



The roles of schema incongruity and expertise in consumers' wine judgment

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ABSTRACT

Broadening the present understanding of how expertise moderates the schema-incongruity effect (i.e., the notion that a product moderately incongruent with the schema evoked for it in memory is associated with a comparatively positive product evaluation), this study argues that people with higher, not lower, degrees of expertise experience incongruity and prefer moderately incongruent products over congruent ones. Because people with low expertise in complex product categories lack a developed schema against which to assess encountered products, they will be insensitive to incongruity. People with high expertise, on the other hand, typically have developed schemata and can therefore perceive incongruity and respond accordingly.

Consumers with different levels of wine expertise participated in a study in which they were given congruent or incongruent information, as well as different levels of information elaboration, about a wine prior to tasting and evaluating it. The results of this study support the above argument: Expertise moderates the incongruity effect such that it is prevalent only for experts, and schema-level processing moderates expertise's moderating effect on the incongruity effect.

1. Introduction

Product liking in sensory analysis is connected to consumers' expectations or schema about the product. A common and empirically supported assumption is that products whose sensory qualities are congruent with consumers' expectations are evaluated more favorably than products exhibiting incongruent sensory qualities (Cardello, 2003; Piqueras-Fiszman & Spence, 2015). Recent results, however, suggest that products with incongruent qualities can be judged more favorably than products with congruent qualities (Silva et al., 2017). These later results are consistent with a stream of research that addresses the incongruity effect, that is, the notion that a product moderately incongruent with the schema evoked for it in memory is associated with a comparatively positive evaluation (e.g., Meyers-Levy & Tybout, 1989; Noseworthy, Di Muro, & Murray, 2014). An important result from schema-incongruity research is that the incongruity effect is limited to novices (Peracchio & Tybout, 1996). For example, novices evaluated an iced, speckled, nutty cupcake-size cake more favorably when it was described prior to tasting as a spicy cake (moderate incongruity) than when it was described as a high-calorie cake (congruity). For experts, this effect was not observed, assumedly because experts have elaborate and flexible schematic structures that allow them to accommodate a

discrepant stimulus and therefore deter incongruity from being perceived, whereas novices have less elaborate and flexible schemata.

Although such a results is valid for a domain or product category like cakes, the premise that novices actually employ schemata may not always hold. Cakes constitute a relatively simplistic product category in which most consumers have considerable experience. In more complex categories and in categories where consumers vary significantly in experience, this premise is unlikely to hold. In complex product categories, consumers with limited experience (novices) would arguably have rudimentary schemata compared to consumers with extensive experience (experts). Without well-developed schemata, novices will not experience any incongruity, and the incongruity effect is therefore not expected to occur. For experts, well-developed schemata exist and incongruity may therefore be experienced. Consequently, the incongruity effect is likely to occur for experts.

This research aims to test this hypothesis using wine as the focal complex product category. Specifically, this research investigates whether wine expertise moderates the incongruity effect, but with the presumption that consumers with higher degrees of wine expertise will experience incongruity and prefer moderately incongruent wines over congruent ones, while consumers with lower levels of expertise will not.

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2. The incongruity effect and expertise

Following the theorizing of Mandler (1982), several studies have examined the effects of schema congruity and incongruity on consumers' product evaluations (Carvalho, Samu, & Sivaramkrishnan, 2011; Halkias, Micevski, Diamantopoulos, & Milchram, 2017; Jhang, Grant, & Campbell, 2012; Meyers-Levy & Tybout, 1989; Noseworthy et al., 2014; Peracchio & Tybout, 1996; Stayman, Alden, & Smith, 1992). According to these studies, the very source of product evaluation is the consumer's perceived discrepancy between the product and the representation of it in memory (schema). The human memory can be viewed as a semantic network structure, called schema. Schemata allow us to make sense of, store, and respond to information we encounter in our environment (Anderson, 1988). When incoming information is easily organized into existing schemata, it can be said to be schema-congruent. For example, when a wine label states that the wine is *dry* (schema), and what you actually taste is a dry Riesling, with < 2% of residual sugar, the incoming information (taste) is schema-congruent. On the contrary, when incoming information does not fit easily into existing schemata, the information is schema-incongruent. Information is schema-incongruent if, for example, the wine label states *dry*, but the tasted wine is a medium-sweet Riesling with 30 g/L of residual sugars.

Research on schema incongruity has suggested that congruity leads to mild positive product evaluation because of familiarity; moderate incongruity leads to positive evaluation because this incongruity is cognitively resolvable (Jhang et al., 2012) and therefore associated with arousal-based pleasure (Noseworthy et al., 2014); and extreme incongruity leads to a negative evaluation because it is not easily resolvable and therefore creates tension and discomfort (Mandler, 1982). In the wine example above, the medium-sweet Riesling accompanied by a label stating *dry* constitutes moderate incongruity, whereas a sweet, late-harvest Riesling with more than 45 g/L of residual sugar would constitute extreme incongruity.

Although food research has suggested that high schema congruity leads to more favorable food product evaluation than low schema congruity does (Adams, Douc e, Janssens, Vanrie, & Petermans, 2014; Lim, Fujimaru, & Linscott, 2014), the outcome that moderate incongruity leads to even more favorable evaluation than high congruity does has been observed for foods and beverages. Stayman et al. (1992) found that consumers who held a soft drink schema in memory and actually tasted a drink that was a blend of 25 percent juice and 75 percent water (moderately incongruent) evaluated the drink more favorably than did consumers who held a soft drink schema but actually tasted a 90 percent juice–10 percent water blend (strongly incongruent) or a 10 percent juice–90 percent water blend (strongly congruent). Analogous results were recently reported by Silva et al. (2017). In a study of expectations' influence on liking of conventional and nonalcoholic beers, these researchers observed that nonalcoholic beers labeled incorrectly as beers received better taste ratings than nonalcoholic beers correctly labeled as nonalcoholic. Although these researchers attributed this incongruity effect to the name "beer" and to how positive expectations associated with "beer" might override the sensory experience, their observation is also consistent with the incongruity effect.

2.1. Expertise

An important finding from schema-incongruity research is that expertise moderates the schema-incongruity effect (Kim, Hahn, & Yoon, 2015; Peracchio & Tybout, 1996). Schemata can be elaborate or unelaborate. Compared to unelaborate schemata, elaborate schemata have extensive content, include many levels of abstraction, and integrate many interrelationships between the different pieces of information (Alba & Hutchinson, 1987; Peracchio & Tybout, 1996; Sujan, 1985). People equipped with elaborate schemata in a specific category, known as experts (Chi, Feltovich, & Glaser, 1981), are rarely exposed to incongruity because most encountered stimuli will have a well-developed

corresponding schema. To the extent that incongruity actually occurs, experts can engage schemata rich enough to accommodate discrepant stimuli without much cognitive effort. Consequently, the arousal-based pleasure associated with resolving incongruity is unlikely to be experienced by experts. For people with unelaborate schemata, known as novices, the likelihood of encountering discrepant stimuli is larger, and their schemata are not extensive enough to automatically resolve this discrepancy when it occurs. They will therefore attempt to resolve the incongruity and, assuming they succeed, will judge the incongruent stimulus more favorably, in line with the general prediction of the schema-incongruity effect. Given these differences between elaborate and unelaborate schemata, Peracchio and Tybout (1996) hypothesized and empirically confirmed that moderate incongruity affected novices' product evaluations positively, but had no effect on experts' evaluations.

Although valid in certain product categories, the arguments that novices perceive incongruity and that experts accommodate incongruity automatically, and thereby circumvent the perception or feeling of incongruity, may not hold in other categories.

The incongruity effect is a schema-level phenomenon. An established schema is required for incongruity to emerge; otherwise, the stimulus has nothing to be incongruent *with*. Equipped with only underdeveloped or rudimentary schemata, novices are therefore unlikely to notice any discrepancy between schema and stimulus. Novices tend to focus on surface information, such as visible product attributes and single attributes, rather than on integrated information and attribute interrelationships that characterize a schema (Gregan-Paxton & Roedder John, 1997; McKeithen, Reitman, Rueter, & Hirtle, 1981). Novices are likely to interpret information literally and in the order it is presented (Adelson, 1984; Alba & Hutchinson, 1987; Chi et al., 1981; Johnson & Russo, 1984; Maheswaran & Sternthal, 1990). Their knowledge representation may simply not contain enough relations to enable novices to recognize similarities between a base (schema) and a target (Gentner, Rattermann, & Forbus, 1993).

Consistent with this reasoning, observations in psychology and consumer research support the idea that novices are relatively insensitive to discrepancy of information from schema or other corrective feedback (Fiske, Kinder, & Larter, 1983; Kruger & Dunning, 1999; Sujan, 1985). Sujan (1985), for example, found that novices were less likely to respond to match versus mismatch between incoming product information and product category schemata in memory.

Considering the view that novices are less likely than experts to notice schema incongruity, how can Peracchio and Tybout's (1996) finding that the incongruity effect is prevalent for novices—even confined to them—be explained? Research has shown that in simpler categories, individual differences in expertise tend to converge (Hunt, 2006). In Peracchio and Tybout's (1996) study, the product category was relatively simple (i.e., desserts and cakes), such that both expert and novice participants were likely to have established product category schemata. In noncomplex categories, most people may establish schemata on the basis of extensive experience alone (Ericsson & Lehmann, 1996). Therefore, it is likely that novice participants in Peracchio and Tybout's (1996) study actually experienced incongruity.

Many categories are, however, complex and ill-defined. In wine tasting, the number of winemakers, styles, vintages, regions, grape varieties, and modes of vinification make wine tasting a complex endeavor. Consequently, predicting and recognizing a set of particular sensory characteristics in a wine are arduous tasks. In the wine category, it is unlikely that anyone can develop schematic structures sophisticated enough to process incoming stimuli automatically. The ability to automatically process incoming stimuli develops slowly and requires much practice, as well as stimuli that do not vary much (Alba & Hutchinson, 1987).

Additionally, expertise consists of more than experience or familiarity (Alba & Hutchinson, 1987; Ericsson, Krampe, & Tesch-R omer, 1993; Ericsson & Lehmann, 1996). According to Ericsson and

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