



INVESTIGATING THE CHALLENGES FACING BRAND LOYALTY: A CASE STUDY OF THE BELL LAGER BRAND, UGANDA BREWERIES LTD

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Abstract

This research focused on investigating brand loyalty for Bell Lager beer brand in Uganda. The fact that the beer sector in Africa is increasingly changing with international brands expanding into Africa, it is important to observe and establish where the growth of existing and new brands will be sourced from. This study aimed at understanding, if the Bell Lager beer brand that coexists with numerous beer brands had loyalty challenges and, if there were any, what were these challenges. The study was commissioned in the capital city of Uganda, Kampala, among 100 respondents in three busy suburbs. The main assumption was that, due to the proliferation of beer brands in the Ugandan market in respect of loyalty to beer brands was bound to alter, based on increased choice. This study benefitted from a mixed strategy research approach. The respondents were sampled using judgemental sampling. This was chosen because the researcher needed to interview people drinking Bell Lager beer among all other drinkers, hence the need to identify them by the beer they drank.

Keywords: Challenges, Brand, Beer, Loyalty, Growth, Proliferation, Identify, Market

Introduction

Brand loyalty involves intrinsic commitment to a brand based on distinctive benefits or values it offers its consumers. Kardes and Cronley (2014:229) explain that brand loyalty is the end result of relevant brand management and consumer engagement. Consumers progress through stages of brand awareness, brand trial, brand image, brand preference, brand habit and eventually brand loyalty as an end result. Cant, Brink and Brijball (2006:240) refer to a situation where the consumer strongly prefers one brand to others. The beer industry consists of breweries that make the beer and they exist in nearly every country. Transparency Market Research (n.d.) explains that beer is a starch made from malted barley that is fermented and brewed. Varied forms of beer can be obtained by effecting alterations to this basic beer-brewing process. Some of the most common types of beers consumed today include: bitters, ales, and stouts. Boesler (2014) notes that the market for beer brands more often tends to be local than global.

Uganda Breweries Limited (UBL), a subsidiary of East African Breweries, has been a leading brewer in Uganda since it began operations in 1946. Located in Port Bell – Luzira on the outskirts of Kampala, Bell Lager is the company's flagship brand, having been in the market for over 60 years.

Aim of the Study

To investigate the challenges facing brand loyalty of Bell Lager in Uganda.

Objectives of the Study

- To examine the factors that influence loyalty for Bell Lager beer.
- To investigate the challenges of brand loyalty for the Bell Lager brand;
- To investigate how these challenges can be resolved and mitigated.
- To recommend ways that Bell Lager brand loyalty can be improved.
- What are the challenges of Bell Lager brand loyalty?
- How can the challenges Bell Lager be solved?
- What recommendations can be made to Bell Lager so that brand loyalty can be improved?

Literature Review

Beer Industry in Uganda

A report from BMI Research (2014) explains that Uganda's beer market is highly competitive, with global drinks firms Diageo and SABMiller both well established. The report further forecasts that between 2014 and 2017, US dollar beer value sales in Uganda will grow at a compound annual rate of 21.2% to nearly US\$1bn, which will be very supportive of the on - going expansionary initiatives pursued by Diageo and SABMiller. Global beverage giant Heineken has opened a regional headquarters in Nairobi as reported by Wangui (2011:1) to help push its brands in the market, setting the stage for a market share war with East Africa Breweries Limited (EABL) and SABMiller. Heineken's aggressive African strategy, especially in Anglophone countries, is set to open a fresh round of beer wars in the continent (Wangui, 2011:2). Heineken entered the Ugandan market in 2012 as an independent entity, not relying on third party distributors as it had previously done.

Brand Loyalty Description

Babaraju (2014:143–144) explains that brand loyalty is repeat purchase with a reason to prefer that product over another. Brand loyalty can only be achieved through a strong brand positioning which means creating a positive brand image. It can be achieved by creating and managing a brand's "unique, credible, sustainable and valued place in the customer's mind which in turn gives product or service a competitive advantage" (Babaraju, 2014).

In David Aaker's brand equity model (Eurib, 2009), he explains the extent to which people are loyal to brands through the following ways:

- Reduced marketing costs (hanging on to loyal customers is cheaper than charming new customers);
- Trade leverage (loyal customers represent a stable revenue for the distributive trade);
- Attracting new customers (loyal customers can help boost name awareness and hence bring in new customers); and
- Time to respond to competitive threats (loyal customers that are not quick to switch brands give a company more time to switch to competitive threats) (Eurib, 2009:1–3).

Formation of Brand Loyalty: Stages of Brand Loyalty

This study will endeavour to understand brand loyalty as the core subject. Brand loyalty is not an instant occurrence, becoming brand loyal is essentially a learning process which takes place over a period of time (Cant, Brink and Brijball 2006:240). This is demonstrated in the stages explained below that define stages and progression of a consumer before they finally claim that they are brand loyal to a particular brand.

Stage 1: Brand Awareness

After a brand has been created, the sales and marketing team need to induce consumers to choose the brands so that the brand can pick up good momentum on sales and gain some market share. This inducement can be done by creating brand awareness, making the brand known. Hsu and Cai (2009:5) in the Conceptual model of Destination Branding also supports the idea that brand knowledge is the first step which forms the basis of brand trust and, consequentially brand trust influences brand loyalty. This can be achieved through advertising (radio, television, internet, social media, billboards) and activating awareness where the brand is located (on premise) through signboards, testing and trial for edibles, touch and feeling for motor vehicle category, price reduction to encourage customers to try it, etcetera. Brand awareness is the strength of a brand's presence in the consumer's mind and is measured by recognition and recall (Jooste, Strydom, Berndt and du Plessis, 2008:368).

Stage 2: Brand Trial

Consumers according to Cant et al. (2006:242) need to try a brand to know it beyond the label and packaging. Trying a product can be in many forms like sample-size free giveaways of the product to be tried. Beverages can be tried through sampling consumers in designated areas. Some car buyers will be given test drive of a car they desire to buy. After trying a product, a consumer can start to evaluate the product and perhaps make a decision on whether they want to buy it at another occasion or continue using what they have previously been using.

Stage 3: Brand Image

Brand image as described by Jooste et al. (2008:371) is the perceptions about a brand as reflected by the brand associations held in consumer memory. A positive brand image is created by marketing programmes that link strong, favourable and unique associations to the brand in consumers' memory. The strength of the associations depends on consumers' brand experiences (Jooste et al. 2008:372). The consideration of the brand image is assessed against what the consumer's character is, their values and perception of the product category (Cant et al., 2006:242).

Stage 4: Brand Preference

This is the tendency to select a brand or product from among a set of known available brands (Cant et al., 2006:243). The behavioural definition of customer loyalty as explored by Peppers and Rogers (2004:57) elaborates that loyalty is not a cause but the result of brand preference. A consumer is willing to pay a premium for brand A over brand B even without respect to attitudes or preferences that underlie that conduct.

Stage 5: Brand Habit

MacInnis, Park and Priester (2014:44) define brand habit as a behavioural disposition in which past responses are triggered directly by associated context cues. A consumer who prefers a particular product will habitually buy it without thinking about or evaluating it and such a person may display repeated buying behaviour (Cant et al., 2006:243). According to MacInnis et al. (2014:44) repeated patronage can reflect strong habits and be cured by stable features of purchase and consumption contexts.

Stage 6: Brand Loyalty

Brand loyalty reflects a favourable evaluation that is held with sufficient strength and stability to promote a repeatedly favourable brand response (McInnis et al., 2014:49). Consumer brand preferences promote repeated purchase and consumption by positively influencing behavioural intentions.

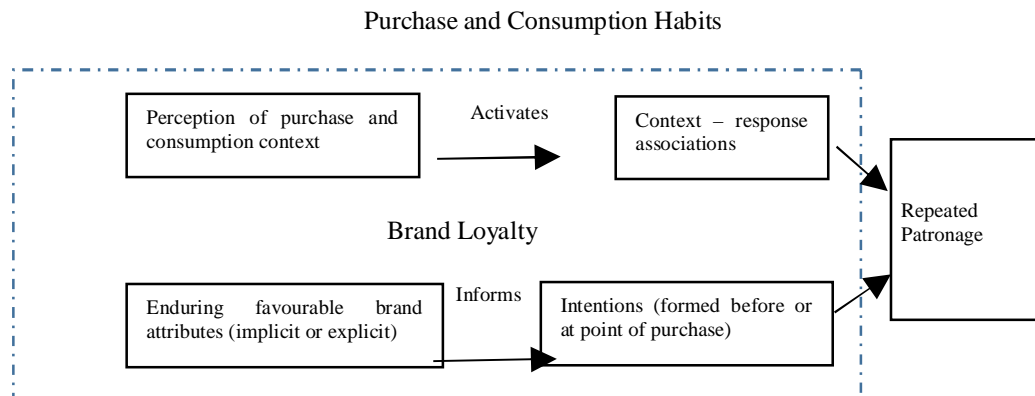


Figure 2.1: Two determinants of Repeated Patronage: Habits and Brand Loyalty

Source: (MacInnis, Park and Priester, 2014:45)

The figure 2.1 above elaborates that a combination of perception of purchases made while being exposed to brand attributes creates an informed and activated transaction that leads to repeated patronage and hence brand loyalty.

Factors Influencing Brand Loyalty

A brand as elaborated by Muhlberg (2005:3) is the sign that distinguishes one product from another; that tells consumers that they can expect the same quality from all products featuring that sign. It further enlightens that brands have evolved from the commonly known fast moving consumer goods to sports clubs, service companies, individuals and some prominent charities.

A brand can be recognised through a brand name. Shimp (2008:71) explains that a brand name can influence trial of a new brand influence future sales volume. A product's brand name plays a major role in determining its immediate success upon introduction and its sustained prosperity as it matures.

Hence the unintentional habit for consumers to consistently seek a particular brand name will eventually lead to brand loyalty for that brand. In an empirical study done by Nasirabadi and Bokaei (2013:1907–1914) brands are seen as vital for attracting customers, making purchases and affecting repurchases.

The brand image that is perceived in consumers' minds as a result of exposure to brand cues in different elements of the promotion mix; advertising, packaging, sales promotion and pricing. Consumers tend to perceive products from an overall perspective associated with the brand, features and experience of buying and using the product. Brand image adds value to products and influences brand preference (Cant et al, 2010:238).

Studies like Nasirabadi and Bokaei (2013:1907–1914) have explored price relationship to brand loyalty and found that there is a positive relationship between price and brand loyalty specifically in category of sportswear. The results elaborate further that the long-term loyalty and the services offered to loyal customers increase the tolerance of the customers towards higher prices.

Brand Loyalty and Repeat Buying Behaviour

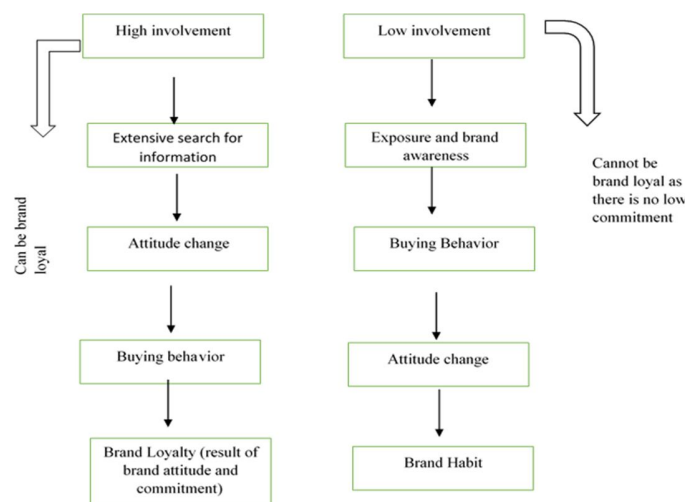


Figure 2.2 Levels of Involvement and Brand Loyalty

Source: Cant et al. (2006:241).

Figure 2.2 above examines the process that leads to brand loyalty by comparing two involvement levels as a starting point. It summarises that high involvement will consequentially develop into brand loyalty for a product/service while low involvement will result in brand habit which is not necessarily brand loyalty. Knowing when to distinguish brand habit from brand loyalty is crucial in directing the brand strategy towards positive brand growth by marketing managers.

The Influence of Market Type and Demographics on Brand Loyalty

In an effort to understand the dynamism of brand loyalty, Ioan (2005:737–742) specifically investigated how demographics and type of product category can affect loyalty in Romania. The investigated population was checked considering their demographical characteristics (age, income, education, gender, and etcetera) but also their vocabulary, intelligence level, technical knowledge and degree of usage regarding existing products and brands.

Secondly, the investigated consumers had to describe their behaviour and attitude, what they do and what they think about the analysed product categories and corresponding brands. The product categories were durable and non-durable brands; the particular product categories chosen for the research consisted in toothpaste, as being representative for the non-durable product category, and television sets (for durables) (Ioan, 2005).

Ioan (2005:737–742) concluded that brand loyalty varies among income and gender categories and specifically among non-durable products. Brand loyalty for durable products varies according to age and education. A high-intensity level of distribution was a determinant of brand loyalty in the non-durable products and price level stability.

Brand Loyalty and Segmentation

Brand loyalty can be used to understand and plan for the market better. Segmentation analysis is the process of identifying consumers who are more likely to be influenced by an effort to market a specific product, service or brand than the rest of the market population (Cant et al., 2006:244). Effort makes execution of marketing activities more targeted to the right people.

Joseph and Sivakumaran (2009:263) explain the need for loyalty-based segmentation in their study of the market for effective brand equity management. The results of their study would help managers in deciding which type of promotion is to be used in markets dominated by customers with a particular level of brand loyalty.

Mancini (2009:6) advises that using consumer segmentation to build customer loyalty can help companies prosper even in a difficult economy with comprehensive data and a willingness to modify practices throughout the enterprise. By shifting resources away from mass marketing channels to a focused campaign that puts their best customers front and centre, businesses can improve sales and decrease costs, while building a loyal clientele that allows them to weather this challenging market. When the economy does turn around, a loyal customer base provides the best platform for future growth (Mancini, 2009).

Brand loyalty in various Cultural Contexts

Brand loyalty according to (Cant, 2010:240) is a situation where a consumer strongly prefers one brand to others. Palumbo and Herbig (2000:116–125) expand the discussion to explore brand loyalty in different cultural contexts. The study reveals that 61% of European adult shoppers do not switch brands frequently, they stick to a brand they like in a category. Consequentially, brands have endeavoured to facilitate brand switching through coupons and strong brands like P & G exploring price cuts (Palumbo & Herbig, 2000:116-125). The Japanese brand loyalty skews to recognisable brand names that symbolise status and image. Japanese consumers need to view a company as trustworthy in order to prefer a brand made by that company as favourable. Brand loyalty in America differs because of the many cultural groups that exist in America. Palumbo and Herbig (2000:116-125) advise that identifying the similarities between the immigrants in the United States and the countries from where they come from is crucial in identifying what motivates their brand choice and ultimately brand loyalty.

Brand loyalty for beer in Africa, according to Sjoberg (2014:2) cannot be discussed without looking at the beer-drinking population, which consists of a larger younger population that is more prone to consume imported beer as it has been exposed to and interacted with international beer brands through travelling, studying abroad, working abroad, and via a general global connection thanks to increased Internet connectivity. Even with this window of opportunity for international beers, Sjoberg (2014:2) advises that the Millennials are loyal to the lager brands of their preference, and domestic beers need to focus on selling an experience and lifestyle instead of focusing on beer attributes in a bid to reach this target group.

In Uganda strong brand loyalty lies mainly in international brands, and this can be attributed to the lack of the local brands meeting expected international quality standards, packaging and the lack of nationalistic/patriotic branding of local brands. Consumers have not been educated on the inherent strength of the local products (Nyambura, 2013:1–5).

Challenges of Brand Loyalty

The World Bank Report (The World Bank Group, 2015:3) cites that global growth was disappointing in 2014 but is expected to pick up in 2015–17. As a result, there is a small response of demand. Post-crisis uncertainties associated with financial vulnerabilities, rapid household debt growth, elevated unemployment, and slowing long-term growth potential may encourage households and corporations to save real income gains from falling oil prices, rather than to consume and invest (The World Bank Group, 2015:164). Given this background, it appears the consumer has not increased their spending. Consumers have chosen a narrower set of brands to be loyal towards, and price positioning is playing an important role in determining loyalty (Deloitte, 2014:5). In further agreement, Roberts (2015:5) cautions that it is getting harder to command premiums on brands and this lies greatly in consumers having so much information, consumers being extremely savvy navigators and having no hesitation about consulting reviews, comparing prices and checking social media currency. With consumers equipped with information about brands and their competitors, consumers' loyalty to brands might not be as steadfast as anticipated since they perceive that they can get more affordable brands to deliver the same benefits.

Roberts (2015:6) explains that technology has reset the loyalty game and the tech-led empowerment of customers will only grow as the “Internet of Things” connects everything to everyone. The technological age has raised the stakes for winning. It has raised the resonance bar for brands to great heights. Consumers expect more for less, and can switch brands faster (Roberts, 2015:6).

Changing demographics, as explained by Pontinen (2009:10) in the USA, will change the beer frequency and consumption since the growth in diversity in ethnicity in the USA population can change consumer preferences. As the population shifts toward one group or another, “Generation Y” has recently begun turning 21, and consumption patterns will change. The age-population composition can influence brand loyalty. Millennials are loosely defined by Clarke (2012:1) as those coming of age after 2000 and these younger consumers are more adventurous than the usual beer drinkers. This age group can be seen as an opportunity for the expansion of the beer drinking population except their loyalty depends on the brands available to them and their positioning. CPS Daily News (Anonymous, 2014) cautions that brand loyalty is not a major pull for Millennials citing that when a national brand they wish to buy is not available at the shelf, four in 10 choose the store brand, one third pick a different national brand and one in eight looks elsewhere for the national brand they initially wanted.

Economic globalisation is the global integration of economies through trade and investment flows, as well as the production of goods and services in order to enhance international competitiveness (Passaris, 2006:2). Pontinen (2009:12) explains that consolidations and partnerships among large brewers have altered the dynamics of the industry, creating larger companies with greater market share and concentration of revenues, and greater profitability. While these changes may be good for the major brewers, they may limit the power of smaller brewers, especially craft brewers, with fewer resources. While competition may be difficult to manage within the industry, it may be beneficial to the consumer in the form of numerous choices and potentially lower prices (Passaris, 2006:12).

Changing consumer tastes and preferences may pose a challenge to brand loyalty. According to the 2010 USA Census, Latinos make up 16% of the USA population. Latinos have traditionally leaned toward Mexican imports or beers from their home country. CSPnet, an online publication, explains that Latino beer-drinkers’ tastes are changing (Anonymous, 2014). Pontinen (2009:12) adds that the globalisation and a larger market bring additional consumers with ever-changing preferences. The beer industry has continually responded to consumer preferences whether by introducing lower-calorie options, greater variety, or alternatives to wine and spirits. Adapting to changes in preferences on a global basis could differentiate one brand from another (Pontinen, 2009:12).

Literature on Beer Brands across the World

Beer in the European market: Beer is the predominant alcoholic drink in most of the European countries, and has a large share of alcoholic drinks in all markets, reflecting the growing influence of British and American drinks companies. The past two decades have seen an increased commitment on behalf of beer producers to exporting, reflecting the belief that this is an appropriate means of mitigating the stagnation of output on the home front. Today a few large breweries, the majority of which are European, principally control the global beer market. However, from country to country there remain significant differences with regard to the number and size of breweries, the effect of this on the structure of the overall industry being considerable (Vrontis, 1998).

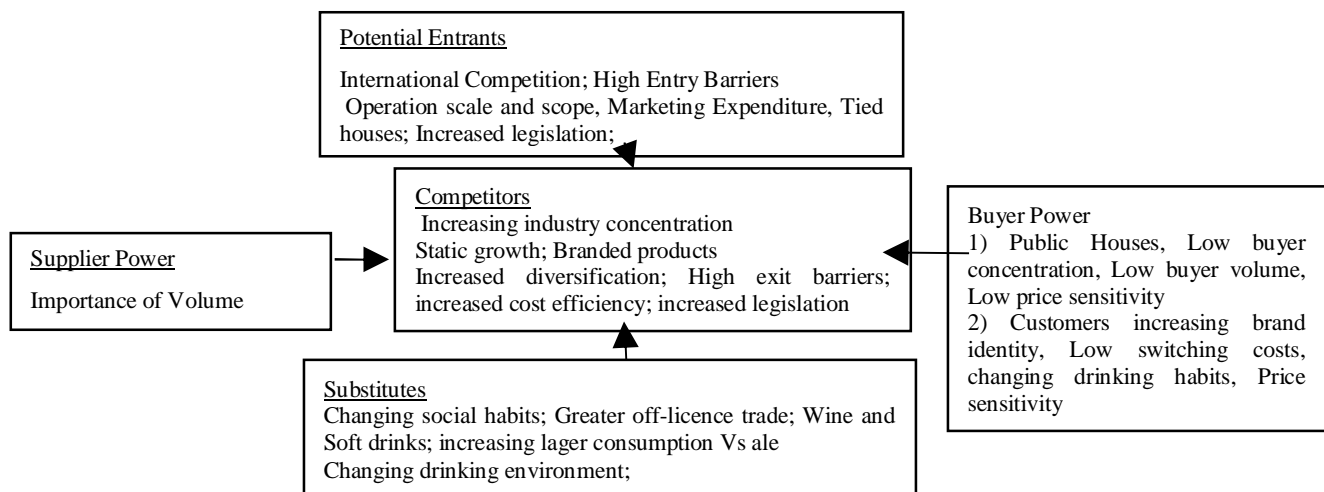


Figure 2.3 Five Power Forces (The Brewing Industry)

Source: (Vrontis, 1998:76-84)

The above Figure 2.4 highlights the five power forces of the brewing industry in Europe in a 1998 setting, but it is noticeable that even in the current setting in 2015 some of these forces are relevant to the brewing industry in Africa. The world beer market was characterised in 1995 by continuing internationalisation and increasing competition, with the saturation of domestic markets posing an ever-augmenting threat to key industry participants. The KPMG (2014:6) report reveals that there is increased legislation on unregulated alcohol because of the health risks, hence enhancing the importance of branded beer. There is increased international competition seen through the large multinational companies such as SABMiller, Diageo, Heineken, and Castel have already acquired significant interests in African brewers (KPMG, 2014).

Beer in Asia: The BBC Magazine Singapore enlightens that the forecasts for beer consumption (by volume) will grow by 4.8% in Asia Pacific every year between 2011 and 2016. Part of the reason is Asia's growing and young population and the increase in prosperity in many Asian countries in recent years. China is also now the world's biggest beer producer, brewing 44bn litres in 2010 while the biggest growth prospects in the region are Vietnam, Cambodia and Laos, where Euro Monitor forecasts that volumes drunk will grow at up to 9% per year between 2011 and 2016 (Syed, 2012).

Beer in Uganda: Uganda is one of the biggest five beer consumers in Africa, with a consumption capacity of eight litres/individual/annum (Kalungi, 2012:4). According to Kalungi (2012:2) the growth of beer consumption is boosted by a string of factors that include GDP growth, rapidly growing population, laissez-faire government policies on beer, aggressive marketing and improvements in the quality and appearance of beer brands. Several people are drinking beer now because they have free money to spend. Many beer drinkers drink beer because their lifestyle and economic situation has dictated it. With the endless electricity load shedding and growing unemployment, people are forced to be in bars during both day and night. Because of this more beer is drunk, and this is reflected in the growth figures. It does not necessarily mean that people have money, as they are spending the very little they earn on beer (Kalungi, 2012:2).

Uganda Breweries Limited: According to the EABL website (2015), Uganda Breweries Limited is part of the East African Breweries Limited with headquarters in Nairobi, Kenya. UBL has been a leading brewer in Uganda since it began operations in 1946. Located in Port Bell – Luzira, in the outskirts of Kampala, the brewery is continuously modernised and its operating capacity expanded. The plant has a total brewing capacity of a million hectolitres per year, which is set to grow by 50% with on-going investment in expansion of the brew house. Bell Lager is the company's flagship brand, having been in the market for over 60 years (<https://www.eabl.com/about-us/the-group>). Looking at the performance snapshot below, volume share for UBL dropped by two points in a year and price increased by 16% in a year.

Table 2.1: Uganda Breweries Performance November 2012 – November 2013

	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13
Total UBL beer													
Volume share	41.2	38.9	38.9	39.4	39.2	39.5	39.6	39.7	39.0	38.3	39.4	38.7	39.2
Value Share	45.3	41.6	42.9	43.5	43.3	44.1	44.3	44.4	44.3	43.8	44.9	44.0	44.6
Price p/Ltr (UG shs)	5699	5732	6272	6290	6276	6373	6376	6360	6500	6542	6504	6494	6547
Weighted Distribution on hand	94	94	94	95	95	95	95	95	94	94	95	95	96
Weighted Out of Stock	1	0	0	0	0	0	0	0	0	1	0	0	0

Source: (ACNielsen, 2013a)

Bell Lager volume share as seen in Table 2.2, below in November 2013 at 13.9% had dropped from 19.2% in earlier 2011. The brand is still commanding a premium, as seen in the fluctuating prices month on month.

Table 2.2: Bell Lager performance November 2012 – November 2013

	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13
Total Bell Lager													
Volume share	14.9	13.7	14.0	14.4	14.0	14.5	14.4	14.7	14.2	14.1	14.2	13.5	13.9
Value Share	14.9	14.7	14.8	15.2	14.8	15.2	15.2	15.5	14.9	14.9	15.0	14.3	14.6
Price p/Ltr	5193	5738	5983	5998	5989	5995	5998	5997	6018	6018	6016	6020	6019
Weighted Distribution on hand	91.1	91.2	89.7	91.9	90.6	92.2	92.8	92.3	91.7	92.0	92.4	92.3	92.5
Weighted Out Of Stock	6.6	4.8	6.2	6.5	3.4	3.7	2.4	5.0	5.5	4.0	2.8	3.1	2.3

Source: (ACNielsen, 2013a)

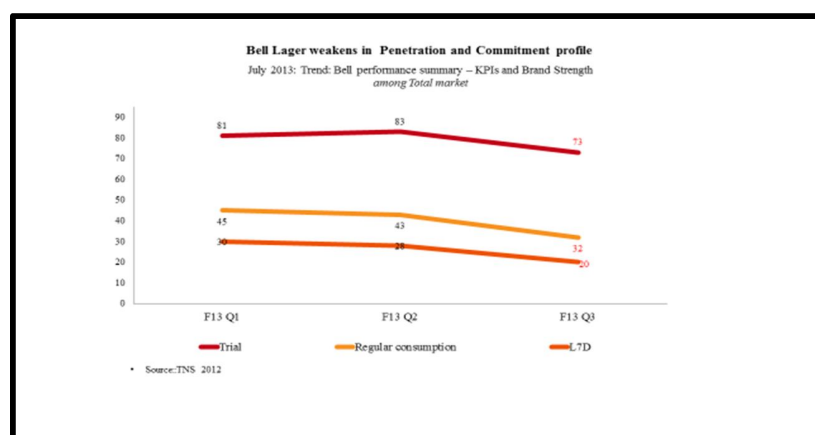


Figure 2.4 Bell Lager Consumption Performance, Quarter 3 2013

Source: (ACNielsen, 2013b)

Figure 2.5 above was extracted from the UBL attitude and usage report for 2013, and it briefly reports that the trial, regular consumption and weekly consumption of Bell Lager were on the decline in November 2013. Brand trial, as explained by Cant et al. (2006:242) necessitates consumers trying a brand to know it beyond the label and packaging. Koekemor and Bird (2004:314) further explain that there appears to be an agreement between researchers and practitioners that sampling is effective in stimulating trial purchase. It stands to reason that if consumers consider the sampled product superior to competing brands, sampling will indeed lead to repeat purchase of the product (Koekemor & Bird, 2004:314). Bell Lager is not a new brand, but looking at the research measurements above the trial of the brand is monitored. Looking at the decline above, if trial for Bell Lager is declining, the assumption is that there is a decline of new consumers adopting the brand as part of their usual drinking. Hence Bell Lager's growth is at a risk of declining, hence stagnating the growth of the brand.

Trends in the Beer Sector Worldwide

Beer Growth Prospects

Region	CAGR (2013-2017F)
Africa	5%
Asia	4%
Australasia	1%
East Europe	0%
Latin America	3%
Middle East North Africa	4%
North America	1%
West Europe	-1%

Figure 2.5 Beer volume 4-year Growth Forecast (CAGR) by region – 2013-17

Source: Baker, 2015:1

The African beer market is exploding, as advised by Baker (2015:1), with research predicting an annual average growth rate of 5% between 2013 and 2017, making it the fastest-growing region in the world. Health risks associated with homemade alcohol, combined with growing populations, reduced foreign debt and improved economies in African nations, are causing African consumers to move away from home-brewed beers and drinks at a growing pace, trading up to commercial beers and then on to more premium products (Baker, 2015:1).

SABMiller is concluding a deal to merge with Anheuser-Busch InBev in October 2015. The merger, which values SABMiller's equity at \$104 billion, will bring together companies that currently account for one in every three beers drunk across the planet, creating a group that will become either number one or two in virtually every major market in the world (Smith, 2015:2). Colley (2015:2) foresees some disappointments with the merger to the consumers, like the product range to be reviewed and reduced to allow for greater investment in marketing the retained brands. This might reduce the choice of SABMiller brands as consumers knew them. He goes on to discuss that greater market power arising from mergers usually results in higher prices (Colley, 2015:2).

Emergence of Craft Beer: Research done in the USA highlights the Brewers Association's mid-2010 report that shows the overall beer consumption fell by 2.7%, with domestic brands down 2.9% and imports down 9%. Craft beer sales by contrast increased 9% by volume and over 12% by revenue, providing the only positive news for the industry (Murray & O'Neill, 2012:899–909). In the study done in the USA to examine the underexplored niche market potential of craft beer, the survey results clearly show that home brewing is meeting the needs of its practitioners with a robust 99% (approximate) of the scores recorded as satisfied. The commitment level of 93% of respondents identified themselves as passionate or enthusiasts. In examining the high average income level and passion for craft beers exhibited by the sample indicate that craft brewers and enthusiasts may well be a market segment of interest in the USA (Murray & O'Neill, 2012). In 2014 the reports showed that 3 200 small craft brewers aggregated together sold more beer than Budweiser, a leading USA beer brand (Soref, n.d.:3).

Africa saw its first official craft beer produced locally in Mauritius in 2012 under the investment of an entrepreneur (Macleod, 2014). Craft beer production opportunity in Africa arises against a backdrop of a large sector of local brew production. Africa Yield explains that home brews, often with local and even tribal distinctions, are widespread. But governments across the continent are making a concerted effort to clamp down on them because of the health risks as well as the lost tax revenue. Consumers too have shown a preference for regulated beers, where they can afford it.

Branding and Beer Marketing in Africa: In a bid to understand branding of beer brands, Kitwe and Onishta (2014:4) explain that Nigerians like larger-than-life names; the country's leading brand is called Star, SABMiller named

its beer Hero. Its label features the rising sun, an icon of the local Igbo people. SABMiller uses such symbolism in other African markets to give its beers a local identity. “People badge themselves with beer,” says Alan Clark, the company’s overall boss. “It has an emotional content.” The firm’s brand in Zambia is Mosi, the local name for Victoria Falls and the label depicts the frothing waterfall. Tanzania’s best-selling beer is Kilimanjaro, deriving its name from the highest mountain in Africa, located in Tanzania (Kitwe & Onishta, 2014:4). Research was done on monitoring alcohol marketing in Africa by De Bruijn (2011:68) and it explains that drinking or buying alcohol is often connected to a successful life which means having a successful career, being popular and rich. Nigeria’s Star Big Life campaign markets the message that drinking Star beer is the beginning of the “big life”. National consumer promotions have prizes like cars, houses and money. In Uganda, consumers can live life “confidently” with Bell beer. The brand communication claims that drinking Bell beer makes your dreams come true (De Bruijn, 2011:68).

Alcohol companies make a connection between the alcoholic beverage (brand), sport and western lifestyle. For Guinness, there is a (sport) hero in everyone. Additionally, Guinness sponsors the national football teams in Nigeria, Ghana and Uganda, and communicates the campaign “Guinness Cheers with you”. Heineken is sponsoring UEFA Champions League, which is very popular in Africa (De Bruijn, 2011:69). Football is key for African youth and some of the African heroes have made it to the international football stage. The choice of sport for beer companies can be traced in the research done by Wenner and Jackson (2009:284–285) that elaborates that there is a frequent intersection between the consumption of sport and beer. The sports and beer synergy is cemented in a social justification. The environment where sports are watched is usually pubs, where beer is predominantly drunk. Wenner and Jackson (2009:57) explain that historically, football in the United Kingdom was played by working class people and watched by them. Beer was the ultimate choice for the working class. This social connection established the relationship between beer and football as far back as the 1800s. SABMiller sponsored the Colombian national team in the 2010 World Cup. AmBev sponsored the Brazilian national team (Wenner & Jackson, 2009:86).

Beer advertising as explained by Holden, Ruark and Hemingway (1994:2) has promoted drinking (industrially produced) alcohol as part of the national tradition and portrays the national pride. Tusker Lager in Kenya run a marketing communication campaign, “My Country, My Beer”, aimed at uniting Kenyans with their favourite beer, and helped repulse the onslaught of powerful competitors. The brand has always been seen as Kenya’s pride, and hence that of the company (Holden et al., 1994:2). Alcohol companies have initiated all types of corporate social responsibility initiatives to market a positive image of the alcohol company and the product alcohol in the sense that they are contributing to a better world (De Bruijn, 2011:69). The high investment from beer companies in the community for issues that the community holds close (HIV, clean water, freedom of press) create the “bond” and communities feel indebted to support the beer companies because of the contributions they are making. Beer brands have been predominantly been positioned with a masculine tone. Beer advertisements in Australia tend to be conservative renditions of an imagined homosocial life within a nostalgically conceived male-dominated society under challenge from a range of directions, including the decline of male manual labour and advancement of gender equality (Wenner & Jackson, 2009:207). The concept of hegemonic masculinity, as highlighted in Wenner and Jackson (2009:164), refers to the “culturally idealised form of masculine character” which associates masculinity with “toughness and competitiveness”.

Thompson (2014:4) explains that Guinness revisited the old slogan with a hugely successful marketing campaign across Africa that cast a young, strong, journalist character named Michael Power as a sort of African “James Bond”. At the end of a television or radio adventure, Power saved the day and uttered the same catchphrase: “Guinness brings out the power in you!” The Michael Power campaign was hugely successful since it played into cultural ideals of a strong African male. Wenner and Jackson (2009:98) further explain that Guinness created and used the Michael Power character for its brand identity in the African market and that Michael Power was to embody the values of the Guinness brand while simultaneously functioning as a representative subjectivity of African culture for the African market place. Guinness’ key brand benefit (KBB), “Guinness brings out your inner strength”, crafted to fit with the brand essence and self-described brand identity of Guinness as “masculine, strong, genuine and independent”, the KBB becomes coterminous with masculinity (Wenner & Jackson, 2009:100). In support of the masculine tone, Clarke (2012:2) observes that beers which try to present themselves as particularly women-friendly face almost universal derision and scorn on the website’s forums for being patronising. The women themselves do not want to be targeted that way.

Target Population

This study's target population was the beer-drinking males and females between 20 and 49 years of age. Although the life expectancy of Ugandans according to 2013 statistics was 59 years, I chose to sample, the age group up to 49 years, owing to the fact of their purchasing power. The incidence of beer drinkers to the total population in Uganda was 9% (World Health Organization, 2014:1). The beer drinker population above the age of 15 years was estimated at 3 058 830 (9% of population).

Table 3.1: Target Population

Study Population	
Incidence of drinkers	9%
Population >15 years	17 333 370 (51% of 33 987 000)
Beer Drinker population >15 years 9%)	3 058 830
Non-beer drinkers >15 years	14 274 540
Kampala population (2015)	1 923 700

Source: (World Health Organization, 2014)

The target sample for this research was judgementally sampled from beer drinkers in Nakulabye, Makindye and Kabalagala, which are suburbs in Kampala, Uganda's capital. These three areas have higher urban/semi-urban setting characteristics than the rest of the country. These suburbs are characterised by long streets of bars situated next to each other and the populace characterise these areas as predominantly entertainment areas. The suburbs are also located near industrial working areas hence consumers use them on their way home or to divert from the end of day heavy car traffic. Respondents in these areas were sampled in the following ways; Nakulabye (70); Kabalagala (28) and Makindye (1). Local councils prevented the interviewer from carrying out research in Makindye in spite of the letter of approval from the county office.

Data Analysis

After data collection the questionnaires were serialised to monitor progress. Variables were created in SPSS to support the proper data entry. The responses were edited, coded and entered into the computer using SPSS. Editing was done to enable detection of errors and misleading/false responses, and to establish questions that had not been responded to. Coding was done to hasten data analysis by clearly identifying variables, their values and labels. All these were defined in the data view of SPSS. The various ages of respondents were grouped into two categories; the under 35 years and over 35 years. After entering raw data into SPSS, analysis was done by use of the appropriate tools under the compute/analyse menu in SPSS to generate both descriptive and inferential statistics. Cross tabulation was used to analyse the relationship between the independent variable (age or gender) and the various dependent variables (brand choice, Bell Lager marketing, loyalty categories, brand loyalty challenges, and Bell Lager improvements). The qualitative data was presented in a pie chart and it was analysed by measuring the distribution.

Limitations of the Study

This research had several limitations that suggest that different approaches for future research may be useful in further exploring the issues investigated in this study. The first limitation was the geographical coverage. The limitation was that this study eliminated the rural beer drinker. Research studies after this need to cater for the rural drinker, as these settings might dictate a varying context of brand loyalty given the affordability and the high incidence of illicit brewing in rural areas.

Secondly, this study focused on the beer category which limited the generalisation to other industries like the alcoholic spirits industry. Since beer drinkers have varying preferences compared to non-beer drinkers, their buying behaviour and attitude cannot be

Results, Discussion and Interpretation of Findings

Response Rate

The sample size for this study was as follows:

Questionnaires: A total of 100 persons participated as respondents in the interviews. The respondents' rate of response was 100%. There were some answers that were missing in some questionnaires. The neighbourhoods that were covered were Nakulabye (70.6%), Makindye (1%) and Kabalagala (28.4%). Themes were identified that would answer the research questions and the questionnaire was divided into these themes. This research was divided into four themes: brand loyalty for Bell Lager; brand identity, personality and loyalty segmentation; loyalty segmentation; and Bell Lager marketing.

Following a data collection process in which interviewer administered the questionnaires to chosen respondents, questionnaire transcripts were imported into SPSS. The first step of data analysis, data coding, was conducted. About 35 variable categories emerged from the data.

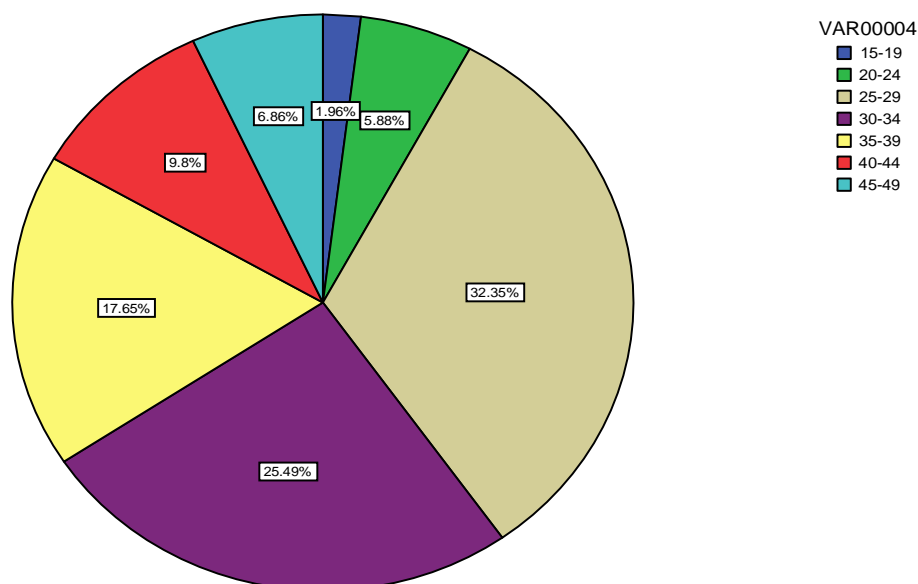
Sample Characteristics

Age Bracket by Gender: The table below highlight the results in the distribution of gender and age group.

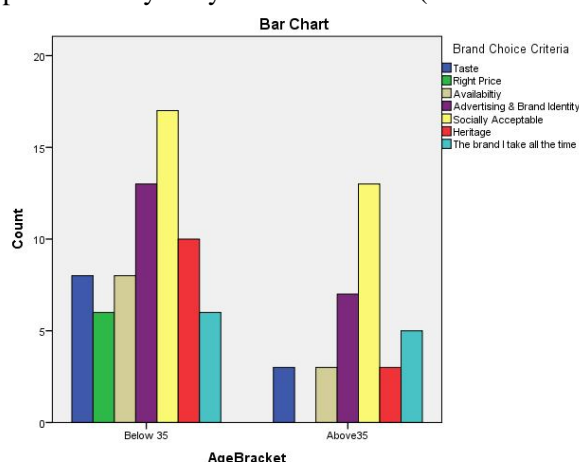
Table 4.1: Age Group by Gender

			Gender		Total
			Female	Male	
Age Bracket	Below 35 years	Count	29	33	62
		% within Age Bracket	46.8%	53.2%	100.0%
		% within Gender	82.9%	58.9%	68.1%
	Above 35 years	Count	6	23	29
		% within Age Bracket	20.7%	79.3%	100.0%
		% within Gender	17.1%	41.1%	31.9%
Total		Count	35	56	91
		% within Age Bracket	38.5%	61.5%	100.0%
		% within Gender	100.0%	100.0%	100.0%

The results in the table 4.1 showed that the majority of the respondents were male (61.5%), while there were 38.5% female respondents. The majority of females were in the under-35 years age category (82.9%); 58.9% of males fell into this category. Males dominated the above-35 year's category (79.3%). The respondents were selected based on what they were drinking, which implies that the incidence of finding men drinking Bell Lager was high, hence selection for the research. These findings are reaffirmed by Mager (2010:9), that beer drinking is not the only form of masculinity available to South African men, but because masculinity was constantly remade by men who promoted beer, drank beer and participated in the rituals of male spectator sport, a robust beer-drinking masculinity perception was created. She further elaborates that SABMiller promoted bottled beer as a lubricant of masculine sociability and built these values into brand personalities and beer advertising (Mager, 2010:9). However, in the beer industry women are also starting to take significant positions and roles, as seen in the 82.9% of women in the under-35 year's category of respondents. This increase of women in the beer industry can also be seen in a report by Taylor (2014:1), who cited Oakes Brewery, a factory in Johannesburg that is owned by women, with female brewers, who have equally noticed an increase in female customers. The beer industry may not be exclusive to men anymore.

Age Distribution**Figure 4.1 Age distribution**

The population in the study was of various ages. The majority of the respondents were aged 25 to 29 years (32.35%). The 30 to 34 year olds featured next, at a percentage of 25.49%. The 35 to 39 years group featured next at 17.65%, while the 40 to 44 years group featured modestly at 9.8%. The majority of drinkers falling in the under 30 year's age group in this study is supported by a report by the Centre for Science in the Public Interest. Gotwals, Hedlund and Hacke (2005:9) explain that the brewers rely on young drinkers to replace customers who quit, cut down on their drinking as they age, or die. Brand identification occurs early in life, and by the age of 21 many drinkers have already settled on a favourite. Brewers need to attract customers long before they reach the legal drinking age because, on average, drinkers begin consuming at age 16. This thought is taken into consideration when assessing the advertising spent during games of the National Collegiate Athletic Association, presumably to expose beer brand information to the youth. In contrast, The Nielsen Company (2015) cautions that younger beer drinkers are more apt to purchase a broader set of brands. The tendency of younger drinkers to try a broader set of brands is likely a result of their more adventurous nature, as well as the likelihood that their "favourite" products may not yet be established (The Nielsen Company, 2015:4).

**Figure 4.2 Brand choice by age group**

Chi square = 6.081, $pv = 0.414$, $df = 6$

Figure 4.2 shows reasons that motivate consumers to choose Bell Lager .Bell Lager is a socially acceptable brand for both age brackets (17% for below-35 and 13% for above-35); this score was the highest-scored reason for choosing Bell Lager beer. These findings are supported by a study done by Kuenzel and Halliday (2008:4) that reports that reputation has a strong influence on identification; hence the higher the reputation, the more customers will associate with a brand. Advertising and brand identity are important drivers for brand choice, mainly among under-35 consumers at 13%, while at 7% for 35 and above. Kim et al. (2001:195–206) explain that the attractiveness of the brand personality directly affects positive word of mouth reports and indirectly affects brand loyalty.

Brand choice motivated by heritage seems to score highly among respondents below 35 years old at 10%, while it is negligible for those of 35 and older, at 3%. Patrick Wright in Mager (2010:106) explains that commercial users of heritage lift aspects of history out of context and restage and display them as events, images and events. Thus in the commercial beer industry, heritage signified emotion, the “intangible ideas and feelings” of sociability, nostalgia and camaraderie (Mager, 2010:108). Linking the results from this study and heritage process done for beer companies like SABMiller in South Africa, we see the under-35 year’s consumers rating heritage high. Perhaps this age group is looking for belonging in their choices, with beer included in their choices.

The right price motivation scores poorly as a brand choice motivator for the under-35 years and 35 and above group. Price seems to be a barrier to choice for Bell Lager consumers. Consumers are not willing to pay. Nasirabadi and Bokaei (2013:1907–1914) elaborate that the long-term loyalty and services offered to loyal customers increase the tolerance of customers towards higher prices. This study reveals that Bell Lager has not handled its loyal consumers in a way to warrant them withstanding the high price of the brand.

Brand Choice and Origin of the beer

Table 4.2: Choice and Preference of beer according to its origins: 35 years and below

		<i>1st Choice</i>	<i>2nd Choice</i>	<i>3rd Choice</i>	<i>I don't take</i>
Ugandan beers	Count	55	13		
	% within Age Bracket	80.9%	19.1%	0.0%	0.0%
Local Brew	Count	1	12	54	1
	% within Age Bracket	1.5%	17.6%	79.4%	1.5%
International beer	Count	11	43	14	
	% within Age Bracket	16.2%	63.2%	20.6%	0.0%

Responses in Table 4.2 above reveal that the under-35 years respondents in this study rated their preference for Ugandan beers highly at 80.9%. Ugandan beers and local brew nearly have the same rating, with 13% and 12% respectively. International beers scored highly as a second choice (63.2%) and local brew took a strong position at third choice position (79.4%). The 16.2% first choice for international beers is a relatively good rating that opens up opportunities for international beers.

This study reveals positive results for international beers in contrast to the research done by Nyambura (2013:1), whose report revealed that Ugandans believe international brands are better. However, this study shows that 80% of respondents prefer Ugandan beers but have some interest for international beers. With the prospective merger anticipated between SABMiller and Anheuser-Busch InBev, knowing that SABMiller has brands in Uganda, the difference between Ugandan and international beer might be hard to distinguish.

Table 4.3: Preference of beer according to its origin: 35 years and older

		<i>1st Choice</i>	<i>2nd Choice</i>	<i>3rd Choice</i>	<i>I don't take</i>
Ugandan beers	Count	30	4		
	% within Age Bracket	88.2%	11.8%	0.0%	0.0%
Local Brew	Count	0	9	25	0
	% within Age Bracket	0.0%	26.5%	73.5%	0.0%
International beer	Count	4	21	9	
	% within Age Bracket	11.8%	61.8%	26.5%	0.0%

Chi square = 0.882 pv = 0.348 df = 1

There is no association between age and first choice of preference of beer origin. The 35 years and above respondents do not differ from the younger age group by far, but it is clear that Ugandan beers take first position, followed by international beers.

Brand Choice and Brand features

Table 4.4: Bell Lager Brand Features: Ranking for those aged 35 years and younger

		<i>Untrue</i>	<i>Slightly untrue</i>	<i>Neutral</i>	<i>Slightly true</i>	<i>True</i>	<i>Total</i>
Attractive Packaging (Label and Bottle)	Count	8	15	9	19	16	67
	% within Age Group	11.9%	22.4%	13.4%	28.4%	23.9%	100.0%
Attractive Appearance (Striking appearance, Appealing, Eye-Catching)	Count	5	10	14	15	22	66
	% within Age Group	7.6%	15.2%	21.2%	22.7%	33.3%	100.0%
Good Product Offering (Taste and Quality)	Count	14	10	12	17	12	65
	% within Age Group	21.5%	15.4%	18.5%	26.2%	18.5%	100.0%
Brand Distinctiveness (Stands out Above other beers)	Count	12	14	19	8	11	64
	% within Age Group	18.8%	21.9%	29.7%	12.5%	17.2%	100.0%
Affordable Prices	Count	29	15	12	5	4	65
	% within Age Group	44.6%	23.1%	18.5%	7.7%	6.2%	100.0%

Responses in Table 4.4 reveal the scores by consumers on given Bell Lager brand features. Consumers of 35 years and younger agreed highly on features of attractive packaging (52.3%), attractive appearance (56%) and good product offering (44.7%). Consumers disagreed on the affordability of the brand (77.7%). Brand distinctiveness was fairly scored, not strongly agreed or disagreed upon. The findings above show that affordable price is the least brand choice determinant for Bell Lager. Kim et al. (2001:195–206) explain that the attractiveness of the brand personality directly affects positive word of mouth reports and indirectly affects brand loyalty. The instrument that measured attractiveness in this study had three dimensions – attractiveness, distinctiveness, and favourableness – and these were shown to affect brand loyalty and word of mouth reports. The strength of the brand association as seen in the attractive packaging, affordable price and product offerings can positively impact customer loyalty (Kim et al., 2001:195–206). The brand features in this study are some of the factors that trigger a positive first impression of the brand to the consumer. If the first impression is good, it may continue to incite positive word of mouth, which eventually creates a wholesome, socially acceptable brand. The study's earlier findings show that social acceptability of Bell Lager is a strong reason to choose the brand.

Attractive packaging and appearance were scored highly at 52.3% and 56% respectively for respondents who agreed with these statements. This implies that the brand image of Bell Lager is strong in consumers' minds. Cant et al. (2010:238) explain that brand image perceived in consumers' minds is a result of exposure to brand cues in different elements of the promotion mix like advertising, packaging, sales promotion and pricing. Bell Lager's brand image is average because while packaging and appearance may be scored highly, the pricing of the product scored poorly thus pulling the overall brand image score lower.

Table 4.5: Bell Lager Beer Ranking among 35 years and older consumers

		<i>Untrue</i>	<i>Slightly untrue</i>	<i>Neutral</i>	<i>Slightly true</i>	<i>True</i>	<i>Total</i>
Attractive Packaging (Label and Bottle)	Count	4	8	5	10	6	33
	% within Age Group	12.1%	24.2%	15.2%	30.3%	18.2%	100.0%
Attractive Appearance (Striking appearance, Appealing, Eye-catching)	Count	7	5	4	3	14	33
	% within Age Group	21.2%	15.2%	12.1%	9.1%	42.4%	100.0%
Good Product Offering (Taste and Quality)	Count	4	3	11	11	5	33
	% within Age Group	11.8%	8.8%	32.4%	32.4%	14.7%	100.0%
Brand Distinctiveness (Stands out Above other beers)	Count	4	4	12	6	7	33
	% within Age Group	12.1%	12.1%	36.4%	18.2%	21.2%	100.0%
Affordable Prices	Count	14	13	1	4	1	33
	% within Age Group	42.4%	39.4%	3.0%	12.1%	3.0%	100.0%

In Table 4.5 above for the age group of 35 years and above, attractive appearance (51.5%) and good product offering (47.1%) were the highest scoring for Bell Lager. The affordability of the brand was strongly disagreed about, with the majority of consumers (81.8%) disagreeing with this specific brand feature. The feature of brand distinctiveness does not stand out significantly in any rating.

Brand Choice and Bell Lager Marketing

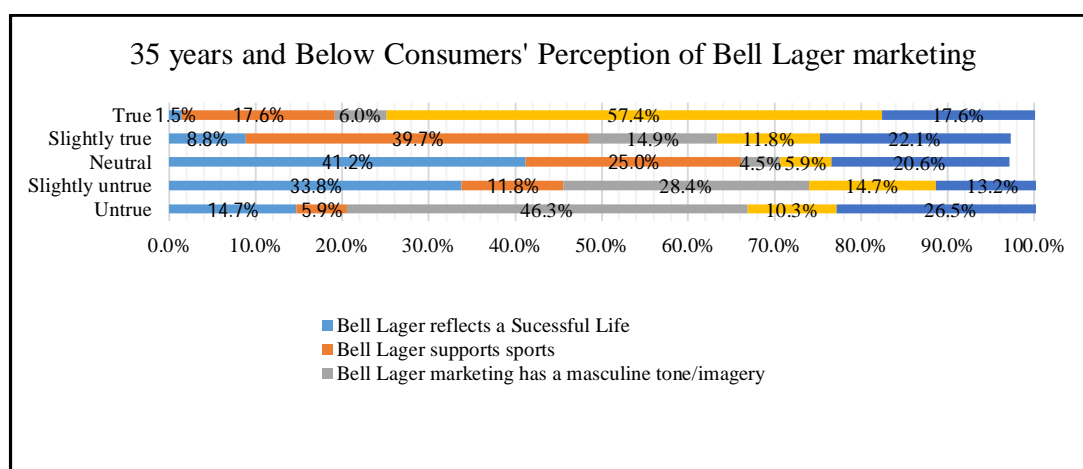


Figure 4.3: Consumer Perceptions to Bell Lager Marketing: 35 years and younger

In Figure 4.3 above the findings show that consumers strongly agree with the fact that Bell Lager supports the community (57.4%). Consumers agree somewhat that the brand supports sports (39.7%). “Bell Lager reflects a successful life”, which hints at the thematic message the brand has used over the years, sits on the fence at 41.2%, and 33.8% of consumers slightly disagree with it. Consumers of 35 years and above similarly agree with Bell Lager supporting community (50%) and Bell Lager supporting sports (26.5%). This age group disagrees with the notion that Bell Lager reflects Ugandan national pride (38.2%). The masculinity of the brand is also an element the consumers do not agree with, with an untrue score of 61.8%.

The national pride depicted for the brand for this age group stands at a balanced score with no strong or weak leanings on agreement or disagreement, which might be an opportunity for the brand to leverage on. The masculine tone of Bell Lager is largely scored as untrue. These scores disagree with research done by Wenner and Jackson (2009:164) that introduced the concept of hegemonic masculinity. If Bell Lager is scoring low on masculinity in a community that reveres masculinity, is it affecting dedicated commitment to the brand and eventually long-term loyalty?

Challenges of brand loyalty for Bell Lager

Table 4.6: Challenges of brand loyalty for consumers 35 years and above

		<i>Untrue</i>	<i>Slightly untrue</i>	<i>Neutral</i>	<i>Slightly true</i>	<i>True</i>	<i>Total</i>
High Prices	Count	2	0	6	14	12	34
	% within Age Group	5.9%	0.0%	17.6%	41.2%	35.3%	100%
Changing Tastes	Count	0	3	11	9	11	34
	% within Age Group	0.0%	8.8%	32.4%	26.5%	32.4%	100%
Introduction of new brands	Count	0	1	17	8	8	34
	% within Age Group	0.0%	2.9%	50.0%	23.5%	23.5%	100%

The table 4.6 shows a large proportion of respondents from both age groups agreeing to the fact that high prices are a challenge to brand loyalty: 50.7% of those 35 and younger in this study agree that high price is a challenge, while 35.3% of those aged 35 years and older do so. The introduction of new brands is the second challenge to Bell Lager that both age groups have agreed to; 32.4% of the 35 and older age group agree that changing tastes is also a significant challenge to Bell Lager.

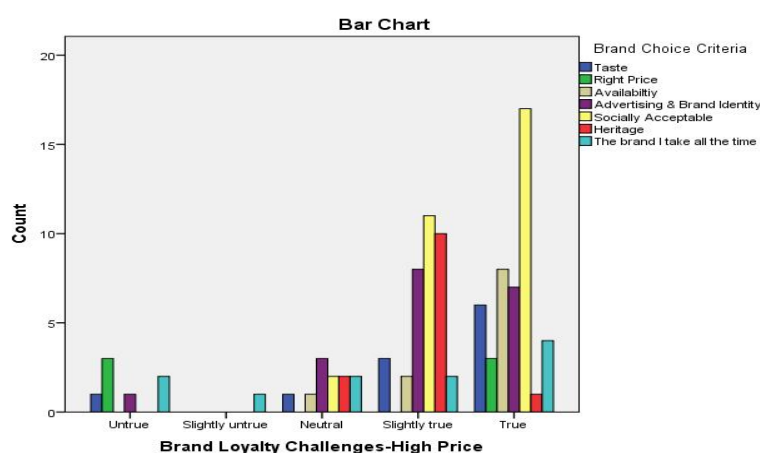


Figure 4.4: Price as a challenge versus brand choice criteria

Chi square = 50.663 pv = 0.001 df = 24

Figure 4.4 above reveals that the majority of consumers who choose Bell Lager for the socially acceptability aspect of the brand, and the advertising and availability, simultaneously agree that price is a major challenge to brand loyalty. There is a strong correlation between price, its challenges and brand choice for Bell Lager. Pricing the product so that it is affordable to the target consumer and making it available wherever those consumers may be are important parts of the marketing mix (Jernigan & O'Hara, 2004:3).

Ugandan Beer Brands' Preference

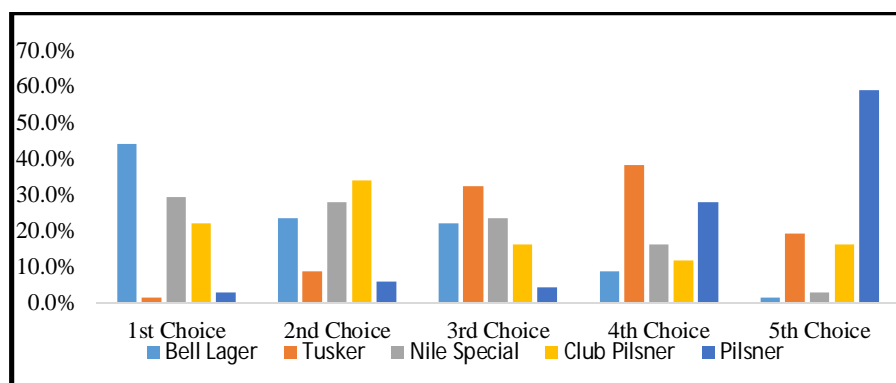


Figure 4.5: Preference Ranking for Ugandan beers for consumers aged 35 and below

The results in Figure 4.5 indicate that Bell Lager still has a significant presence as a first- choice brand among Ugandan beer brands. Bell Lager is perceived as a first choice among 44% of consumers of 35 years and below. Bell Lager as a second and third choice averages at 22%, but faces stiff competition from Club Pilsner and Nile Special (averaging 24% and 25% respectively). The first-choice brand is evidently Bell Lager for the 35 and older group. Tusker Lager serves as a strong third-choice brand for these consumers, as well as a fourth brand of choice. Pilsner Lager secures the fifth position in choice for both age groups. Bell Lager still dominates as first-choice brand among those of 35 years and older, but as a second- and third-choice brand Nile Special, Club Pilsner and Tusker Lager take prominence over Bell Lager. Pilsner Lager takes the position of the beer that would most likely be chosen as fifth beer of choice.

Bell Drinker loyalty categorisation

Table 4.7: Bell Lager Drinker Loyalty Level Categorisation

		<i>Below 35 yrs.</i>	<i>Above 35 yrs.</i>	<i>Gender: Female</i>	<i>Gender: Male</i>
Drinker Categorisation	Non-consumer	Count	1	0	0
		% within age bracket/gender	1.6%	0.0%	1.7%
	Price Switcher	Count	3	2	0
		% within age bracket/gender	4.8%	6.3%	0.0%
	Passively Loyal	Count	21	16	13
		% within age/gender	33.3%	50%	36.1%
	Fence-sitter	Count	19	5	9
		% within age bracket/gender	30.2%	15.6%	25.0%
	Committed	Count	19	9	14
		% within age bracket/gender	30.2%	28.1%	38.9%
Total	Count	63	32	36	59
	% within age bracket/gender	100.0%	100.0%	100.0%	100.0%

The drinker profile for Bell Lager drinkers using the respondents' feedback in this study shows a fairly high commitment level of 30.2% and 28.1% among under-35 and over-35 respondents respectively, with an equal split between males and females. The fence-sitters and passive loyal are high among 35 and under respondents. There are 50% of 35 and above respondents who are at fence-sitters level. In addition, 40.7% of males are at the fence-sitters loyal level. The market, as advised by David (2012:1974–1975), can be divided into non-customers (those who buy competitor brands and are not product class users), price switchers (those who are price-sensitive), passively loyal (those who buy out of habit rather than reason), fence-sitters (those who are indifferent between two or more brands), and the committed. Bell Lager needs to have different strategies relating to the different levels of loyalty of consumers.

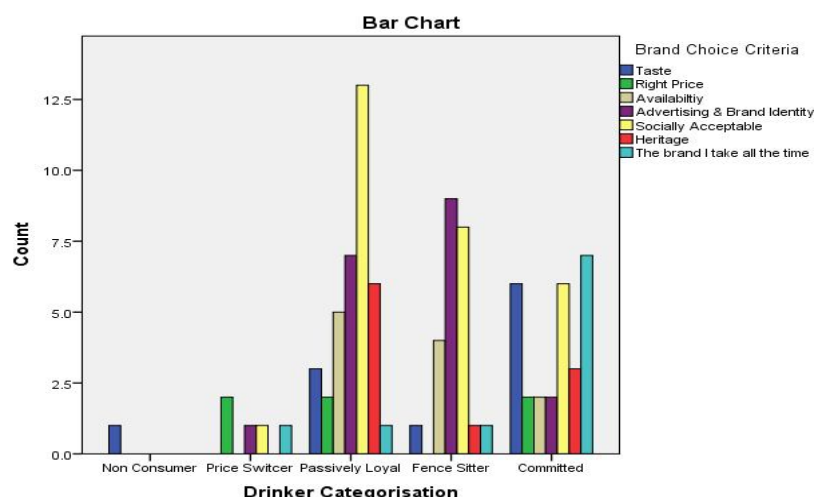


Figure 4.6: Drinker categorisation Vs brand choice motivation

Chi square = 43.33 pv = 0.009 df = 24

Figure 4.6 elaborates on the drinker profile for Bell Lager and specifies the brand choice criteria for the different categorisation bands. The brand choice motivations for each drinker category are distinct and different. The committed consumers are mainly motivated by the taste, the habit of taking the brand all the time, and the fact that the brand is socially acceptable. The fence-sitters are motivated by advertising and brand identity. The social acceptability of the brand is the highest motivation among passively loyal. Cant et al. (2010:252) support the categorisation above in order to gain insight into products' and brand's positioning. Consumer categorisation is further supported by David (2012:1974), who advises on increasing the brand's loyalty profile through reduction of price switchers, strengthening both fence-sitters and the committed.

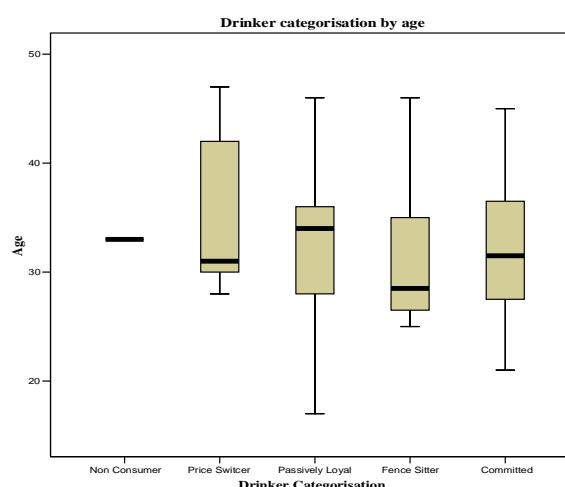


Figure 4.7 Age distribution among Bell Lager drinkers

The results from Figure 4.7 highlight the age of the consumers in their drinker categories. The bulk of committed Bell Lager drinkers are between 30 and 33 years of age. The fence-sitters and price switchers are 30 years and younger. The passive loyal consumers are older than 35 years in age. The price switchers are 31 years of age on average. The non-consumers in this study were negligible.

How can the challenges of Bell Lager loyalty be solved?

Table 4.8 Consumers' Ratings on suggested areas of improvements

Areas of improvements	Number of Respondents	Percentage of respondents who suggested improvements
Taste Improvements	32	31.4
Packaging Improvements	7	6.9
Availability Improvements	21	20.6
Advertising and Brand Identity Improvements	25	24.5
Promotions' Improvements	19	18.6
Total	104	102

Consumers suggested that the taste of the Bell Lager was the most important improvement. Taste improvement is a broad area but consumers were able to qualify what they specifically wanted changed in the recommendations below. Following taste improvement, consumers suggested advertising and brand identity improvements alongside availability improvements. Bell Lager promotions improvements were also suggested.

Recommendations on how Bell Lager brand can be improved

Consumers were able to elaborate on some of the suggestions they believe can affect Bell Lager's brand loyalty positively. On the suggestion to improve the taste of Bell Lager, consumers had the following to say:

"Bell Lager is losing the original taste", "Warm beer doesn't taste good", "Manufacturer needs to maintain the taste, sweetness and flavour of Bell", "Maintain the standards of the beer such that each bottle tastes the same throughout", "There is a bitterness as you finish the beer", and "They need to give us quality beer".

Aron (2014:1) explains that flavour instability is one of the most critical quality problems faced by the brewing industry. There is accelerated aging that takes place when beer is stored at varying temperatures above 75°F (most shelf-life is based on storage at 75°F). An increase of 10°F can result in more than two days of lost shelf life per day (Aron, 2014:2). It is known that when beer is distributed out into the market, the level of control may differ in the different beer-drinking outlets. As we see in this study, some consumers complaining about the taste, it could be an effect of the taste changing due to varying temperatures.

"Advertise aggressively in order to favourably compete", "Aggressively market the brand locally and internationally using billboards, T-shirts, media and word of mouth", and "Invest more funds in promotion and marketing by offering scholarships to excellent students".

Advertising broadly does not affect brand loyalty, but O'Guinn, Allen, Semenik and Scheinbaum (2014:22) suggest delayed-response advertising. Delayed-response advertising relies on imagery and message themes that emphasise the benefits and satisfying characteristics of a brand. This type of advertising attempts to create brand awareness and effect brand loyalty eventually (O'Guinn et al., 2014:22). Consumers are looking for more advertising from the brand, but in a bid to correct this, the type of advertising needs to be chosen carefully for sustained gains like brand loyalty.

Consumers' suggestions for improved brand availability: *"Ensure the brand is distributed even to the deepest villages all over the country", and "Distribute the brand to different locations to ensure that even the villages are supplied"*. Availability of a brand is needed for consumers to interact with it. Consumers are complaining because they cannot consistently find Bell Lager when they need it. It also seems that these are Bell Lager drinkers who cannot find their brand of choice when they travel out of their usual area.

Conclusions and Recommendations

Findings from the Study

This study investigated the challenges of brand loyalty for Bell Lager beer. The study found that there are some challenges in different areas of the brand, that present a problem in its consumers' commitment growing for the brand. There are some micro-economic issues that could also be affecting Bell Lager brand loyalty.

Findings from the Literature Review: The research findings contribute to understanding the challenges of brand loyalty in a developing world using a case study of a long-standing beer brand, Bell Lager. Brand loyalty as researched in the literature review is presented as a straightforward process that a consumer goes through, from brand awareness to a final stage of brand loyalty. The step-by-step process is not seen in this study because the environmental dynamics that the brand exists in define the speed of how loyal consumers are to the brand.

This study agrees with those by Kim, Han & Park (2001:195-206) that explain that achieving brand loyalty entails various concepts positively contributing to its ultimate achievement. These contributions include brand distinctiveness, word of mouth reports of the brand, attractiveness of the brand image, and brand personality.

This study agrees with segmenting the loyal consumers to further understand their level of loyalty towards the brand. This study was able to ascertain what loyalty levels the consumers were at, and to give the brand management the guidance on how to tackle growing loyalty of the brand.

Findings from the Primary Research: The study endeavoured to fulfil the research objectives to the best of its ability. The research sampled Bell Lager drinkers by selecting them using judgemental sampling to ensure the researcher spoke to Bell Lager drinkers. The responses that were received from the research were closely relevant to the study quest.

What are the factors that influence loyalty for Bell Lager?

In researching the reasons for choosing Bell Lager, advertising and brand identity and socially acceptability of Bell Lager were factors that scored consistently highly on the reasons for brand choice across genders and all age groups. The advertising and brand identity were specific to what the brand Bell Lager stands for. These findings agree with Kim et al. (2001: 9), that the brand identification has a positive effect on word of mouth reports, but does not have a significant direct effect on brand loyalty. However, since word of mouth reports significantly affect brand loyalty, and since brand identification significantly affects word of mouth reports, it can be said that brand identification has an indirect effect on brand loyalty through positive word of mouth reports (Kim et al., 2001:9).

Social acceptability of the brand was specific to whether other people say good things about Bell Lager. Consumers agreed widely that they choose Bell Lager because it is socially acceptable among peers and beer drinkers. This is supported by a study done by Kuenzel and Halliday (2008:5) that concluded that when consumers perceive a brand as reputable, they report a higher level of brand identification and brand loyalty. Consumers are mindful of consuming a beer

that has been endorsed by peers and other consumers. Hence positive word of mouth reports on the brand are an area which the brand should be taking seriously to ensure that the reputation of the brand is monitored.

The origin of the beer brands in the findings show that beer consumers highly favour beers made in Uganda and classified as Ugandan beers. It was found that there is a growing portion that favours international beers, while traditional unbottled alcohol was negligible in ratings. These findings highlight an opportunity for Bell Lager to emphasise the aspect that it is a Ugandan beer in the face of international brands entering the Ugandan beer market.

In relation to brand features, Bell Lager consumers agreed that the attractive packaging, attractive appearance and good product offering were strong features of the brand. The findings above show that price is the least brand choice determinant for Bell Lager.

The findings show that consumers strongly agree that Bell Lager supports community and sports. “Bell Lager reflects a successful life”, which is the thematic message the brand has used over the years does not have strong agreement from the consumers. The national pride depicted for the brand stands at a balanced score, with no strong or weak leanings to agreement or disagreement, which might be an opportunity for the brand to leverage on because consumers favoured Ugandan beers highly over other beer types.

The masculinity of Bell Lager is scored indifferently, implying that consumers don’t understand it or do not take notice of it. Beer brands worldwide have predominantly been positioned with a masculine tone. Bell Lager exists in an African setting where according to Wenner & Jackson (2009:164) masculinity is idolised and upheld, and with Bell Lager lacking a strong score on this attribute could be one of its problems.

Having reviewed all different aspects of the branding of Bell Lager, the factors that influence loyalty for Bell Lager are its brand identity, the positive word of mouth reports about the brand, the fact that it is a Ugandan beer, the attractiveness and exterior appearance of the brand and the community and sports sponsorships Bell Lager is engaged in.

What are the challenges of Bell Lager brand loyalty?

The findings show that high price of Bell Lager is the main challenge of Bell Lager loyalty. Previous studies like that of Bei and Chiao (2001:12) have concluded that perceived price fairness has positive effects on consumer loyalty directly. The Ugandan beer market is divided into premium, mainstream and value brands. Price usually defines which tier a brand will fall into. The value brands are at the bottom of the hierarchy, mainstream brands in the middle and the premium beers at the top. Bell Lager is in the mainstream tier, and the pricing would be relatively the same for beers within that tier. Hence when consumers complain about price as a barrier, it is difficult for the brand to address it realistically in a highly fluctuating market. Roberts (2015:5) supports the findings in this study by cautioning that it is getting harder to command premiums on brands since consumers have so much information. However, Bell Lager has an opportunity to direct consumers to believe that the price consumers are paying for is worth it, by raising the perceived value of the brand.

The findings also highlighted the introduction of new brands as a challenge to Bell Lager brand loyalty. A report from (BMI Research, 2014) forecasts that between 2014 and 2017, US dollar beer value sales in Uganda will grow at a compound annual rate of 21.2% to nearly US\$1bn. This is in addition to Heineken up scaling its operations in Uganda. With the latest SABMiller merger with Anheuser-Busch InBev, one cannot tell the decision of whether brands will increase or decrease in the subsidiary businesses like Uganda. With changes foreseen in the Ugandan beer market, there is anticipation even for long-standing brands like Bell Lager face on consumers’ loyalty to beer brands.

The study compared Bell Lager and four other Ugandan beers in terms of preference and found that Bell Lager is still the ultimate first-choice brand, but as a second-choice brand, Bell Lager faced stiff competition from Club Pilsner, Tusker Lager and Nile Special. Bell Lager faces strong competition from Ugandan beers. This is supported by the study results about choice criteria for Bell Lager, and the criterion of brand distinctiveness and standing out from other beers was not rated well by consumers.

It was clear from the results that the respondents did not know or could not express how different and distinct Bell Lager was from other beers. The study showed that 60% of the drinkers were in the committed and fence-sitting levels of

commitment. Most fence-sitters were below the age of 30 years. Bell Lager has 33% of its consumers who are passively loyal and are mainly male. David (2012:1974) advises on loyalty that to increase the brand's loyalty profile can be achieved through reduction of price switchers, strengthening both fence-sitters and the committed. He emphasised the need to focus on the committed segment as they are the target for competitors and are critical in seeking improvements in the brand.

How can the challenges to Bell Lager be solved?

Consumers suggested that the taste of the Bell Lager was the most important improvement. The attitude and usage report, November 2013, reported that the trial, regular consumption and weekly consumption of Bell Lager were on the decline by 10+ points.

There is competition in the Ugandan beer market, but the starting point is having a good beer; a good product for consumers. Bell Lager has a more difficult situation because it has existed since the 1950s. There are consumers older than 35 who have taken this brand for a long time and know the taste very well. Altering the taste will be noticed by some of these loyal consumers. The 35 and younger group might not have been exposed to the brand for a long time, but they have a taste profile that has been developed after exposure to more beers on the market. It is therefore pertinent for Bell Lager to choose the beer product recipe that once gave it the high market share and committed consumers and to consistently produce, sell and support that one, making Bell Lager brand authentic and true to its consumers.

The next suggested improvements were in availability and advertising and brand identity. Bell Lager's availability problem can be seen seeping through to consumers falling into the fence-sitter and passively loyal categories from the committed segment. It implies that with availability problems, consumers are choosing the next available acceptable brand, which may lead them to neglect Bell Lager in the long run.

What recommendations can be made to Bell Lager so that brand loyalty can be improved?

Consumers elaborated on the taste through their statements, but looking at the comments, the taste is a result of so many supporting systems declining. Consumers are complaining about warm beer, perhaps because of lack of refrigeration of the beer. Some of them complain that as they finish the beer, the taste is bitter. These findings are supported by Carpenter (2015), who advises that temperature has a profound effect on our taste buds. The chemical compounds that are responsible for the myriad aromas and flavours in beer are variously activated and suppressed according to temperature. Warmth usually makes a flavour more perceptible, while cold tends to suppress it; hence choosing just the right temperature ensures that these constituent chemicals remain properly in balance.

Consumers also recommended more aggressive advertising for Bell Lager to withstand the competition. De Bruijn (2011) reminds us that Bell Lager has always communicated that consumers can live life "confidently" with Bell beer. This sustained the brand growth but perhaps since the market has changed, Bell Lager needs to stand out by focusing on a unique proposition that can help the brand get into growth again. It is time to question if the consumers still need the hope message of "living life confidently" or if they are going through another phase that the brand needs to be part of. We saw in the findings that Bell Lager's distinctiveness is not strong – it's a brand like others. The message is not uniquely viewed by consumers.

Consumers rated the sports sponsorship and community activities for Bell Lager highly. This is good for the brand because it is making a connection and consumers are noticing, but consumers are not recalling the emotional messages, the intrinsic messages that matter most to keep consumers committed to the brand. Alan Clark, SABMiller's overall boss, emphasises that "People badge themselves with beer", and "It has an emotional content" (Kitwe and Onishta, 2014).

Conclusions

This study aimed to investigate the challenges facing brand loyalty of Bell Lager. In a bid to conclude this study, it is worth reflecting on the objectives of the study as recapped below.

- To examine the factors that influence loyalty for Bell Lager;

- To investigate the challenges of brand loyalty for the Bell Lager brand;
- To investigate how these challenges can be resolved; and
- To recommend ways that Bell Lager brand loyalty can be improved.

To examine the factors that influence loyalty for Bell Lager: Bell Lager has positive social approval, a position the brand has earned as a longstanding beer and this motivates consumers to choose it. The identity of the brand and its advertising play a crucial role in attracting consumers to it. Consumers notice the attractive packaging of the label and bottle. The origin of Bell Lager as a Ugandan beer is still relevant to consumers and they appreciate it as they make their beer choices. Bell Lager's support for sports and community is also noticed and appreciated by consumers, which could be contributing to loyalty to the brand.

To investigate the challenges of brand loyalty for Bell Lager brand: Bell Lager does not stand out from other beers distinctively. There is major shifting and movement of consumers from the ultimate committed level to fence-sitters and passively loyal. This shifting of consumers simultaneously implies a drop in loyalty for the brand. Bell Lager is also challenged by the international brands that exist on the beer landscape of Uganda; 16% of consumers choose international beers as first choice, in spite of the perceived high prices of international beers.

Consumers did not explain in detail some of the intrinsic values of Bell Lager, like its heritage and authenticity. This attribute is a strong factor that not many brands in Uganda can claim, but consumers lack that recognition of heritage as a major factor in their loyalty to Bell Lager. The masculinity of Bell Lager scores low among consumers, and yet beer brands worldwide and in Africa specifically has a masculine tone in advertising and positioning, which builds on the society cultural set-ups that enhance respect. If the brand cannot command respect, consumers might not want to be associated with it.

Market share performance does not work in isolation. The market share is a result of a number of systems working together and well. Bell Lager has availability gaps in the market and perceived product quality issues related to taste and the temperature of the beer. A dent in the product offering derails consumers' willingness to pay a high price for a perceived poor-quality product. Bell Lager needs to demonstrate to consumers that it is worth the price they are paying, by delivering the beer at superior-quality standards (in the bottle, the product at the point of consumption and the quality of execution of marketing activities).

Bell Lager's theme for so many years, "Bell Lager reflects my success", was not greatly agreed with by consumers. Could this be that consumers do not relate to the messaging and theme that the brand has communicated over time anymore? If this is true, Bell Lager's messaging may have a disconnect with its current consumers.

To investigate how these challenges can be resolved: Consumers suggested improvements in areas of taste, availability, promotions advertising and brand identity. The areas mentioned above received ratings between 18% and 31% – affirmations that these needed these solutions.

Recommendations

Bell Lager should continue community activities and sports sponsorship. Bell Lager can add an educational fund to assist with scholarships for tertiary education. Education as a subject is close to consumers' hearts, yet it is very expensive. Supporting education fits into the core messaging Bell Lager has run over the years: "Bell Lager shows you are successful".

Bell Lager needs to work on delivering a consistent beer to consumers. The beer quality is affected by storage factors like temperature, which are the main cause of altering beer taste. Consumers suggested increased advertising and promotions. In the consumer landscape other corporates are also advertising, like telecommunication companies, other beverages, and various service industries – hence the advertising of Bell Lager may seem insufficient, given what they are exposed to in the available media. Bell Lager needs to look for creative ways beyond the traditional, commonly used mediums to relay its brand messages and themes. Improved availability of Bell Lager on a national scale would expose

more consumers to the brand. Perhaps this is the reason some previously committed loyal consumers are dropping to passive loyal consumers.

Bell Lager, being a longstanding brand, should have the confidence to have a brand extension. This strategy may take care of the changing taste profiles for younger consumers and enhance the perception that the brand is contemporary and keeping up with consumer demands. It is equally important for Bell Lager to communicate the consistency in the beer taste so that consumers are reassured that they are taking the best product of assured quality and taste.

Bell Lager should maximise on the positive ratings of the social acceptability of the brand. The brand has a good reputation that is motivating consumers to still choose it. Bell Lager needs to increase its interaction with consumers through digital media. This is motivated by the under-35 consumers that are in the majority, as seen from this study. The digital media enhances the sharing of positive brand experience and handling the negative brand experiences and the outcome would create warm stories about the brand and growing its social acceptance among beer drinkers.

Bell Lager should utilise the opportunity presented of being a Ugandan beer. The findings in previous chapters show consumers have a great preference for Ugandan beers. Of the Ugandan beers, Bell Lager has a strong authority to remind consumers of how long it has been in the market, since the 1950s, through the “good and bad” moments and through the different generations. The heritage message may be run tactfully in the face of stiff competition, to draw emotional connections from Ugandan consumers. The “Ugandan” attribute of Bell Lager is more relevant now that SABMiller, which owns Nile Breweries Ltd, a major competitor of Bell Lager, has recently merged with a USA-based major brewery. The consequences of the merger on its Ugandan subsidiary are not yet clear. It is a great opportunity for Bell Lager to remind its current and prospective consumers of its Ugandan roots.

Bell Lager should create a new message for its advertising. The “Bell Lager makes you confident, makes you successful” theme was not a strong choice motivation for choosing Bell Lager. This shows the thematic message has outlived its purpose, and perhaps it is disconnecting with consumers. Bell Lager needs to investigate at this point in time, given the state of affairs in Uganda, what consumers want to hear, hence staying in touch with consumer connection moments.

Area(s) for further Research

This particular study explored the challenges of brand loyalty for a beer brand, Bell Lager. However, future researchers are hereby called upon to pursue the following research themes:

- An assessment of customer loyalty in the service industry setting. This could be done, for instance, in the telecommunication sector to also assess what drives choice of service provider, given the increased number of telecommunications companies in Uganda, which has consequently increased pressure on the share of wallet for an average consumer; and
- Another study should be done to examine the acceptable price point for beer brands. This is because Uganda is a highly fluctuating market in every area of the economy. The share of wallet is key in assessing how much more consumers are willing to take the price hikes, given other monetary commitments. This is because most companies are profit-motivated and would raise prices to meet their goals. However, if consumers do not increase their expenditure on beer, the volumes would go down – and so would market share eventually. It would be viable to investigate if companies can work together to fix the price for a particular period to allow the market to operate normally without price interrupting consumption

Conclusion

Brand loyalty for beer brands in Africa is limited apart from the secondary data that the beer Companies commission. However, with the global growth expectations for beer relying on Africa, there is need to have valuable market

information. Bell Lager is an authentic Ugandan beer and in spite of the market changes, this brand is symbolic to Ugandans and any effort to enhance its relevance to its consumers will go a long way to ensure it keeps its place on the shelf in the future to come.

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