

Corporate Social Responsibility and Competitive Advantage: Overcoming the Trust Barrier

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This research builds on the complementary corporate social responsibility (CSR) literatures in strategy and marketing to provide insight into the efficacy of CSR as a challenger's competitive weapon against a market leader. Through an investigation of a real-world CSR initiative, we show that the challenger can reap superior business returns (i.e., more positive attitudinal and behavioral outcomes) among consumers who had participated in its CSR initiative, relative to those who were merely aware of the initiative. Specifically, participant consumers demonstrate the desired attitudinal and behavioral changes in favor of the challenger, regardless of their affective trust in the leader, whereas aware consumers' reactions become less favorable as their affective trust in the leader increases. Furthermore, participant consumers, but not aware ones, form a communal, trust-based bond with the challenger.

Key words: corporate social responsibility; competitive strategy; challenger brand; affective trust

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Introduction

Today, corporate social responsibility (CSR), a firm's commitment to maximize long-term economic, societal, and environmental well-being through business practices, policies, and resources, is a strategic imperative. Spurred by the thinking of leading strategy, management, and marketing scholars (e.g., Kotler and Lee 2005, Raghuram et al. 2010, Mahoney et al. 2009, Margolis and Walsh 2003, Porter and Kramer 2006), most forward-thinking firms across the globe are approaching CSR as not merely their ethical responsibility to society and the environment, but instead as a way to achieve their strategic objectives while at the same time bettering the world (i.e., creating joint value for the firm and society). In line with this emerging perspective, more and more companies are engaging in initiatives that try to improve public health, safety, the environment or community well-being through the active participation of key stakeholder groups such as consumers. Kotler and Lee (2005) call such initiatives corporate social marketing initiatives, labeling them "best of breed" among alternative corporate social initiatives in terms of their ability to improve consumer well-being while at the same time helping achieve strategic goals such as market development and increased sales. For

example, the personal care brand Dove, in partnership with the Girl Scouts, has an initiative aimed at a critical social issue facing its consumers and their families: pervasive low self-esteem among adolescent and preadolescent girls, with accompanying risky behaviors such as smoking, eating disorders, and suicidal tendencies (Unilever 2010, Girl Scouts 2010). This program, which comprises age-appropriate curricula and workshops that inspire girls (also Dove consumers) to embrace a wider definition of beauty, build a strong sense of self, and take care of their bodies and minds, has greatly boosted the popularity and sales of Dove products (Cone and Darigan 2010).

An important strategic objective for many firms/brands¹ is to gain a competitive advantage over their often formidable rivals. Thus, it is not surprising that a recent large-scale study of chief financial officers, investment professionals, and CSR managers (*McKinsey Quarterly* 2009) revealed that "strengthening competitive position" is a key impetus for firms to engage in strategic CSR. Yet, even as the debate on CSR has shifted decisively from "whether" to

¹ CSR actions can be at the company level, brand level, or both; in this paper we use company and brand interchangeably to capture the range of company-brand relationships (i.e., from corporate brands to standalone brands/individual brands).

“how” (Smith 2003), there exists little conceptual clarity regarding when, how, and why firms might be able to achieve their strategic goals, such as gaining a competitive advantage, through their CSR actions. This is due in part to the disparate perspectives the different disciplines have brought to their examination of strategic CSR. Researchers in management (encompassing strategy and organizational behavior) have typically focused on macro- and mesolevel issues such as the link between CSR and firm financial performance (e.g., Godfrey et al. 2009, Margolis and Walsh 2003), finding such a link to be positive but equivocal. In contrast, marketing researchers have adopted a markedly microlevel perspective to understand when, why, and how consumers respond positively to CSR, engaging in probrand behaviors (e.g., Du et al. 2008, Sen and Bhattacharya 2001). Consequently, although the notion that CSR can lead to competitive advantage is implicit to current thought in management, there is scant insight into the actual consumer-level dynamics underlying a company’s ability to use CSR as a strategic competitive lever. Conversely, whereas marketing has focused on the when, why, and how of customer reactions, extant CSR work in this discipline has focused on single-firm/brand contexts (e.g., Sen et al. 2006, Simmons and Becker-Olsen 2006), neglecting the role of competition in the strategic returns to CSR.

This paper aims to understand the conditions under which a brand’s CSR actions can serve as effective instruments of competitive strategy, helping it compete with a formidable market leader. A basic premise of this research is that the success of such a macrolevel strategic objective depends, ultimately, on the microlevel actions of individual consumers. Thus, we take an individual-level consumer psychology perspective to investigate the efficacy of an actual, real-world CSR initiative in helping a brand strengthen its competitive position. In doing so, this research attempts to span, integratively, the disparate perspectives on CSR, ranging from strategy (i.e., management) to consumer behavior (i.e., marketing).

The results of a qualitative focus group study and a field survey involving the target consumers of a challenger’s CSR initiative reveal that its efficacy in helping the challenger gain customers from the market leader (i.e., its primary competitor) hinges, interactively, on two key factors: consumers’ participation in (versus awareness of) the initiative and their affective trust in both the challenger (i.e., their perceptions of the company’s care and concern for its consumers) and the leader. These findings contribute to the literatures of marketing, strategy, and CSR in several ways. First, they demonstrate more favorable attitudinal and behavioral outcomes among consumers who have participated in and tangibly

benefitted from a brand’s CSR initiative relative to those who are merely aware of the initiative.² This finding comprises the first microlevel empirical affirmation for the notion of strategic CSR articulated by both marketing (e.g., Kotler and Lee 2005) and strategy (e.g., Porter and Kramer 2006) scholars; the strategic superiority of a program that requires consumer participation (e.g., a corporate social marketing initiative) stems from not only participant consumers’ universally positive reactions regardless of their existing loyalty to a competitor, but also their transformed, trust-based relationship with the brand.

Second, we show that the reactions of aware consumers to a brand’s CSR initiative can range in favorability depending on the strength of their existing relationship with its competitor. This finding underscores the critical influence of the competitive dynamics in the marketplace, a factor largely neglected in the extant CSR research. At the same time, our research contributes to the persuasion literature (e.g., Ahluwalia 2000) by demonstrating that direct participation in a CSR initiative, if a positive experience, can overcome the biasing influence of strong attitudes (i.e., those toward the leader) in consumers’ processing of counterattitudinal information (i.e., favorable CSR information about the challenger).

Third, our findings highlight the pivotal but thus far unexamined role of affective brand trust at the individual consumer level in driving the strategic returns to CSR. Our findings show that participation in a challenger’s CSR initiative is associated with greater affective trust in the challenger (ATC), and consequently, brand ambassadorship. As well, we show that affective trust in the rival market leader (ATL) captures, importantly, the strength of the consumer–leader relationship, representing the competitive barrier the challenger must overcome to win consumers over from the leader. In other words, we add to the strategy and marketing literatures by identifying trust in the focal brand’s competitor as a moderator of CSR’s efficacy as an instrument of competition.

Finally, our research demonstrates that through CSR programs that entail consumer participation, a challenger brand can go beyond the standard marketing mix to appeal directly to consumers’ hearts, thus reshaping the competitive game with the leader. This finding is significant in light of the extant literature on the pioneer/leader versus challenger competition,

² We distinguish between three groups: participant consumers (i.e., those who have participated in a brand’s CSR initiative), aware consumers (i.e., those who are merely aware of, yet have *not* participated in, the brand’s CSR initiative), and unaware consumers (i.e., those who have not participated in and are unaware of the brand’s CSR initiative). Note that although participant consumers are also aware of the initiative, they are not included in the aware group.

which suggests that the challenger is at a significant disadvantage if it chooses to compete against a leader on marketing mix variables (e.g., product attributes, price; Bowman and Gatignon 1996).

The rest of this paper is organized as follows. We first describe the empirical context of our research. We then report two studies, a qualitative one that, together with relevant literatures, informs our conceptualization about consumer reactions to a brand's CSR initiative in a competitive marketplace and a quantitative field study to test our predictions. We end with a discussion of the implications of our findings for theory and practice, as well as areas of future research.

Empirical Context: A Corporate Oral Health Initiative

A strategic approach to CSR requires a company to address social issues that intersect with its particular business, such as important concerns of its consumers (Kotler and Lee 2005, Porter and Kramer 2006). For producers of oral care products, a relevant, serious social issue facing many of their consumers is the existence of "a silent epidemic": widespread dental and oral diseases in disadvantaged communities, especially among children of minority racial/ethnic groups (Fisher-Owens et al. 2008, Lewit and Kerrebrock 1998, U.S. Department of Health and Human Services 2000). Oral diseases cause significant pain, poor appearance, and valuable time lost from school (e.g., more than 51 million school hours are lost every year because of illnesses related to oral health; Center for Disease Control and Prevention 2009)—problems that can greatly diminish a child's self-image, welfare, and chances of future success. The Surgeon General's report, *Oral Health in America* (U.S. Department of Health and Human Services 2000), in 2000 explicitly called upon different sectors such as private industry, nonprofit organizations, and health professionals to take action to solve this public health issue.

As an answer to this call for action, a major brand of oral care products launched a national outreach program in the year 2000 that, in partnership with the Boys and Girls Club of America (BGCA), the American Dental Association, and dental schools across the country, provides oral health education and dental care tools and services to children and their families in economically disadvantaged communities nationwide (Kotler and Lee 2004).³ At the core of this initiative is a four million dollar per year oral health program created in partnership with BGCA, a national network of 3,300 neighborhood-based recreational/educational facilities (called clubs)

for economically disadvantaged children. The oral health program has an age-appropriate oral hygiene curriculum in which participants learn about proper oral health through videos, audio tapes, a website, and interactive lesson plans. All participating children also receive oral care tools (e.g., toothbrushes, toothpaste, and dental floss) and parent brochures to take home. In addition, the oral care brand has built full-service dental clinics in select BGCA clubs across the country to provide low-cost oral care, including screening and treatment.

Notably, we learned from our initial interviews with brand managers that a key business objective of this initiative was to gain a foothold in the U.S. Hispanic market, which, although an important strategic market segment because of their large size and rapid growth, was overwhelmingly loyal to the brand's primary competitor, the market leader. In other words, in addition to the social goal of addressing a critical public health problem facing its consumers, this initiative also had the strategic business goal of gaining consumers from the market leader.

Qualitative Study

Method

Design. We conducted six focus groups (8–10 respondents each) in three different urban areas with large Hispanic populations. We did two focus groups in each area, one with parents of Hispanic children that had participated in the oral health initiative (i.e., participant consumers) and one with parents of Hispanic children that had not participated (i.e., non-participant consumers). We focused on parents for three related reasons. First, this was consistent with our conceptualization of the program participant as the family rather than just the children (Lackman and Lanassa 1993). The program relied on the physical and psychological participation of not just the children but the parents as well (e.g., it was the parents who enrolled their children in the program). In that sense, program participation, like many other conventional consumption activities, was engaged in not individually but as a group. Second, parents are more able to evaluate the efficacy of the program in terms of changes in their children's oral health behaviors and psychosocial well-being. Third, parents are the primary decision makers and purchasers of oral care products, and hence are in the best position to talk about their beliefs of oral care brands. Finally, we chose to focus on Hispanic consumers because Hispanics are one of the primary targets of this program (another primary target being African Americans), and because the Hispanic market segment is of particular strategic value to the challenger.

³ Here we describe the social initiative as it was at the time when this research was conducted. The initiative has evolved since then.

Participant consumers were screened on the following criteria: (1) self-identified Hispanic race, (2) 18 to 45 year old, (3) has a child or children who have either completed or are close to completing the oral care program, and (4) is the primary caretaker of the child(ren) and the decision maker for their out-of-school activities. Nonparticipants consisted of Hispanic parents from the same neighborhoods whose children had not participated (i.e., none of the children had ever participated) in the program. Only four focus group participants were male; the rest were female. Each was paid \$100 for his/her participation.

Procedure. The focus groups were conducted in Spanish by a Hispanic moderator from a qualitative research company that specializes in Hispanic communities. The moderator began with general questions about the level and importance of oral hygiene in their families. Then respondents talked about their purchase behaviors and beliefs of oral care products, mostly toothpaste and toothbrushes. Not surprisingly, the brand behind the oral health initiative and its major competitor (i.e., the challenger and the leader) emerged as the predominant brands used by nearly all respondents. Respondents then did a brand imagery exercise describing these two brands as if they were human beings. Finally, respondents talked about the challenger's oral health initiative. Because of the nonparticipant consumers' low awareness of the program (only two had heard of it), this group watched a short video about the program before talking about their reactions. All focus group discussions were videotaped, translated into English, and transcribed.

NVivo, a leading software for qualitative data analysis, was used to code, manage, and explore the transcripts. Analysis followed an iterative approach, traveling back and forth between the data and the emerging theory (Eisenhardt 1989). We judged the trustworthiness of focus group findings by triangulation of multiple quotes from participants in different focus groups and interpreted these findings in light of relevant literatures.

Findings

Competitive Status: Challenger vs. Leader Brand. Consistent with the information provided by the challenger's brand managers, the focus group discussion revealed that its key competitor is the incumbent brand and leader in the U.S. Hispanic market.⁴ The

leader's dominance derives primarily from the fact that it entered most Hispanic markets before the challenger and has remained very popular in these markets ever since. Consequently, even after migration to the United States, the focal Hispanic consumers continue to use the brand they have grown up with. As both participant and nonparticipant consumers commented: "In Mexico, the most popular toothpaste is [the leader]. That is what we are used to." And, "I remember that years ago in Monterrey the first toothpaste that came out was [the leader] and years later [the challenger] came out. People were afraid to change; you got accustomed to [the leader]."

Reactions of Participant Consumers. One prominent finding from the focus group discussions is that participation in the challenger's initiative was associated with greater consumer trust in the challenger. When asked to describe the two brands as if they were human beings, an exercise intended to reveal consumers' brand associations, nonparticipant consumers, largely unaware of the initiative, described the challenger as "feminine," "gentle," "younger," and "not as famous as the leader," and the leader as "masculine," "strong," "professional," "aggressive," "experienced," and "successful." Participant consumers shared many of these brand associations but, importantly, also described the challenger as "caring," "trustworthy," "angelical," and "Latino" ("it is one of us"). Notably, these descriptors brought up only by participant consumers reflected their greater ATC—associations pertaining to how much the challenger cares about consumers' welfare (Chua et al. 2008, Doney and Cannon 1997, McAllister 1995). On the other hand, participant consumers still shared nonparticipant consumers' associations relating to the challenger's expertise and capability (i.e., cognitive trust; Doney and Cannon 1997, McAllister 1995), as indicated by descriptors of the challenger "younger," and "not as famous," and those of the leader "professional," "experienced," and "successful." Collectively, the group comparison revealed differences in ATC but not cognitive trust in the challenger.

Furthermore, in the social psychology literature, trustworthiness (i.e., a person's likelihood to make good faith contributions to benefit the collective well-being of a relationship, a notion similar to affective trust in the marketing literature) has been shown to be the single most important characteristic for ideal members of interdependent groups (e.g., work teams) and relationships (e.g., friends, family members; Cottrell et al. 2007, Rempel et al. 1985). To further assess changes in participant consumers' ATC, we asked a series of choice questions on the challenger's and the leader's suitability for several interdependent social relations (i.e., whom they would choose to be friends with, whom they would leave

⁴Of oral care products, we chose to focus only on toothpaste because the focus group discussions revealed that, interestingly, consumers are brand conscious with regard to toothpaste but not toothbrushes. When purchasing toothbrushes, respondents said they often use criteria other than brand, such as the size, shape, or texture of bristle, and whether the toothbrush is on sale.

their children with, and whom they would choose as a business partner). Consistent with their greater ATC, most participant consumers chose the challenger; whereas most nonparticipant consumers chose the leader in these scenarios. Together, these differences between participant and nonparticipant consumers suggest that participation in the initiative was associated with greater ATC as well as greater willingness to enter into a communal, interdependent relationship with the challenger. In the words of one participant consumer, “They worry about us. Economically it is expensive but they give it for free. You invest in a company but the company is also serving you.”

This finding that participation in the challenger’s initiative was associated with greater ATC but not cognitive trust is in line with the trust literature, which distinguishes between affective and cognitive trust and has identified distinct antecedents to these two types of trust. Whereas cognitive trust, pertaining to a brand’s perceived expertise and capability, will likely be driven by calculative and instrumental assessments such as product performance, firm size, and market position (Chua et al. 2008, Doney and Cannon 1997, McAllister 1995), affective trust, pertaining to beliefs of how much a brand is genuinely interested in consumers’ welfare, will likely be driven by behaviors that indicate care and concern for the consumers, such as CSR initiatives. Furthermore, cognitive trust is short term and exchange oriented in nature, whereas affective trust fosters communal and long-term relationships (Chua et al. 2008, McAllister 1995, Rousseau et al. 1999).

In addition to participant consumers’ greater ATC relative to nonparticipant consumers, there were clear group differences in the pro-challenger behaviors. For instance, whereas only a few of the nonparticipant consumers said they ever bought the challenger’s toothpaste, roughly 50% of the participant consumers reported buying it frequently. Also importantly, participant consumers mentioned that because “it is a company that helps the community,” they had supported or would support the challenger through not just purchase but also a broader set of behaviors such as recommending the brand to friends, talking about the oral health initiative, and volunteering for the brand.

Reactions of Aware Consumers: The Moderating Role of Affective Trust in the Leader. Because only two consumers in our nonparticipant focus groups had heard of the challenger’s initiative,⁵ we created

awareness by showing all nonparticipants a five-minute video of the initiative. Interestingly, unlike participant consumers, who seemed to have universally embraced the initiative, the reactions of the aware consumers to the initiative varied dramatically with the strength of their extant relationship with the leader. Although most aware consumers purchased the leader frequently, the focus groups revealed that their relationship with the leader ranged from a passive inertia to a strong affective bond. Aware consumers who were not strongly attached to the leader eagerly embraced the CSR initiative and applauded the challenger’s efforts to help their community. For instance, one aware consumer who always patronized the leader because “I’m used to it,” commented, “I have bought [the challenger] before because my son likes the taste and packaging but I hadn’t given it much thought. Now I think I am even going to buy it for myself. I have never seen [the leader] do something like this to help kids.”

In contrast, aware consumers who were emotionally attached to the leader tended to resist the initiative, with some questioning the sincerity of the challenger’s motives, and others arguing that the leader provided similar benefits to the community. One aware consumer who described the leader as trustworthy (i.e., “supportive and warmhearted”) was suspicious of the challenger’s motive: “They [the challenger] help the community to make a name for themselves and to gain popularity.” Another aware consumer defended the leader thus: “[The leader] has lots of health fairs. They had vans with doctors providing free checkups and they also gave information about clinics where you could get treatment.”

This pattern of reactions is not entirely surprising in light of research in the consumer psychology literature that documents resistance to counterattitudinal information among individuals with strongly held attitudes (Ahluwalia 2000, Ahluwalia et al. 2000, Eagly and Chaiken 1995). For example, Ahluwalia et al. (2000) find that consumers’ commitment toward a brand moderates their response to negative publicity in that high-commitment consumers actively counterargue against negative information and resist attitude change, whereas low-commitment consumers process the negative information objectively. It is worth noting, however, that in contrast to prior research, which examines consumer reactions to negative information about a focal brand (e.g., Ahluwalia et al. 2000), our respondents display similar resistance to even positive information about a competing brand. In other words, ATL emerged from the focus groups to be the key attitudinal variable affecting aware consumers’ reactions to the challenger’s initiative. Aware consumers with high ATL tried to

⁵ The two aware consumers cited reasons such as “[the BGCA club] is far away from where we live,” and “I don’t have time to take the kids to the program” for not participating in the program.

discount the challenger's initiative (e.g., inferring self-serving motives, such as "to make a name for themselves"), whereas those with low ATL seemed to process the information in a more objective manner, viewing the initiative as an indicator of the challenger's trustworthiness (e.g., inferring more intrinsic motives, such as "this means they [the challenger] care about our welfare and want us to get ahead"). Not surprisingly then, aware consumers with low ATL exhibited greater attitudinal and behavioral change in favor of the challenger (e.g., "I am going to buy it") compared to those with high ATL. This moderating effect of ATL points to the power of strong consumer-brand relationships in warding off competitive attacks (Fournier 1998); from the challenger's perspective, ATL signifies the competitive barrier that the brand needs to overcome in gaining favor with the aware consumers.

Perhaps the most intriguing finding from the focus groups is that, contrary to what the extant literature on persuasion resistance and relationship marketing (Ahluwalia et al. 2000, Fournier 1998) might predict, ATL does not seem to moderate the reactions of participant consumers; they all display similar changes in their pro-challenger attitudes and behaviors, regardless of their ATL. That direct participation in the challenger's initiative is associated with universally favorable reactions regardless of consumers' ATL can be explained by two factors. First, high perceived impact of the initiative provided participants with convincing and difficult-to-refute evidence of the challenger's concern for consumer welfare, making biased processing (e.g., counterarguments) of the information difficult (Ahluwalia 2000). Specifically, beliefs regarding initiative efficacy were pervasive among participants: respondents noted not only greater oral care behavior by their children (e.g., "I don't have to tell them so much to brush their teeth anymore; and besides, they have learned how to floss really well"), but also their children's enhanced physical (i.e., dental health) and psychosocial (i.e., confidence, self-esteem) well-being. (For example, "I see that the program is doing an excellent job with them. My kids have more confidence, they feel good. It's good to see these changes.") In other words, the tangible benefits participant families obtained from the initiative seemed to convince them that it was not some superficial marketing ploy, but instead reflected the challenger's genuine care and concern for the community's welfare (e.g., "the company helps a lot; they want to help the lower income people"; "they worry about us"). Interestingly, participants also grasped the concomitant business motives (e.g., "It's a form of marketing not only to get their products out but also to help the community"), but were able to reconcile

these with the genuine concern motives, commenting that it was a win-win situation (Ellen et al. 2006).

Second, research on direct experience (e.g., Hoch and Deighton 1989) suggests that participation in the initiative is likely to trigger more elaborate internal rehearsal and central processing of information pertaining to the initiative, resulting in pro-challenger judgments that are perceived to be valid and credible, and hence held with confidence despite the potentially biasing influence of consumers' existing loyalty to the leader. More formally, we hypothesize the following:

HYPOTHESIS 1 (H1). *In terms of ATC, (a) participant consumers will have greater ATC than unaware consumers, and this difference will not vary with consumers' ATL, and (b) aware consumers will have greater ATC than unaware consumers, and this difference will decrease as consumers' ATL increases.*

HYPOTHESIS 2 (H2). *In terms of pro-challenger behaviors, (a) participant consumers will have more favorable pro-challenger behaviors than unaware consumers, and this difference will not vary with consumers' ATL, and (b) aware consumers will have more favorable pro-challenger behaviors than unaware consumers, and this difference will decrease as consumers' ATL increases.*

The Role of ATC in Driving Pro-challenger Behaviors. A final theme that emerged from the focus groups pertains to the driving role of ATC in the participant consumers' pro-challenger behaviors. Specifically, participant consumers spontaneously pointed to the role of ATC in their decision to purchase and support the challenger (i.e., "They are working on not the immediate but long term results...they give us the trust to continue using their products"). In other words, participant consumers seemed to have formed a communal, trust-based relationship with the challenger wherein both parties care for each other and take on the other's problems as their own (Chua et al. 2008, Rousseau et al. 1999). As one participant consumer stated, "It helps you be more decisive when you see that a company does something for the community. ...Why would I not buy it?" In line with their greater ATC and the communal nature of their relationship with the challenger, participant consumers went beyond just purchasing the brand to engage in a range of championing behaviors toward the challenger such as recommending the brand to others and volunteering for it. In contrast, such mutuality and consequent championing behaviors were less noticeable among aware consumers. Unlike participant consumers who pinpointed ATC to be the primary driving force behind their pro-challenger behaviors, aware consumers seemed to adopt a more calculative, transactional mindset, citing product quality (e.g., "because

it [the challenger] leaves a fresh breath"; "it is recommended by dentists"), along with ATC, as inputs into their reactions to the challenger. These differences point to the qualitatively distinct drivers of the consumer–challenger relationship among the participant versus aware consumers. Specifically, research on relationship marketing suggests that although strong, long-term-oriented relationships are driven by trust, and weak, short-term-oriented relationships are driven by transaction-specific satisfaction (e.g., product performance and price; Agustin and Singh 2005, Garbarino and Johnson 1999, Morgan and Hunt 1994). Moreover, trust fulfills the higher-order social needs intrinsic in strong, relational exchanges, whereas satisfaction fulfills only the lower-order, economic needs in transactional exchanges (Agustin and Singh 2005).

This driving role of ATC in participant (but not those merely aware) consumers' pro-challenger behaviors can also be understood in terms of attitudes based on direct experience (Fazio and Zanna 1981). ATC formed through participation in the challenger's initiative is likely to be more accessible, more persistent over time, and importantly, more likely to guide later behavior than ATC based on learning about the initiative through a second-hand, indirect source (i.e., mere awareness). In other words, it is the greater salience, or accessibility, of ATC among the participant consumers that determines, at least in part, its greater impact on their pro-challenger behaviors. In sum, we hypothesize the following:

HYPOTHESIS 3 (H3). *Participant consumers, but not merely aware consumers, will demonstrate a stronger link between ATC and pro-challenger behaviors than unaware consumers.*

Next, we test our predictions through a field study involving the same CSR initiative.

Field Study

Method

Design. Given that the challenger's initiative was already in place at the time of this study, we employed a quasi-experiment design: post-test only with a nonequivalent control group (Shadish et al. 2002). More specifically, our field study has three groups: participant, (merely) aware, and unaware consumers. Participant consumers consisted of Hispanic parents whose children had either completed or were close to completing the oral health program. Nonparticipant consumers consisted of Hispanic parents from the same zip codes but whose children had not participated in the program (i.e., none of the children had ever participated) and were further divided into aware consumers and unaware consumers based on whether they were aware of the initiative prior to the survey. The unaware consumers served as a control

group. We estimate the effects of participation in (awareness of) the challenger's initiative by comparing participant (aware) consumers to unaware consumers. Because the field setting of our experiment did not allow for randomization, it is possible that these three groups are not equivalent, an issue we attempt to address through analysis. We used a telephone survey administered by an independent marketing research company.

Respondents. We recruited participant consumers from six urban areas where the program was active using the same criteria used to recruit the focus group participants. We got telephone contact information of 345 Hispanic families that satisfied our recruitment criteria from the nonprofit organization (BGCA). Care was taken to exclude all focus group participants. To motivate participation, those who completed the survey were automatically entered into two random drawings for \$100. However, even after several attempts to contact members of this sample, we were unable to reach a majority of the participant consumers. Reasons for this included invalid phone numbers, busy phone lines, calls that were unanswered or forwarded to the answering machine or voice mail, and respondents not being available to complete the survey. Our experience in accessing our sample is similar to that of prior research, which documents the various difficulties in surveying ethnic and minority groups, especially those with low literacy and low socioeconomic status, such as the participant consumers in our study (Word 1997). We ultimately reached 140 participant consumers, yielding 53 complete surveys. Given the low response rate (15%), we compared the early respondents ($n = 42$) to the late ones (i.e., those who were reached after repeated contact attempts, $n = 11$) and found that they shared similar sociodemographic profiles as well as similar beliefs of and behaviors toward the challenger and the leader, allaying at least somewhat our concerns about nonresponse bias.

One thousand nonparticipant consumers were contacted from lists drawn from the marketing research company's database. We obtained 305 complete surveys (i.e., a 30.5% response rate). Prior to the analyses, we deleted all observations with missing values on the key measures, resulting in a total sample size of 316, with 47 participant consumers and 269 nonparticipant consumers. In line with prior evidence of low CSR awareness (Alsop 2005, Du et al. 2007, Sen et al. 2006), we found that only 36 of the 269 nonparticipant consumers were aware of the challenger's initiative, yielding 36 aware consumers and 233 unaware consumers. Table 1 provides the sociodemographic characteristics of these three groups. Although aware consumers are not meaningfully different from unaware consumers, participant

Table 1 Sample Characteristics

	Participant consumers (n = 47) (%)	Aware consumers (n = 36) (%)	Unaware consumers (n = 233) (%)
Marital status			
Single	23.4	5.6	9.9
Married/Living together	63.8	72.2	77.7
Widowed, divorced, or separated	12.8	22.2	12.4
Employment status			
Work full time	55.3	41.7	40.8
Work part time	6.4	11.1	17.2
Unemployed or student	38.3	47.1	42.0
Education			
Some or finished grade school	19.6	33.4	22.0
Some or finished high school	71.8	36.1	48.5
Some college or higher	8.6	30.5	29.5
Household income			
Under \$30,000	76.6	55.5	58.4
\$30,000–\$49,999	19.2	22.3	23.6
\$50,000 and over	4.2	22.2	18.0

consumers are more likely to be single, work full time, and have lower levels of education and household income than unaware consumers, which to an extent explains the lower response rate among the participant consumers (i.e., they were at work and hence unavailable to respond to the survey call). To control for these differences, we included these sociodemographic variables as covariates in all our analyses.

Measures. Two dummy variables were used to denote the three test groups: $D1 = 1$ if the respondent is a participant consumer, and $D1 = 0$ otherwise; and $D2 = 1$ if the respondent is an aware consumer, and $D2 = 0$ otherwise. Unaware consumers are denoted by $D1 = 0$ and $D2 = 0$. Our other measures were developed based on prior research as well as our qualitative findings (see the appendix for details, including descriptive statistics). Prochallenger behaviors were assessed through three distinct types of behavior: purchase of the challenger ($Purchase_C$), likelihood to recommend the challenger ($Recommend_C$), and resilience to negative publicity about the challenger ($Resilience_C$). These behaviors are in line with prior research on relationship marketing, which lists purchase (Agustin and Singh 2005, Garbarino and Johnson 1999, Morgan and Hunt 1994), recommending the brand (Reichheld 2003, Sirdeshmukh et al. 2002), and resilience to negative brand information (Ahluwalia et al. 2000, Bhattacharya and Sen 2003, Fournier 1998) as key indicators of consumer loyalty and championship behaviors.

ATC (ATL) was measured by two items that tap into consumer perceptions of the challenger's (leader's)

Table 2 Means and Standard Deviations of Key Variables by Groups

	Participant consumers (n = 47)	Aware consumers (n = 36)	Unaware consumers (n = 233)
<i>Perceived impact of initiative</i>	4.45 (0.58)	—	—
<i>Intrinsic attributions</i>	4.49 (0.55)	4.06 (0.75)	3.95 (0.86)
<i>Extrinsic attributions</i>	3.23 (1.31)	3.53 (1.11)	3.32 (1.06)
<i>ATC</i>	4.26 (0.64)	4.00 (0.88)	3.64 (0.85)
<i>PQC</i>	4.03 (0.83)	4.18 (0.67)	3.76 (0.80)
<i>Purchase_C</i>	3.21 (1.16)	3.11 (0.98)	2.70 (1.20)
<i>Recommend_C</i>	3.68 (0.91)	3.28 (0.97)	2.64 (1.30)
<i>Resilience_C</i>	3.11 (1.27)	2.81 (1.43)	2.55 (1.28)
<i>ATL</i>	4.00 (0.85)	4.11 (0.90)	3.93 (0.82)
<i>PQL</i>	4.02 (0.83)	4.23 (0.97)	4.10 (0.77)
<i>Purchase_L</i>	3.51 (1.12)	3.78 (1.12)	3.89 (1.18)
<i>Recommend_L</i>	3.53 (0.78)	3.47 (0.99)	3.32 (1.23)
<i>Resilience_L</i>	2.81 (1.21)	2.86 (1.36)	2.93 (1.23)

genuine care and concern for their welfare (Agustin and Singh 2005, Chua et al. 2008, Johnson and Grayson 2005). In addition, we measured perceived quality of the challenger (PQC) and the leader (PQL) in terms of the perceived efficacy of each brand on three key product attributes that emerged from the focus groups: freshening breath, whitening teeth, and fighting cavities. The attribute of fighting cavities was measured using a reversed item and was dropped from our analysis because of its low correlation with the other two items. Finally, we collected measures pertaining to the challenger's initiative, including perceived impact of the initiative (for participant consumers only) and perceived intrinsic and extrinsic CSR motives (Ellen et al. 2006). Nonparticipant consumers were asked whether they were aware of the challenger's initiative before these questions; in case they were unaware, a brief description of the initiative was provided. Sociodemographic variables were collected at the end. Table 2 contains the means of the key variables for the three groups. Table 3 contains the correlation matrix of the key variables.

Our use of several single-item measures (e.g., $Purchase_C$, $Recommend_C$, and $Resilience_C$) was guided by two considerations. First, because this study was only one part of a lengthy questionnaire, minimizing the possibility of respondent fatigue and/or impatience,

Table 3 Descriptive Statistics and Correlation Matrix

	<i>n</i>	Mean	SD	1 ^a	2	3	4	5	6	7	8
1. <i>Perceived impact of initiative</i>	47	4.45	0.48								
2. <i>Intrinsic attributions</i>	316	4.04	0.83	0.46***							
3. <i>Extrinsic attributions</i>	316	3.33	1.10	-0.21	-0.01						
4. <i>ATC</i>	316	3.77	0.86	0.36***	0.46***	-0.06					
5. <i>PQC</i>	316	3.85	0.80	0.26*	0.32***	-0.02	0.58***				
6. <i>Purchase_C</i>	316	2.82	1.18	-0.15	0.15***	0.06	0.26***	0.35***			
7. <i>Recommend_C</i>	316	2.87	1.27	0.15	0.27***	-0.03	0.39***	0.37***	0.54***		
8. <i>Resilience_C</i>	316	2.66	1.31	0.14	0.10*	-0.05	0.29***	0.23***	0.38***	0.42***	
9. <i>ATL</i>	316	3.96	0.83	-0.22	-0.04	0.04	0.10**	0.08	0.04	0.05	0.05

^aCorrelations with perceived impact of initiative are based on the sample of participant consumers ($n = 47$).

* $p < 0.10$; ** $p < 0.05$; *** $p < 0.01$.

particularly among our hard-to-reach vulnerable population, necessitated the use of single-item measures. At the same time, recent research comparing the predictive validity of multiple-item versus single-item measures of the same constructs shows that when the object or attribute is concrete and unambiguous, single-item measures are equally effective and more efficient (Bergkvist and Rossiter 2007). Thus, on balance, single-item measures for familiar behaviors such as purchase and willingness to recommend seemed appropriate.

All measures were part of a longer phone survey administered in Spanish or English, depending on respondent preference. The survey was developed in English, translated to Spanish, and translated back to English to ensure the integrity of the measures. To minimize demand effects, we put the brand behavior questions first, then the questions on affective trust and perceived quality, and finally those pertaining to the challenger's social initiative. Our research objectives were further concealed from the respondents by the fact that brand behaviors and beliefs were elicited for both the challenger and the leader.

We dummy coded the relevant sociodemographic variables (*Marital Status* = 1 if "married or living together," otherwise *Marital Status* = 0; *Employment Status* = 1 if "work full time or part time," otherwise *Employment Status* = 0; *Income Status* = 1 if total yearly household income is "over \$30,000," otherwise *Income Status* = 0; *Educational Status* = 1 if have "some college education or higher," otherwise *Education Status* = 0). The dummy coding for these variables retained most of the information contained in the original nominal or ordinal scales (see Table 1) but made these variables amenable to inclusion as covariates in the regression analyses.

Results

Overview. We tested the hypotheses using a system of four regressions: (1) ATC predicted by participation ($D1$), awareness ($D2$), and ATL; (2) pro-challenger behaviors (i.e., $Purchase_C$, $Recommend_C$, and

$Resilience_C$) predicted by participation ($D1$), awareness ($D2$), ATL, PQC, and ATC. Because of the recursive nature of this system and the possibility of correlated errors, we estimated the four equations simultaneously using seemingly unrelated regressions (SURs). Each model in this system included the relevant interactions of interest (H1 and H3) as well as the sociodemographic variables as covariates. Additional regressions were run to provide direct evidence for H2. To enhance the interpretation of the regression coefficients in moderated regression models, we mean centered all continuous independent variables (Aiken and West 1991).

$$\begin{aligned}
 ATC = & \beta_0 + \beta_1 D1 + \beta_2 D2 + \beta_3 ATL + \beta_4 D1 \times ATL \\
 & + \beta_5 D2 \times ATL + \beta_6 \text{Marital Status} \\
 & + \beta_7 \text{Employment} + \beta_8 \text{Income} \\
 & + \beta_9 \text{Education} + \varepsilon
 \end{aligned} \quad (1)$$

$$\begin{aligned}
 Purchase_C = & \beta_0 + \beta_1 D1 + \beta_2 D2 + \beta_3 ATL + \beta_4 PQC \\
 & + \beta_5 ATC + \beta_6 D1 \times ATL + \beta_7 D2 \times ATL \\
 & + \beta_8 D1 \times PQC + \beta_9 D2 \times PQC \\
 & + \beta_{10} D1 \times ATC + \beta_{11} D2 \times ATC \\
 & + \beta_{12} \text{Marital Status} + \beta_{13} \text{Employment} \\
 & + \beta_{14} \text{Income} + \beta_{15} \text{Education} + \varepsilon.
 \end{aligned} \quad (2)$$

The other two pro-challenger behaviors, $Recommend_C$ (model 3) and $Resilience_C$ (model 4), have the same set of independent variables as the $Purchase_C$ model. In Table 4, we present the estimation results.

ATC Among Participant or Aware Consumers. Because participant consumers are described by $D1 = 1$ and $D2 = 0$, aware consumers by $D1 = 0$ and $D2 = 1$, and unaware consumers by $D1 = 0$ and $D2 = 0$, the difference in ATC between participant (aware) and unaware consumers would be estimated in model 1 by $b_1 + b_4 ATL$ ($b_2 + b_5 ATL$). Specifically, b_1 (b_2) estimates the average difference in ATC between participant

Table 4 Unstandardized Regression Coefficients from SUR Regression

Independent variables	Dependent variables			
	<i>ATC</i>	<i>Purchase_C</i>	<i>Recommend_C</i>	<i>Resilience_C</i>
<i>Intercept</i>	3.82***	2.33***	2.63***	2.18***
<i>Participation</i>	0.58***	0.17	0.59***	0.16
<i>Awareness</i>	0.40***	0.27	0.42*	0.15
<i>ATL</i>	0.16**	0.06	0.08	0.17*
<i>PQC</i>		0.58***	0.54***	0.34***
<i>ATC</i>		0.04	0.14	0.11
<i>ATL × Participation</i>	-0.13	-0.01	-0.03	-0.24
<i>ATL × Awareness</i>	-0.48***	-0.17	-0.40	-0.67***
<i>PQC × Participation</i>		-0.51**	-0.67***	-0.62**
<i>PQC × Awareness</i>		-0.05	-0.17	-0.21
<i>ATC × Participation</i>		0.53*	0.63**	0.74**
<i>ATC × Awareness</i>		-0.22	0.25	0.43
<i>Marital Status</i>	0.04	0.17	-0.04	0.37**
<i>Employment Status</i>	-0.24**	0.50***	0.25*	0.28
<i>Income</i>	-0.07	-0.01	-0.11	0.02
<i>Education</i>	-0.12	-0.00	-0.00	-0.16
<i>R</i> ²	0.14	0.20	0.27	0.16
Adjusted <i>R</i> ²	0.12	0.15	0.23	0.12
<i>F</i> -statistics _(degrees of freedom)	5.58 _(9, 315)	4.67 _(15, 315)	7.32 _(15, 315)	3.83 _(15, 315)
<i>P</i> value	0.0001	0.0001	0.0001	0.0001
System-weighted <i>R</i> ²			0.15	

p* < 0.10; *p* < 0.05; ****p* < 0.01.

(aware) and unaware consumers, and $b_4(b_5)$ estimates whether the difference between participant (aware) and unaware consumers depends on the level of ATL. H1(a) predicts that the positive difference in ATC between participant and unaware consumers will not vary with consumers' ATL. As expected, there is a positive main effect of participation on ATC ($b_1 = 0.58$, $t = 4.41$, $p < 0.01$) and a nonsignificant $D1 \times ATL$ interaction ($b_4 = -0.13$, $t = -0.86$, NS), suggesting that the positive difference in ATC between participant and unaware consumers does not vary across the levels of ATL. Thus H1(a) is supported.

H1(b) predicts that the positive difference in ATC between aware and unaware consumers will be greater at lower levels of ATL. As expected, we find a positive main effect of awareness on ATC ($b_2 = 0.40$, $t = 2.75$, $p < 0.01$) and a negative $D2 \times ATL$ interaction ($b_5 = -0.48$, $t = -2.93$, $p < 0.01$), indicating that the positive difference in ATC between aware and unaware consumers gets larger as ATL decreases. To explicate the interaction, we use tests of simple slopes (Aiken and West 1991) to examine the effect of awareness on ATC at several key levels of ATL and find that the positive difference in ATC between aware and unaware consumers disappears when ATL is high (i.e., mean + 1 SD = 4.79, difference in ATC = 0.00, $t = 0.01$, NS), becomes significant when ATL is at the mean (i.e., 3.96, difference in ATC = 0.40, $t = 2.75$, $p < 0.01$), and gets even bigger when ATL is low (i.e., mean - 1 SD = 3.13, difference in ATC = 0.81, $t = 3.76$, $p < 0.01$). Therefore, H1(b) is supported.

Prochallenger Behaviors Among Participant or Aware Consumers. To test H2, we ran separate regression models analogous to model 1, where pro-challenger behaviors ($Purchase_C$, $Recommend_C$, and $Resilience_C$) were predicted by participation ($D1$), awareness ($D2$), ATL, and the two way interactions. H2(a) predicts that the positive difference in pro-challenger behaviors between participant and unaware consumers will not vary with consumers' ATL. Consistent with H2(a), there are positive main effects of participation on $Purchase_C$ ($b_1 = 0.53$, $t = 2.78$, $p < 0.01$), $Recommend_C$ ($b_1 = 1.01$, $t = 5.11$, $p < 0.01$), and $Resilience_C$ ($b_1 = 0.57$, $t = 2.73$, $p < 0.01$), and the $D1 \times ATL$ interaction is not significant in all three models ($Purchase_C$, $b_4 = -0.06$, $t = -0.26$, NS; $Recommend_C$, $b_4 = -0.07$, $t = -0.29$, NS; $Resilience_C$, $b_4 = -0.23$, $t = -0.96$, NS), indicating that such positive differences do not vary with ATL. Thus H2(a) is supported.

H2(b) predicts that the positive difference in pro-challenger behaviors between aware and unaware consumers will diminish with increasing levels of ATL. This is supported in the case of two pro-challenger behaviors, $Recommend_C$ and $Resilience_C$, but not $Purchase_C$. For $Recommend_C$, there is a positive main effect of awareness ($b_2 = 0.71$, $t = 3.21$, $p < 0.01$) and a negative $D2 \times ATL$ interaction ($b_5 = -0.58$, $t = -2.32$, $p < 0.05$). For $Resilience_C$, the main effect of awareness is significant at the 0.10 level ($b_2 = 0.38$, $t = 1.64$, $p < 0.10$), and there is a negative $D2 \times ATL$ interaction ($b_5 = -0.88$, $t = -3.36$, $p < 0.01$). Analysis at key levels of ATL reveals that for both these

variables, the positive difference between aware and unaware consumers disappears when ATL is high (i.e., mean + 1 SD = 4.79, difference in $\text{Recommend}_C = 0.23$, $t = 0.82$, NS; difference in $\text{Resilience}_C = -0.35$, $t = -1.18$, NS), becomes significant when ATL is at its mean level (i.e., 3.96; difference in $\text{Recommend}_C = 0.71$, $t = 3.21$, $p < 0.01$; difference in $\text{Resilience}_C = 0.38$, $t = 1.64$, $p < 0.10$), and gets bigger when ATL is low (i.e., mean - 1 SD = 3.13, difference in $\text{Recommend}_C = 1.19$, $t = 3.71$, $p < 0.01$; difference in $\text{Resilience}_C = 1.11$, $t = 3.25$, $p < 0.01$). On the other hand, although there is a positive main effect of awareness on Purchase_C ($b_2 = 0.44$, $t = 2.08$, $p < 0.05$), the expected negative $D2 \times \text{ATL}$ interaction is not significant ($b_5 = -0.15$, $t = -0.64$, NS); that is, the positive difference in Purchase_C between aware and unaware consumers does not vary with levels of ATL. In sum, H2(b) is supported for two out of the three pro-challenger behaviors.

The Link Between ATC and Pro-challenger Behaviors Among Participant or Aware Consumers.

Finally, H3 predicts that participant consumers, but not merely aware ones, will exhibit a stronger link between ATC and pro-challenger behaviors relative to unaware consumers. The link between ATC and pro-challenger behaviors is estimated in models 2–4 as follows: b_5 for unaware consumers, $b_5 + b_{10}$ for participant consumers, and $b_5 + b_{11}$ for aware consumers, with b_{10} (b_{11}) estimating the difference in the ATC-behavior link between participant (aware) consumers and unaware consumers. A positive b_{10} would indicate that participant consumers exhibit a stronger ATC-behavior link relative to unaware consumers. Consistent with H3, we find that participant consumers do indeed have stronger ATC-pro-challenger behavior link than unaware consumers (Purchase_C , $b_{10} = 0.53$, $t = 1.79$, $p < 0.10$; Recommend_C , $b_{10} = 0.63$, $t = 2.07$, $p < 0.05$; Resilience_C , $b_{10} = 0.74$, $t = 2.22$, $p < 0.05$). However, in line with H3, there is no difference between aware and unaware consumers in the strength of the ATC-pro-challenger behavior link (Purchase_C , $b_{11} = -0.22$, $t = -0.74$, NS; Recommend_C , $b_{11} = 0.25$, $t = 0.85$, NS; Resilience_C , $b_{11} = 0.43$, $t = 1.30$, NS). More specifically, we find that although ATC is not a significant predictor of the pro-challenger behaviors for unaware consumers (Purchase_C , $b_5 = 0.04$, $t = 0.37$, NS; Recommend_C , $b_5 = 0.14$, $t = 1.29$, NS; Resilience_C , $b_5 = 0.11$, $t = 0.87$, NS), ATC is positively related to all three pro-challenger behaviors for participant consumers (Purchase_C , $b_5 + b_{10} = 0.04 + 0.53 = 0.57$, $t = 2.07$; $p < 0.05$; Recommend_C , $b_5 + b_{10} = 0.14 + 0.63 = 0.77$, $t = 2.73$, $p < 0.01$; Resilience_C , $b_5 + b_{10} = 0.11 + 0.74 = 0.85$, $t = 2.73$, $p < 0.01$). Finally, ATC is not a significant predictor of the aware consumers' Purchase_C or Recommend_C (Purchase_C , $b_5 + b_{11} = 0.04 + (-0.22) = -0.18$, $t = -0.65$; NS; Recommend_C ,

$b_5 + b_{11} = 0.14 + 0.25 = 0.39$, $t = 1.44$, NS), but its relationship with Resilience_C approaches significance ($b_5 + b_{11} = 0.11 + 0.43 = 0.54$, $t = 1.76$, $p < 0.10$). In sum, we find support for H3.

Additional Analysis. Given H3, we also examine the difference in the strength of the link between PQC and the pro-challenger behaviors between participant (or merely aware) consumers and unaware consumers. The PQC-behavior link is estimated in models 2–4 as follows: b_4 for unaware consumers, $b_4 + b_8$ for participant consumers, and $b_4 + b_9$ for aware consumers, with b_8 (b_9) estimating the difference in the strength of the PQC-behavior link between participant (aware) consumers and unaware consumers. As can be seen from Table 4, b_4 is positive in all three models (all p values < 0.01), indicating that PQC is associated with pro-challenger behaviors for unaware consumers. More interestingly, the PQC-behavior link is significantly weaker among participant (but not aware) consumers, as indicated by a negative b_8 (Purchase_C , $b_8 = -0.51$, $t = -2.07$, $p < 0.05$; Recommend_C , $b_8 = -0.67$, $t = -2.68$, $p < 0.01$; Resilience_C , $b_8 = -0.62$, $t = -2.25$, $p < 0.05$), and a nonsignificant b_9 (all p values > 0.10). More detailed analysis indicates that these three consumer groups' pro-challenger behaviors are associated with different sets of beliefs: participant consumers' pro-challenger behaviors are associated with ATC (all p values < 0.05) but not with PQC (all p values > 0.10), unaware consumers' pro-challenger behaviors are linked to PQC (all p values < 0.01) but not to ATC (all p values > 0.10), and aware consumers' behavioral correlates lie somewhere in-between (e.g., aware consumers' Purchase_C is associated with PQC, but their Resilience_C is associated with ATC at $p < 0.10$). Given that short-term, transactional consumer-brand relationships are primarily driven by transaction-specific assessments such as satisfaction with product quality, whereas long-term, communal relationships are driven by relational constructs such as trust (Agustin and Singh 2005, Garbarino and Johnson 1999), our results highlight the qualitatively distinct nature of the consumer-challenger relationship across these three consumer groups. More specifically, these results suggest that through this initiative the challenger has successfully built a communal, trust-based relationship with participant consumers.

Validity Checks

In addition to including sociodemographic variables as covariates in all our regression analyses, we conducted some additional analyses to strengthen the validity of our findings in the face of alternative explanations. First and foremost, it is possible that the groupwise differences in ATC and pro-challenger

behaviors might be due not so much to initiative participation or awareness, but to some general differences across the three consumer groups. These could include groupwise differences in information processing (e.g., participant consumers may have lower need for cognition and be less skeptical of marketer actions) or decision-making criteria (e.g., participant consumers might weight quality less heavily in their purchase decisions), or a more general self-selection bias. Although such confounds are always a concern in studies that are not purely experimental in nature, both our focus group (e.g., quotes like, “they are working on not the immediate but long-term results . . . they give us the trust to continue using their products,” and “This means they [challenger] care about our welfare”) and survey data (e.g., the positive correlation between perceived impact of initiative and ATC, $r = 0.36$, $p < 0.01$) point to the role of initiative participation and awareness per se. As well, the moderating effects of ATL on the links between awareness and both ATC and pro-challenger behaviors allay somewhat the concern that aware consumers are fundamentally different from unaware consumers.

We also conducted some additional analyses to examine these alternative explanations. For instance, it is possible that consumers with more positive a priori beliefs about the challenger chose to participate in (or were more likely to be aware of) the CSR initiative, and that perhaps only those participant consumers with the most positive a priori beliefs about the challenger actually completed the survey (i.e., a self-selection bias). If this is the case, then it is reasonable to expect, in this essentially two-brand market, that these groups would also differ in their a priori beliefs and behaviors pertaining to the leader. However, except for $Purchase_L$, there are no differences in four of five leader-related beliefs/behaviors (ATL, PQL, $Recommend_L$, and $Resilience_L$; see Table 2), suggesting that the three consumer groups share similar beliefs about, or behaviors toward, oral care brands in general. The finding that participant consumers' $Purchase_L$ is lower than that of the unaware ones is probably due to the fact that, in this essentially two-brand market, where individual households' demand for toothpaste is likely to stay constant, greater $Purchase_C$ will almost inevitably lead to lower $Purchase_L$, as is indicated by the significant negative correlation between $Purchase_C$ and $Purchase_L$ ($r = -0.43$, $p < 0.0001$). In addition, among the participant consumers, early and late respondents appear to be no different in terms of demographic characteristics as well as their beliefs and behaviors toward either the challenger or the leader. Therefore, eagerness to respond to the survey does not seem to be correlated with challenger-specific factors.

A more specific alternative account would suggest that the more favorable reactions of the participant versus the aware consumers are driven by the former's lower need for cognition and lower skepticism, both of which have been linked to lower socioeconomic status (Cacioppo et al. 1996). However, our focus group discussions suggest that the participant consumers have thought about the initiative and are fully cognizant of the profit-related motives behind the challenger's initiative (e.g., “it's a form of marketing not only to get their products out but also to help the community”). This is also reflected in the similarity across the three groups in the extent to which they make extrinsic attributions ($F < 1$, NS; Table 2), suggesting that they share similar levels of skepticism, at least in terms of articulating the business motives underlying the challenger's initiative. On the other hand, participant consumers do make greater intrinsic attributions than the other two groups, which our analysis shows to be positively related to the perceived impact of the initiative ($r = 0.46$, $p < 0.01$). This indicates that participant consumers did not automatically attribute intrinsic motives to the challenger, but instead based these on actual initiative-specific evidence. In other words, the correlations between the perceived impact of the initiative and intrinsic attributions, and between perceived impact and ATC, indicate that participant consumers' attitudinal changes were not driven as much by peripheral cues (e.g., CSR program equals a good brand) as by the extent to which the program actually made a difference in their lives (i.e., a central cue).

It is also possible that our H3 results are caused not by program participation per se, but because the participant group is intrinsically different from the aware and unaware groups in its weighting of relevant brand-specific criteria, such as affective trust and perceived quality. If this is the case, then such differences are also likely to be apparent in their reactions to the leader brand. We examined this by regressing the three pro-leader behaviors ($Purchase_L$, $Recommend_L$, and $Resilience_L$) on participation ($D1$), awareness ($D2$), PQL, ATL, and relevant two-way interactions. As usual, sociodemographic variables were included as covariates. In all three models, PQL is significant in predicting pro-leader behaviors (all p values < 0.01), whereas ATL and all two-way interactions are nonsignificant, indicating that, unlike in the case of pro-challenger behaviors, these three consumer groups' pro-leader behaviors are similarly determined. Furthermore, to address the possibility that the groupwise differences in sociodemographic profile might partially account for the participant consumers' weighting ATC more heavily in their challenger-related behaviors, we reran our H3

analysis with regression models that include relevant two-way interactions between PQC/ATC and the four sociodemographic variables (e.g., PQC \times Employment, ATC \times Employment) and obtained similar results to those presented earlier, in support of H3. These analyses allay the concern that these three consumer groups are intrinsically different in terms of the criteria they use to evaluate oral care brands.

A more specific concern pertains to the potential mechanisms underlying the effects of participation on pro-challenger behaviors. One could argue, for instance, that the positive effects of participation might be due to the greater product exposure accompanying participation rather than the benefits thus obtained. Several factors help rule out this possibility. First, if it is greater product experience that underlies the observed effects of participation, then the association between PQC, gleaned through such experience, and pro-challenger behaviors should be strongest among participant consumers. We find the opposite: the link between PQC (ATC) and pro-challenger behaviors is weakest (strongest) among participant consumers compared to the other two groups (Table 4). Second, the positive correlation between the perceived impact of the initiative and ATC supports the focus group finding that it is program participation, with its concurrent benefits (e.g., enhanced oral health and well-being among the participant children), rather than product experience per se, that has engendered greater ATC among the participant consumers, producing more favorable pro-challenger behaviors. At the same time, the aforementioned positive correlation between perceived impact of the initiative and ATC reduces the concern that the higher levels of ATC among participant consumers may be due to a self-perception dynamic (i.e., I chose to participate in the initiative, therefore I must really trust the challenger). Participant consumers' ATC, if caused by a self-perception process, should not correlate with the perceived impact of the initiative. Third, it is the children, not the parents who completed our survey, who physically participated in the initiative, where such product exposure would have occurred to a greater extent. Thus, the reactions of parents are not likely to be as influenced by product exposure per se.

Finally, we also checked for common-method bias, which can be a problem in a survey study such as ours where data on both independent and dependent variables are collected from the same respondents using similar types of response scales (i.e., Likert scales). We checked for this potential problem using Harman's single-factor test (Podsakoff et al. 2003), which suggests that a substantial amount of common-method variance is present if (a) a single unrotated factor solution emerges from an exploratory factor

analysis or (b) one general factor accounts for the majority of the covariance among the measures. With our data, the unrotated factor solution revealed five factors with Eigen values greater than one, accounting for 72.2% of the total variance, with the first unrotated factor accounting for 23.4% of the total variance. The absence of a general factor in the unrotated structure indicates that common-method bias does not pose a significant problem for our field study.

General Discussion

This research builds on the complementary CSR literatures in strategy and marketing to provide insight into the efficacy of CSR as a challenger's competitive weapon against a market leader. Based on focus groups and a quantitative field survey about a real-world CSR program, we find that the challenger gets more favorable attitudinal and behavioral reactions among consumers who have participated in its CSR initiative, relative to those who are merely aware. Specifically, participant consumers demonstrate the desired attitudinal and behavioral changes in favor of the challenger, regardless of their prior relationship to the leader, whereas aware consumers' reactions become increasingly less favorable as their relationship bond to the leader increases. As (if not more) importantly, participant consumers form a communal, trust-based relationship with the challenger, whereas merely aware consumers still maintain a transactional relationship with the brand. Our findings provide the first microlevel empirical affirmation of the notion of strategic CSR (Kotler and Lee 2004, Porter and Kramer 2006): a brand's CSR initiative offers a competitive advantage when it addresses a key concern of the brand's consumers and necessitates their active participation rather than having them be passive beholders. Our findings also highlight the need to take into account consumers' existing loyalty to a competitor when designing and implementing a CSR initiative and assessing its business returns.

Theoretical Implications

Our findings have implications for theories of CSR, persuasion, and competitive strategy. By examining consumer reactions to a real-world CSR initiative by a challenger brand in its attempt to make inroads into the incumbent's turf, we bring a microlevel psychological perspective to a macrolevel strategic issue (e.g., Porter and Kramer 2006)—CSR's potential as a competitive lever and paint a more nuanced, realistic picture of the business returns to CSR than prior research in marketing, which has focused overwhelmingly on single-brand contexts. Most importantly, reflecting the scenarios where consumer participation

is integral to the social program such as the aforementioned Dove initiative, we differentiate between participant consumers and those who are merely aware, and document for the first time the qualitatively different reactions between the two groups. Whereas aware consumers are likely to engage in biased processing of a CSR initiative to defend the brand they are loyal to, participant consumers who have a positive experience with the program are likely to demonstrate positive reactions to the CSR initiative and enter into a communal, trust-based relationship with the brand behind the social initiative. Our finding that direct participation in a brand's initiative is associated with desired attitudinal and behavioral change regardless of consumers' strong bond with a competitor is interesting in light of the persuasion resistance literature (Ahluwalia 2000). Our findings suggest that first-hand, positive experience with a brand's CSR initiative powerfully conveys the trustworthiness of the brand, despite consumers' motivation, if any, to discount or resist this information.

Furthermore, our research attests to the pivotal yet thus far unexamined role of affective brand trust at the individual consumer level in driving the strategic returns to CSR and examines the conditions under which it might matter the most. Specifically, direct participation in a brand's CSR initiative, assuming a positive experience, is associated with not only greater affective trust in that brand, but also a strong, communal brand relationship rooted in such affective trust, with consumers engaging in a range of advocacy behaviors toward the brand. At the same time, we show that the reactions of merely aware consumers can range in favorability depending on their affective trust in the rival brand. In other words, affective trust in the market leader brand represents the competitive barrier a challenger must overcome to win consumers over from its rival, and therefore should be taken into consideration in the formulation of the latter's competitive strategy, CSR-based or otherwise.

In fact, a much debated question in competitive strategy pertains to how a challenger might take on a market leader, winning over the latter's loyal consumers (e.g., Morgan 2009, Shankar et al. 1998). In light of extant thinking that when competing against a leader a challenger's superior marketing mix is often insufficient to counter the incumbent brand's advantage (Bowman and Gatignon 1996, Shankar et al. 1998), our research shows, for the first time, the challenger's ability to leverage its CSR to overcome this incumbent advantage. Although our research does not allow a direct comparison between a CSR-based competitive strategy and a marketing mix-based one, it does suggest that the former, by driving home to consumers in tangible ways that "we have your best

interests at heart," is uniquely effective at forging an affective bond. Such "straight to the heart" strategies are likely to be particularly effective in categories where product differentiation is minimal, evaluation of product performance is inherently ambiguous (i.e., credence products), or consumer involvement is low, rendering rational marketing mix-based arguments (e.g., a superior attribute) largely ineffective.

Managerial Implications

CSR can be implemented in various ways, such as donating a part of revenue to a cause, raising awareness of a social issue, or encouraging employees to volunteer in the local community. The superior business returns among the participant consumers relative to the aware consumers in our study highlight the importance of having a strategic CSR initiative that engages consumers, rather than treating CSR as an add-on, spectator sport. Our research suggests that when devising a CSR strategy, companies should focus on the important concerns of their target consumers, and try to actively involve their consumers in the resulting CSR initiatives. If a high percentage of a company's target consumers participate in its CSR efforts, the company will be able to reap maximal returns to such efforts. This is also consistent with recent thinking in the strategy literature (Davis 2005, Pettigrew 2009, Porter and Kramer 2011) that key consumer/societal problems (e.g., obesity, health, poverty, and environment) present unprecedented opportunities for companies to gain long-term competitive advantage by creating both social and business value.

In contrast to such a strategic approach to CSR, many firms still treat CSR as cosmetic, public relation stunts, with some spending more on CSR advertising than on the initiatives themselves (Porter and Kramer 2002, 2006; Yoon et al. 2006). The drawbacks of such approaches are increasingly evident: they produce minimal social impact, generate consumer skepticism, and, consequently fail to deliver business value. As a contrast, our research suggests that in certain contexts CSR budgets may be better spent gaining the active participation of consumers rather than merely making them aware of these initiatives. Unlike program participation, which is likely to produce long-term, vivid beliefs about a brand's genuine desire and ability to improve the welfare of the participating consumers, the impact of CSR advertising, particularly when it is not a precursor to participation, is likely, in terms of actual probrand behaviors, to be more muted. At a minimum, then, a firm needs to weigh the pros of raising widespread awareness of its CSR efforts through advertising with the cons of its ultimately low potential to be of significant strategic worth (see also Sen et al. 2006). The ultimate design and implementation of CSR initiatives will depend, of course,

on both the strategic benefits examined in this paper and the costs of achieving these benefits compared to other mechanisms for doing so.

Managers should note that a participative campaign per se does not guarantee success. The “perceived efficacy” of the initiative (i.e., the initiative’s ability to make a difference in the participant consumers’ lives) plays a big role in convincing consumers that the company has the community’s best interests at heart. In turn, this leads to affective trust toward the brand and helps reshape loyalties. Thus, managers need to realize that a prerequisite to creating business value through CSR is the creation of social value. Interestingly, as our study results revealed (recall the focus group quotes), consumers are tolerant of market motives on the part of the company as long as the company is serious about making a difference in the social arena. In fact, many consumers even laud the fact that the sponsoring company has business interests as well behind its CSR initiative, as that ensures that they would put their market muscle behind their CSR. This implies that managers do not need to hide market motives and oversell their altruism while communicating CSR; this may even backfire if the target segment perceives things to be different on the ground.

Overall, for challengers aiming to make inroads against a market leader, our research showcases the efficacy of a CSR initiative as a competitive lever. Rather than competing head to head against the leader by making incremental improvements in product attributes or relying on price promotions, which the prior research has shown to be largely ineffective, the challenger brand can resort to an innovative CSR initiative, appealing to consumers’ heart and reshaping the game of competition. Marketing research that reveals the levels of ATC and ATL in the target market would help managers make more informed decisions of the costs and benefits of a participative campaign versus one that raises awareness regarding the firm’s CSR initiatives. Needless to say, however, given that consumers with low ATL may switch over to the challenger based on knowledge of its CSR initiative, raising awareness among target consumer also has its benefits.

Public Policy Implications

By describing an actual example of a partnership between a company and a nonprofit that was supported by the government, our study sheds light on the critical complementary roles firms can play to governments and nongovernmental organizations when they exercise their core competencies in responding to a social need (Mahoney et al. 2009). In particular, because of the potential comparative

advantage of business over governments or nonprofits (e.g., business competencies and resources) in solving certain social problems (Hess et al. 2002, Porter and Kramer 2002), governments should encourage firms to play an active role in solving social issues that intersect with, rather than are peripheral to, their particular businesses: areas where the private sector can leverage their core competence and where the potential for joint social and business value creation is the greatest. For example, the White House Task Force on Childhood Obesity Report to the President (2010) emphasizes the importance of cross-sector partnership and role of private businesses.

Note that social issues typically go through a life cycle from obscurity, to indifference/inattention, to salience only among opinion leaders, to center of attention in the media and legislative concerns, and finally to resolution (Waddock 2008, p. 64). When appropriate, government should provide guidance or alert businesses about the importance or severity of certain nascent or emerging social issues, and call for actions from the private sector before they become prominent. The wake-up call to combat the epidemic of oral diseases by the 2000 Surgeon General report on oral health and the subsequent launch of the CSR initiative studied in this paper is a fine example of government providing such timely guidance.

Limitations and Future Research

Due primarily to the real-world nature of this research, it has some methodological limitations. First, it was not possible to conduct a true experiment, wherein the outcomes could have been unequivocally attributed to initiative awareness or participation. Thus, despite our best efforts and a number of validity checks, we cannot entirely rule out certain alternative explanations for our results. For instance, although both the focus group and survey data point to the causal role of participation/awareness, the nature of our field study (i.e., post-test only) prevents us from completely ruling out the possibility that our results for H1 and H2 may partly be due to some pre-existing group differences in the challenger-specific beliefs and behaviors. As well, although participant consumers weighted affective trust more heavily than unaware consumers only in pro-challenger behaviors but not in pro-leader behaviors, we cannot unequivocally rule out the possibility that there are pre-existing group differences in weighting of affective criteria with regard to the challenger.

Second, because of the real-world constraints in reaching a difficult-to-reach consumer segment (e.g., Word 1997), we have only a small sample of participant consumers in our field study. Similarly, because of the generally low awareness of the initiative (i.e., only 13.4% of nonparticipant consumers were aware),

we have only a small sample of aware consumers. Third, although focusing only on Hispanic consumers increases the internal validity of our findings, future research should examine whether our results generalize to other groups, ethnic and otherwise. In addition, because we examine only the scenario of a challenger competing against a market leader, future research should broaden the competitive context to include a larger number of players as well as players with different market positions such as a niche player (e.g., Zhu et al. 2009). Finally, despite assurances from prior research (e.g., Bergkvist and Rossiter 2007), some of the more nuanced constructs, such as Resilience_C and CSR attributions, would probably have been better measured using multiple items.

More generally, our work opens up several important avenues for future research. First, future research might dig deeper into the aspects of participation that help build ATC. Although we show that participation in a brand's initiative builds ATC to overcome consumers' extant bond with a competitor and yield superior business returns, our research does not pinpoint exactly what it is about direct participation that drives ATC. Although our qualitative study suggests that it is because participation presents convincing, hard-to-refute evidence of the challenger's trustworthiness, future research should examine the phenomenon in greater detail in a more controlled setting. Relatedly, it is expected that the valence of the participation experience, as well as the degree of ambiguity regarding the outcomes of participation, might affect the reactions of participant consumers. In our empirical context, both focus group discussions and the survey results indicate that the experience of participation is overwhelmingly positive and the outcomes are noticeable and relatively unambiguous (e.g., mean value of perceived impact of the initiative is 4.45 on a five-point scale). Future research might investigate how these factors, valence of experience and the quality and ambiguity of program outcomes, impact participant consumers' reactions to the CSR initiative.

Additionally, given that providing direct experience is expensive, future research might examine factors that decrease consumers' resistance to CSR

communication/advertising and help win them over, particularly when they have a strong bond to a competitor. For example, our study did not examine the media through which nonparticipant consumers became aware of the challenger's initiative, or the frequency and the content of the CSR communication (e.g., information on number of people benefited and amount of resources contributed) they were exposed to. Studies of persuasion have found that, relative to argument-based advertising, narrative or drama-based advertising reduces counterargument, is processed empathically (Deighton et al. 1989), and is, furthermore, more effective at building consumer-brand connections (Escalas 2004). Accordingly, future research might examine how forms or tactics (argument based or drama based) of CSR advertising influence its effectiveness in light of consumers' motivation to resist attitude change.

Another interesting question for future investigation is the possible existence of a first-mover advantage for a brand that pioneers the use of CSR as a strategic lever in its market area. Our research attests to the power of CSR in reshaping a challenger's competition against a leader. However, what if the leader strikes back through its own CSR initiative? Will the timing and the proactivity of CSR strategy affect consumer reactions? Perhaps the late mover's initiative triggers more self-serving attributions (e.g., because of competitive pressure) and less intrinsic attributions, thus hindering its ability to build affective trust and drive procompany behaviors. Finally, in addition to microlevel consumer reactions (e.g., affective trust and probrand behavior), future research could also examine the impact of a brand's CSR initiative, particularly participation therein, on its market share or customer lifetime value (i.e., the long-term effectiveness of its CSR strategy).

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Appendix. Key Constructs and Descriptives (*n* = 316)

Prochallenger behaviors		
Purchase _C (1 = never buy, 2 = rarely buy, 3 = sometimes buy, 4 = often buy, 5 = always buy)		Mean = 2.82
How often do you buy [the challenger] when you shop for toothpaste for yourself?		SD = 1.18
Recommend _C (1 = not at all likely, 5 = extremely likely)		Mean = 2.87
In the next six months, how likely are you to recommend [the challenger] to someone you know?		SD = 1.27
Resilience _C (1 = definitely would not buy, 5 = definitely would buy)		Mean = 2.66
If you heard or read a negative story about [the challenger], how would it affect your likelihood of buying [the challenger]?		SD = 1.31

Appendix (Continued)

Affective trust in challenger (1 = strongly disagree, 5 = strongly agree)	$r = 0.60$
The makers of [the challenger] have my best interests at heart	Mean = 3.77
The makers of [the challenger] genuinely care about my family's well-being	SD = 0.86
Perceived quality of challenger (1 = strongly disagree, 5 = strongly agree)	$r = 0.49$
[The challenger] is good at whitening teeth	Mean = 3.85
[The challenger] is good at freshening breath	SD = 0.80
Affective trust in leader (1 = strongly disagree, 5 = strongly agree)	$r = 0.61$
The makers of [the leader] have my best interests at heart	Mean = 3.96
The makers of [the leader] genuinely care about my family's well-being	SD = 0.83
Perceived impact of initiative ^a (1 = strongly disagree, 5 = strongly agree)	$r = 0.59$
XX [the name of the initiative] has improved my child's life	Mean = 4.45
XX [the name of the initiative] has enabled my child to take better care of his/her teeth	SD = 0.58
CSR attributions (1 = strongly disagree, 5 = strongly agree)	
Intrinsic attributions	
The make of the challenger sponsors XX [the name of the initiative] because it genuinely cares about the well-being of children	Mean = 4.04 SD = 0.83
Extrinsic attributions	
The make of the challenger sponsors XX [the name of the initiative] because it wants to sell more products to my community	Mean = 3.33 SD = 1.10

^aOnly participant consumers ($n = 47$) answered these questions. For all other variables, $n = 316$.

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