. In turn, the use of personality models adopted from personality psychology (e.g. Huang, Mitchell, & Rosenaum-Elliott, 2012) without any verification of their validity in the consumer context may cause, taking into account irrelevant dimensions in congruity (so-called blank comparison) on the one hand and omitting dimensions absent in personality model, but to be taken into account in real comparisons with typical brand users on the other hand (Gorbaniuk & Dudek, 2016).

Another theoretical problem, beyond self-image congruity, is a multiplicity of self-images and their variability (Markus & Kunda, 1986). In self-congruity theory, actual and ideal self-image are emphasised, and taking into account a social context and social expectations – social self-image and ideal social self-image (Sirgy, 1986). The multiplicity and changeability of self-images mount enormous challenges for research, in particular the need to justify the selection of a specific image.

Moreover, the fact that undesired image of the brand and its typical user in self-image congruence research is underestimated, needs to be highlighted. Although the theory of congruity does not preclude the importance of undesirable image, its role in consumer behaviour is relatively unknown (cf. Bosnjak & Brand, 2008; Hogg & Banister, 2001). From the perspective of self-evaluation motives, scant attention is paid to the importance of self-protection motives in relation to self-enhancement and self-verification motives. This disparity is unfounded in psychological research in the non-consumer context (cf. Alicke & Sedikides, 2009; Dauenheimer, Stahlberg, Spreemann, & Sedikides, 2002; Swann, 1990).

Methodological issues

Measurement

Congruity measurement may be direct or indirect (Sirgy, Grewal, & Mangleburg et al., 1997). Direct measurement means that the respondent is asked about self-congruence with a brand image or TBU image. A disadvantage of such measurement is sensitivity to social approval, depending on perceived expectations of the social environment (represented by the researcher). However, in the case of indirect measurement, the respondent first evaluates the image of brand/TBU then evaluates self-image, and the researcher calculates the degree of discrepancy between the image of the brand/user and self-image by using one of many formulas (cf. Sirgy et al., 1997). A disadvantage of indirect measurement is that the result depends on a selected formula and index of congruity.

Despite at least four types of self-image are described in literature that are important in comparisons with brand or TBU images, as shown by meta-analysis (Aguirre-Rodriguez et al., 2012) most studies focus mainly on one self-image. This indicates the underestimation of congruity in the measurement of self-congruity effect. In turn, simultaneous measurement of several images using current measurement techniques, does not allow for the isolation of congruity with each image separately and causes at least partial measurement redundancy and overlap of self-congruity effects. In particular, the major limitation of the self-congruence measurement is almost complete ignoring the undesirable image of self, potentially responsible for avoiding brands, although – as indicated in research – the amount of negative associations with brands (Bosnjak, Bochmann, & Hufschmidt, 2007; Gorbaniuk, 2011; Gorbaniuk, Smith, & Razmus, 2009) and their typical users (Gorbaniuk, Toczyńska, Osiak, & Szostak, 2012) is very large. The measurement of anticipated undesirable changes in self-concept could explain why some brands are omitted.

Current applied self-image congruence measurement is either holistic or piecemeal. In the case of holistic measure, a potential disadvantage is provided by cognitive limitations intensified by low involvement of the respondent in research, because it requires a recall of



brand image or its typical user. In turn, the accuracy of piecemeal measure depends on appropriate selection of criteria for comparisons, and a limitation is suggesting the dimensions of brand or TBU perception that trigger production of image when filling out the questionnaire (cf. Avis & Aitken, 2015; Avis, Forbes, Ferguson, 2012) than measuring its actual occurrence without any interference.

As mentioned before, due to the lack of universal models of TBU-image, in self-imagecongruity methodology there is none commonly acknowledged inventories for multifaceted measurement of self-image congruence in the case of a piecemeal approach (Lückerath, 2010). There is a dissonance between marketing practice, where it is reasonable to create specific list of adjectives ad-hoc for the purposes of research of a particular brand (idiographic approach) and academic research with the aim to determine the accuracy and universal dimensions of all brands, or at least brands representing specific categories of products or services (nomothetic approach). In the latter case, the selection of universal dimension is particularly important, because the compatibility of measurement methods is crucial to accumulate knowledge.

Current piecemeal measurement, in spite of the fact that it includes multiple criteria of self-image congruity, in the vast majority of cases it is reduced to the calculation of one index, which means that the multidimensional phenomenon is turned into one-dimensional measurement. Beyond reductionism, while the global index is calculated, the problem of unweighted sum appears. The sum assumes that each trait included in the measurement of the congruity is important to the same extent for the consumer (cf. Sirgy et al., 1997). On the other hand, not all traits in piecemeal measurement may be relevant in the case of a particular category of product or brand. This results in irrelevant (empty)comparisonsfor category/brand(cf. Sirgy et al., 1997), that affect the global index. Therefore, tools which minimize the probability of empty comparisons and take into account the relevance of traits for the consumer and brand/product typical users should be developed (cf. Teichert&Schöntag, 2010).

Another consequence of the lack of knowledge about universal dimensions of self-image congruity and inventories developed on their basis is the use of tools which do not take into account the specificity of consumer context (e.g.. Five-Factor Model based inventories) or the specificity of human perception (e.g. brand personality inventories). In addition to empty comparisons and omission of relevant dimensions (i.e. lack of construct validity), domain adjustment problem occursat the level of content inventory. Individual items may be differently understood in the context of animated beings (consumer, TBU) and unanimated beings (brand), and in the context of different product categories (Avis, 2012; Landon, 1974). This requires the identification of dimensions on such level of abstraction, and the operationalisation of these dimensions, which understandingis similar regardless of the context.

Generalisability

External validity of self-congruity research in academic studies may be questioned due to unrepresentative sample of stimuli or unrepresentative sample of respondents for the population of brands/products and population of consumers, accordingly. Most of self-congruity studiesare limited to a few brands of one or several categories of products. This fact is seldom mentioned as a limitation of the study. Convenientand student samplesare further generalisability limitations of many academic studies. Consumer needs and students` cognitive possibilities may significantly differ from the general population, as a result, regularities observed among students may not be confirmed in marketing practice.



Insufficient life and psychological realism is a disadvantage of all surveys. The question is how to increase the degree of realism. Most of self-congruity research is characterised by low or moderate level of brand, usage or purchase visualisation that makes the actual process of decision making may greatly differ from that measured one (Kleijnen, De Ruyter, & Andreassen, 2005). This entails the necessity to develop such research procedures where the level of involvement of respondents in decision making process and context reflect to a large extent real situation.

Multilevel data and analysis

A potential risk for correctness of analyses in studies taking into account multiple brands or multiple product categories is limited awareness of multilevel data (Austin, Siguaw, Mattila, 2003), and consequently – the fallacy of composition (Caballero 1991) and ecological fallacy (Robinson, 1951). Because categories and brands differ as for the potential of value added to consumer self-concept and consumers differ in the perception of the same brand, these causes of variance should be taken into account in the process of multidimensional and regression analyses. In particular, if the research purpose is to create a model that explains the consumer behavior (individual level), the data need to be at least centered.

Managerial implication issue

The frequency of terms related to self-congruity in academic journals and magazines for practitioners is considerably lower in the latter ones (cf. EBSCO 1973-2016). For marketing an appropriate management of relationship between brand and consumer is crucial. This relationship should exist as long as possible and increase the likelihood of purchasing brand products (Zinkhan & Hong, 1991). Self-image congruity impacts this relationship undoubtedly. The problem lies, however, in the interactive nature of congruity, where specific brand perception faces specific consumer needs. A partial solution may be market segmentation based on results of self-congruity research (Graeff, 1996). This means the need to diversify marketing strategy with regard to separate consumer segments. Previous studies, however, lack the issue of individualised brand image creation for different users (Jamal & Al-Marri, 2007).

Although practical benefits of self-congruity theory for various industries are indicated (Boksberger, Dolnicar, Laesser, & Randle, 2010) and the importance of brand personality building in response to consumer personality are indicated (Phau & Lau, 2000), implementation guidelines are needed. A question about variation of consumer segments in terms of personality remains unanswered. It involves the following issues: (a) what questionnaires should be used to detect differences important in the context of consumer, (b) whether researcher should focus only on personality traits or take into account other characteristics and (c) whether product features are important. It is again to emphasise that direct and holistic congruity measure provide very little clues as for direction for change of brand image (Wang, 2010), in order to achieve the desired self-image congruity in a target group.

Conclusions

This critical analysis of core issues in self-congruity research allows to formulate guidelines for future research. In the first place, it should be noted that although the brand carries the symbolic image, the appropriate point of reference in congruity test should be typical brand user image, which allows human to human comparisons, correct as for methodology and theory. The relevant theoretical domain for these comparisons is social psychology. Models that describe universal dimensions of social perception at different levels of abstraction may be a point of reference in the evaluation of new models that take into account consumer to TBU comparisons.



A special challenge is developing a new methodology to measure the congruence beyond common patterns. A new measurement should perform a comprehensive unredundant measure of (a) what brand confirms in consumer self-image, (b) what brings new and positive to an existing image and (c) to what extent a brand is a threat to consumer self-concept. This measurement should be multifaceted with respect to each of the highlighted components. This requires the identification of comparison dimensions in real perception of typical brand users. In turn, in the process of operationalisation of dimensions, the selection of items should minimise the probability of generating other meanings, making independent the understanding of inventory items from the specifics of product category.

The research procedure and formula of calculating congruity indices should allow avoiding empty comparisons in terms of traits unobserved by a specific respondent in a typical brand user. On the other hand, the measurement should take into account the relevance of traits for consumer/respondent – desirability of a positive traits and the extent of avoiding negative traits. Finally, it is worth to note that the model developed and its operationalisation should be verified on the basis of brand sample, product category sample and consumer sample to ensure a broad generalisation of research results.

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