

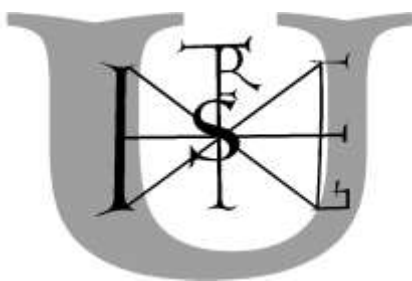
SZENT ISTVÁN UNIVERSITY
GÖDÖLLŐ

**THE ROLE OF INTEGRATED MARKETING
COMMUNICATION IN THE COFFEE CONSUMER'S
BEHAVIOUR**

THESIS OF THE DOCTORAL (PHD) DISSERTATION

KRISZTINA LETENYEI

**Gödöllő
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1. INTRODUCTION

1.1. The topicality and significance of the subject

Coffee is one of the most popular commodities in the world. Yearly about 100-120 million sacks of coffee are produced. (One sack is 60 kg.) The biggest coffee producers: Brazil, Columbia, Vietnam. Out of all the tropical products, coffee has got the greatest significance in world trade. Coffee gives work to 25 million people worldwide.

In Hungary coffee has the *second highest consumption amongst foods* only white bread outranks it. (In discount coffee is strong 2004) (Most of us are satisfied with our weight 2005) Until 2003 it was third in the ranking of foods, the second place was taken by traditionally cooked soup. Today, *the coffee market* in Hungary is *revolutionised*, consumption habits have changed, new types of coffee have been born and old ones have been wiped out. The glorious times of coffee beans are over. Apart from coffee beans, we can separate two other categories: the ground-roasted coffees and the instant coffees. The first category, we can split into two more groups: real coffee and coffee mixtures. Within the market of instant coffee, there are another three groups: real coffee, coffee mixtures and specialities (i.e. contains some added things, for example sugar, flavouring, nuts, like cappuccino). In the last decades, in Hungary *the market of instant coffee improved most vigorously*, at the moment specialities come more to the forefront. In 2002, a *new segment was introduced: 3in1*, which is coffee, cream powder and sugar in one. In 2004, this category improved most dynamically; in 2005 a new generation within 3in1 was born. In Hungary, the yearly consumption of coffee per person is 2,8 kg.

The significance of coffee is highlighted by the amount of money spent on *coffee adverts*, which makes up a momentous part of the total spending on adverts. All year we can see coffee adverts on the television, in the „strongest months” there can be as many as five coffee adverts at the same time. Because of the high frequency the Reach is favourable too. The supplementary media supports the TV spots as well: first of all the giant posters and city lights. The biggest coffee distributors also *keep on building brands*, of which one of the essential tools is an intensive campaign.

1.2. The premises of the research, objectives

After the practical recognition of the Hungarian food market, in accordance with my interest and the topicality and significance of the subject, I applied for the Ph.D. training in 2001.

The basic objective of the Ph.D. essay is the review of the role of marketing communication within the community of coffee consumers, and the analysis of the consumption habits within the Hungarian coffee market.

Sub-tasks:

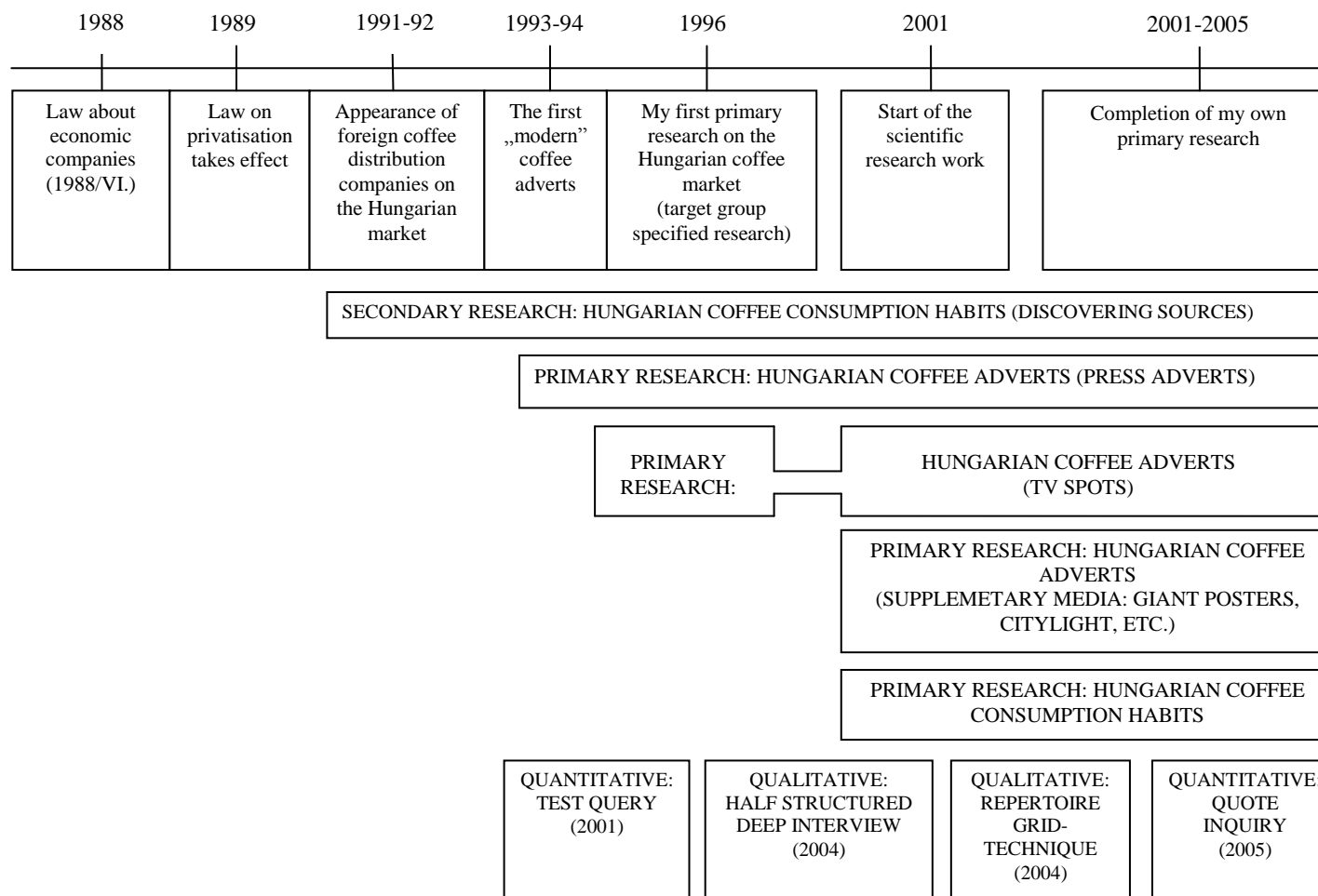
- Analysis of the macro- (social-cultural, technological, economical, political-legal, environmental, demographical) and micro-environments.
- Analysis of coffee adverts, examination of the media messages, surveying of the role and weight of the verbal message elements with the help of slogan analysis.
- Survey of the image and verbal elements of coffee adverts, analysis of the differentiation based on the sensory organ effects during brand building.
- Analysis of the functions of packaging, survey of the roles of colours in advertisement psychology on the coffee packaging and in the adverts.
- Analysis of the different forms of appearance of coffee as the product, determination of its competitors within the single market segments, adaptation of the product hierarchy to the Hungarian coffee market, definition of the life cycles at brand level on the different coffee markets.
- Discovery of the continuum of coffee as the product and coffee drinking as the service, survey of the different places, circumstances and motivation of drinking coffee.
- Review of the factors having an influence on the development of coffee consumption habits, adaptation of the behaviour models of food consumers to the Hungarian coffee market, definition of the direction of change in the habits of coffee consumption and visible trends of the general consumer habits within the Hungarian coffee market.
- Identification of the tendency of the coffee consumption and the typical characteristics on the Hungarian coffee market, discovery of the clusters of coffee consumers and the identification of the clusters based on the general consumption habits, and the cross checking of these; analysis of the decisions regarding the buying of coffee, defining the factors and rating the coffee buyers into clusters.

2. MATERIAL AND METHOD

The basis for elaboration of the subject is the familiarisation with the literature. The extensive secondary information includes the relevant professional books (from the field of marketing, market research, marketing communication, economical statistics), the magazines of the food industry (which cover the matters of the coffee market and coffee consumption habits), marketing magazines (e.g. Teszt Magazin, Kreatív), weekly and daily newspapers (dealing with the position of coffee on the world market, and with the Hungarian legislation). In addition to these, there is valuable information available in the Internet.

Based on the secondary market research, I completed the STEPED analysis regarding the Hungarian coffee market. The overview of the economical coherency of the coffee world market, the introduction of the participants in the Hungarian coffee market and the recognition of the history of coffee consumption and the process of coffee production I based on the secondary sources. I completed primary research in respect of getting to know the product scales, reviewing the colours of the coffee packaging, analysing the coffee adverts and the coffee consumption habits. The primary market research means an integrated collection of data in several steps, each step based on the previous one. In the autumn of 2001 I completed a questionnaire survey as a test, which became the basis for the final questionnaire form. In the spring of 2004, in the frame of a qualitative research, I performed half structured deep interviews. The process of these interviews was done with the NVivo software by content analysis. The next qualitative research method was the repertoire-grid technique, which I used in the summer of 2004. All these surveys added to the perfection of the questionnaire that I completed for the countrywide survey. Within the quantitative market research I performed the survey by questionnaire in the year 2005. The test was run in May 2005, and the countrywide survey was completed in two steps: in June and in September of 2005. The method of the sampling was by quotas. The size of this was 868 people. The query was based on the regional pattern of Hungary. Due to the 7 regions identified by the KSH (Central Office of Statistics), I choose one place in each of them for the query, and each region I represented in the questionnaire due to the number of inhabitants, to the homogeneity or heterogeneity of the coffee consumption habits. I processed the results with the SPSS software. For the analysis I also used techniques with several variables: discrimination analysis, main component analysis, factor analysis and cluster analysis.

My own empirical research results in respect of the Hungarian coffee market and the coffee consumption habits are in chart No. 1.



1. Chart: My own empirical research regarding the Hungarian coffee market and the coffee consumption habits therein

3. THE MAIN STATEMENTS AND RESULTS OF THE DISSERTATION

3.1. Analysis of the macro environment

I studied the macro environment of the Hungarian coffee market with the help of the STEPED analysis. Within the monitoring of the social-cultural environment the highlight is on the trends in the change of life style, like the presence of the faster paced life, health awareness and hedonism. The change in the general consumer habits is showing in the area of coffee consumption too: instant coffee, cappuccino, 3in1, coffee with reduced caffeine, tinned coffee emerged. The technological environment directed the changes in the technique of coffee packaging, introduced the aroma stopper valve. To make perfect coffee, it is an essential condition to harmonise the different technological processes, to build one technical process on the other. The different coffee grinders and other tools used for making coffee are all the result of the technical development. Also product innovations are due to the technological solutions.

Part of the economical environment is the fact that with the improvement of the financial situation of the populous the purchasing power has grown; health awareness came to the forefront. Due to the fast style of living, there is less free time, and there is a need for products that can be prepared quickly. With the spread of shopping centres a new way of shopping appeared, the shopping habits changed. The coffee market shows cycles, the demand was highest in 1994, the coffee prices touched bottom in 2002. From 2003, the supply has fallen and prices have risen. The Hungarian coffee market is price sensitive and there is strong competition, which means that the effects of the world markets only show on the Hungarian market after a delay. Coffee is a pleasure product, and as the focus moves from coffee to the drinking of coffee, the Engel-law only prevails limitedly.

While analysing the political-legal environment privatisation must be mentioned, it allowed western multinational companies to represent themselves in Hungary. In this area belong the laws and legislation. Within the natural environment we have to focus on the facts, that coffee is produced in the so called „coffee-belt”, the ecological potentials are nearly totally exhausted, the genetic potentials are fairly exploited and the technical potentials are continually resorted, but there are further possibilities. From the effects of the demographic environment the most important is that the number of inhabitants of Hungary is decreasing and the society is getting older. These factors together lead to the setback of the total demand, which could only be compensated by a greater increase in income.

3.2. Analysis of the micro-environment

The Hungarian coffee market is a typical oligopoly market with four big participants. Sara Lee Hungary is the owner of the Douwe Egberts brands, Kraft Foods owns the Jacobs brands, to Nestlé Hungária Kft. belong the Nescafé product family, finally Tchibo Budapest Kft., after the international fusion, is entitled to the Tchibo and Eduscho brands. In a situation like this, when the big market players co-operate, their combined profit grows and the intensity of the competition decreases. The Competition Court forbids a horizontal agreement. In an oligopoly market the behaviour of one company depends strongly on what the other is doing. This market is a typical example where the game theory can be applied. This theory is actually trying to find the answer to: „What does A think B would do if B would think A would do this and that.” (SAMUELSON, P. A. – NORDHAUS, W. D. 1992) Two Hungarian economists, János Neumann and János Harsányi are the great inventors of the game theory.

3.3. The integrated marketing

The items of marketing cannot be strictly separated; their effects have to be looked at together. By the integrated 4P's, the individual items should not be researched separately but together, so I draw four circles overlapping each other, and in these overlaps I placed the parameters of coffee. As products, I took coffees, coffee machines and vending machines, to the promotion adverts and PR. In the overlaps of these two are the consumer habits. Distribution can be described with convenience, availability and distance, in the section shared with the product there is merchandising and range of choice. The packaging affects the product, the promotion and the distribution together. The customs, fees and taxes affect the price; the price affects the demand that can be increased by discounting. In the overlap of price and promotion is the sales promotion, rebating and the psychological pricing. The product, the promotion and the price are affected by the consumers' samples, draws, prize games and tastings. Between price and distribution is home delivery. In the area of overlap of all four circles are personal sale and DM.

3.3.1. The product, the continuum of coffee-coffee drinking

Coffee is a special nutrition product, a first class pleasure article. The product, i.e. the coffee, can take special forms depending on the place it is consumed. In a buffet, or even at home, the intake of caffeine can be the goal, whilst in a coffee shop it becomes rather a cultural activity, so the service is in the foreground.

Coffee itself is a product, and coffee drinking is a service. We drink coffee at home, to have a coffee is more connected to a coffee shop, when the focus is more on the service. When we buy coffee for home, we get packaged, branded coffee. From the coffee bought in the shop, we have multiple consumptions (except for the single portion cappuccino or the 3in1 servings). We do not consume the coffee where we bought it, so the buying and the consumption are separated in time. In the coffee shop we buy the product including the service, so buying and consumption timely concur. In this case the frequency of the buying and consuming are the same, since the bought product and service are „consumed” right on the spot. In the restaurants and the coffee shops, we cannot see the packaging of the coffee, we only see the prepared coffee and the added service. When we buy our own coffee, we see the packaged product in the shop, so the packaging, as a tool of marketing communication, plays an important role in our decision for buying coffee. In this case service is not included in the product. Drinking coffee at home is a rather lonely action, while in a coffee shop it is a social event.

Usually for home we buy roasted-ground coffee or instant coffee, but in the coffee shops, or especially in the „coffee bean shops” the drink is made from coffee beans. In these, which appeared in the recent past but are rapidly spreading, „coffee bean shops” we can choose the type of bean, the style of roast, and from these chosen beans the fresh coffee is prepared. The coffee we buy for home, by the time it gets from the roasting factory onto our table, cannot be that fresh, the packaging has to preserve the freshness. In the shop, when we are selecting the coffee from the shelf, we choose a brand, so exactly this packaging is important. In the coffee shops, we do not know from which coffee the drink is made; we choose a style of coffee (espresso, long coffee, cappuccino, etc.), but we neither know the brand, nor the Arabica-Robusta ratio. Only in the „coffee bean shops” we have the possibility to observe the making of the coffee we „created”. In the shop, the selection of brand is conscious, the freedom factor of choice is higher. In the coffee shops, our brand selection is rather adaptive. Since we do not see the packaging of the coffee, the coffee shop, the „coffee bean shop” becomes important – in the first place, we choose them. The service is part of the deal. The coffee bought for home does not include the service, we have to serve it ourselves.

I adapted the Porter competition model for the Hungarian coffee market. I identified the competitors of coffee by the form of product and the competition areas by the advantages of the product. I adapted the product hierarchy to the Hungarian coffee market, the needs group contains the pleasure products, the product group contains the caffeine-laden products, the product class means the caffeine-laden drinks, the product line is the coffee itself, the product types are the beans, ground-roasted and instant coffees. The most significant brands are Douwe Egberts, Jacobs, Nescafé and Tchibo. Product units are for example the 250gr unit. I also identified the competitors of each coffee type due to the most important product parameters, attributes. This way I examined from the viewpoints of

freshness, speed, tastiness and aroma experience. Finally I described the five levels of the product regarding the Hungarian coffee market, using Kotler's model.

I examined the continuum of coffee-coffee drinking, identifying the most important places of coffee consumption and analysing the circumstances of consumption at these places I marked several levels starting from coffee and moving towards coffee drinking. I also analysed the tools of coffee drinking in these places. I formed parameters by the differences of the circumstances and lined up the individual places of coffee consumption.

I analysed the product lifelines of coffee, focusing on the appearance of the different types. I examined the functions of packaging, representing the basic, the commercial and the marketing functions with circles, and I put examples in the different sections (also in the overlaps).

I also surveyed the factors affecting the demand for coffee (price, average income of consumers, size of market and number of households, prices of other products and availability, taste and preferences), and the price flexibility of the demand of coffee. I created short and long term demand schedules.

3.3.2. Integrated marketing communication

The elements of marketing show their effect intensifying each other, which is why they have to be examined together. Marketing communication, although it is an individual mix-element, has an effect on every part of marketing. The product policy, price policy and the place policy cannot be developed without taking into account the targets of marketing communication. The ones directing the company with a marketing approach, give marketing a key position in the life of the company, and pay special attention to marketing communication within the marketing elements.

In the case of coffee, before analysing integrated marketing communication, there is a need for the interpretation of integrated marketing. From the mix-elements, product policy has the leading role, on that the marketing communication analysis can be built. Accordingly I started my analysis with the integrated interpretation of the 4P's and the examination of the product. The analysis based on the integrated marketing was followed by the analysis of the integrated marketing communication regarding coffee, where slogan-analysis and colour psychology had my special attention.

Within marketing communication, first I examined the slogans. I described the advantages of the individual brands and collected the previous and current slogans. Based on this research, the change of the slogans and the advantages of the brands

can be followed. During the research I focused on the biggest brands: Douwe Egberts Omnia, Douwe Egberts Karaván, Eduscho De Luxe, Jacobs Krönung, Jacobs Merido Aroma, Nescafé and Tchibo.

The Douwe Egberts Omnia is a traditional brand in Hungary. Its slogan in the 90s: „The classical aroma”. Omnia meant tradition, quality and trustworthiness; its consumption determined the family idyll, the shared experiences. The following slogans had care as a keyword. The adverts focused on care, love and the family togetherness. The present slogan: „The experience of the inimitable aroma.” In the centre is the attractive aroma.

The Douwe Egberts Karaván can be associated with being dynamic. This coffee gives us the zip we need every day. We can start the day with this coffee as it will supply the joy and fulfil our need to meet the challenges of the every day life. In the mid- 90s the music of Karaván was the same as the one of Omnia, and this brand was also based on the warmth and togetherness of the family. Later the communication was lead by the colour, the coffee meant the same things as red: fire, strong emotions, passion. Magic, tales and adventure always accompanied it. At this point the slogan was: „It enraptures all your senses.” Today, dynamic is the keyword again, the slogan: „The dynamic of every-day.”

The Eduscho De Luxe is a young brand. The coffee in the golden-brown packaging is very strong and also elegant – it suits the earlier communication of the Eduscho cover brand. There were three keywords at the introduction of the product: characteristic, aromatic and dark. The slogan was: „Aromatic, unforgettable dark with a characteristic taste.” Dark coffee gives you power, courage and fills with energy. The present slogan: „The real power of darkness.”

The advert films of Jacobs Krönung are all about temptation, indulgence and romanticism. This is the coffee to bring us together. The slogan of the 90s: „An intimate aroma moment.” Later the royal experience was highlighted. At the moment the central element is the irresistible appeal. The slogan: „The appeal of the aroma.”

The Jacobs Merido Mocca was originally identified with the mornings, later it moved to the every-day. The stimulant effect of the coffee was communicated. From 2003 the name of the product was changed to Jacobs Merido Aroma. This is a change introduced at international level. The focal point of the communication is the aroma, which is reinforced by the new name. The advert films divert the attention to the prize games. This newly positioned brand is special, valuable, it is like a gem – it has to be feared for, protected, kept safe and guarded.

The adverts of Nescafé are proven to be the smartest, the most creative. The international adverts were well adapted in Hungary. In the 90s the stories were about meetings, the reoccurring moments, the dear ones reappearing in our life. The drinking of this coffee meant connections without borders, the joy of meeting each other again. Nescafé warmed us up, brought us together and cheered us. Later the winnable prizes, such as apartments were the focus of the adverts. The slogan was for years: „My apartment, my Nescafé.” In the last years the base slogan was: „The taste that starts you up.” To this end, the individual campaign slogans connected. The adverts are full of ideas, creative, humorous, young and are full of dynamics, life and outrageousness.

The slogan of Tchibo is constant: „The most that can be given.” The stories changed though: at first, it was a coffee for occasions; the important family events were in focus. Later the road from the coffee plant to the packaged coffee was shown. Next from the cover brand they changed to advertising the individual products, exclusivity and elegance were carried on with Tchibo Exclusive and Tchibo Exclusive Mild, the Tchibo Family was more for the family and prizes. In the advert films of Tchibo Exclusive, the coffee plantation is still shown, the black women, the red berries, the coffee beans and the typical Tchibo sack. The thought around the brand is: exotic, excellent quality, perfection, freshness, individuality, speciality, elegance and passion.

Based on these coffee adverts, I identified the pictures, basic thoughts, messages, keywords and the transfer people. I grouped the Hungarian coffee adverts according to different aspects. I formed groups in respect of the advert messages. To the different promotion types I assigned examples from the Hungarian coffee promotions (e.g. product samples, discount packages, rewards, prizes, privilege prizes). In Hungary, promotions including a prize draw are the most common; therefore I also grouped the different offers connected to the brands by the prizes to be won. I assigned the prizes of the Hungarian coffee promotions to the model of A. Feichtiger-Tassul (racehorse, sheep dog, sparrow, butterfly). I also separated the coffee adverts by means of Muray's need-circles. We can assign coffee adverts to the following need-circles: desire for success, individuality, sexuality, joy of senses, exhibitionism, playfulness, search for social connections, self indulgence, desire of support and care. I also created groups based on the pictures used in coffee adverts.

I separately examined the significance of colours in the case of coffees. After reviewing the meaning of the different colours I formed groups from the coffee adverts (mainly press adverts) based on their dominant colour, decoding the symbolic messages of the adverts. I compared this with the colours used in the packaging of the coffees, from which aspect I also created groups. I examined the colours used on the packaging together with the strength of the coffee and realised that the coffee distributors are consciously building on the result of the classic

advert psychology experiment. The point of this experiment is that the people taking part were served coffee from different coloured coffee pots, but all the pots contained the same coffee. The result was unambiguously proven, i.e. the coffee from the red pot was judged by the participants as strong and aromatic, from the brown pot too strong, from the blue pot too weak and the one from the yellow basically tasteless. The coffee companies dress their product due to their strength. I examined the colours on the packaging of cappuccinos separately and grouped them.

Based on the visual and verbal elements of coffee adverts I discovered the brand positioning connections. I realised that the differences between the brands can only be shown with the help of the verbal message items. The general effect mechanism of the colour psychology is taken into account during the creation of the coffee packaging.

3.4. The adaptation of the Shepherd food consumer's and - buyer's behaviour model to the Hungarian coffee market

I adapted the Shepherd food consumer's and - buyer's behaviour model to the Hungarian coffee market. From the attributes of food the physiological effects are – in case of coffee – the 'keeping awake' effect and coffee being a „dope” role. From the observation by senses whilst consuming the focus is on taste, which depends on the individual and is a subjective issue, since some can only imagine coffee without milk and sugar, but others really need sweetener or flavouring. For one person the taste of black coffee is the real joy, for the other cappuccino and its froth create the magic. The role of the scenery is eminent, because it can lead directly to consumption. In the coffee shops they pay special attention to this scenery since the choice of service is to suit the type of coffee, that means the cup or glass that is used. In the case of coffee not only the cup of coffee is the product but the packaged items in the shops too. The colour of the packaging, the pictures, motifs, the placement on the shelves, are all sensed by our eyes, they belong to the scenery. In this case the aroma is very important as well, since first we sense the smell and only afterwards we can taste the coffee directly.

From the factors that have an effect on the individual, caffeine's effect belongs to the biological factors. We are all different and we react to caffeine in different ways. That is why there are people who can drink coffee in the evening and still sleep soundly and others who have a problem sleeping when they drink a coffee in the afternoon. Some are still sleepy after the fifth cup of coffee, their body is used to caffeine. The development of this dependency is dangerous, because quitting can cause negative withdrawal symptoms. Tannin can also show different effects on people. There are some who cannot drink coffee specifically because of the tannin. To delay the absorption of caffeine we can add milk to the coffee, to bind the

tannin we can add some cream or eat a biscuit. To drink a glass of water is important, because coffee has got a diuretic effect. When analysing the psychological factors, the examination should be focused on which reference group the individual person belongs, the circumstances of the consumption of coffee and the motivation for the consumption. Within the social-demographic factors the social status of the individual person is the subject of examination because it has a great influence on his financial possibilities. The place of living defines the way of life and the age defines the lifestyle.

One of the environmental factors is the cultural environment. Because of its regional location Hungary is exposed to many effects, in respect of coffee consumption the Italian and Viennese coffee culture are determinative. The Italians prepare their stronger coffee from Robusta beans. The Robusta contains more caffeine, has a more characteristic taste, and the darker, 'Italian style' roasting hides the faults of the coffee. To make cappuccino, they add frothy milk. The Viennese coffee culture prefers the Arabica beans, which contains less caffeine and has a milder taste. The roasting at a lower temperature – that is called Viennese roasting – preserves more acidity, for the typical Arabica taste. This coffee is flavoured with milk, cream or whipped cream. From the characteristics of the economical environment the lower living standards compared to Western Europe have to be emphasised, less free time and a speeded up life style. Within the marketing environment the flooded market and the strong competition have to be mentioned. The companies try to preserve their market positions by product innovations, they target new segments and try to influence and change the consumers' behaviour.

The attributes of food, the factors that have an effect on the individual and the environmental factors all effect the decision making process. First the need shows, in the case of coffee for example it can be sleepiness, which leads to drinking coffee. Another kind of need can be when the supply runs out at home, which means that we have to go to the shop and buy some more coffee. The cup of coffee and the package are separated again for examination. Next step is the collection of information. With coffee, quality parameters are the amount of caffeine, acidity, the corpulence and the taste. We also have to be informed about price, packaging and the brand. When evaluating we qualify the individual coffee brands and then comes the last step, the buying of the coffee itself.

I also analysed the consumers' behaviour in the case of coffee based on the Kotler grouping.

3.5. Hungarian coffee consumption habits

The average coffee consumption in Hungary is 2.7-2.8 kg / person / year. This is nearly three times the world average, since the population of the world is just above 6.2 billion and the yearly coffee consumption is about 6.2-6.3 million tonnes. In the world the average use of coffee per year is 1 kg. Whilst Hungary's population is only 0.16% of the world's, our share of coffee consumption is 0.43-0.44%.

Coffee consumption is unevenly distributed in the world, since only about third of the world's population drink coffee. There are regions where the yearly use of coffee is 12 kg / person. The Hungarian share is rather lower in Europe but compared to the world it is high.

I collected the positive and negative effects caffeine has on the human body.

Hungary is typically a ground-roasted coffee consuming country. The ground-roasted coffee has kept its leading position, but in the last decades the market of instant coffees started to show rapid development. The ground-roasted coffees belong to the classic way of drinking coffee, with them we spend time drinking it, we enjoy the relaxing minutes of preparing and consuming. Drinking coffee means switching off. The instant coffees are the „tools” of quick and practical coffee drinking. The aim of the product development was to create a coffee that is quick to prepare. Cappuccino is marked by being quick to prepare and indulging. It is not consumed for its coffee content, but for its taste. Cappuccino actually means drinking coffee as a desert.

In case of ground-roasted coffees the main motivation to drink them is the galvanisation and the quality, but with the instant products the highlight is on the pleasure, comfortability and quickness.

In the year 2005 real roasted coffee meant 75% in quantity of the total coffee market. Their share in value was only 58%. Although the quantity share of instant coffee was only 20% in the same year, their value share reached 39% due to the quick spread of the 3in1 products. The weight of the coffee mixtures is the least they took 5% of the quantity and only 3% of the value of the market. This low share of the coffee mixtures can be explained by the „switching one category higher”, since its consumers, due to the lower prices, changed to the cheaper private label and other cheaper coffees in the last few years. Coffee mixtures are cheap, which means that their share of value is even lower on the total market than their share of the quantity. The value share of the instant coffees is considerably higher than their quantity share, because to make one cup of coffee you need 8 grams of roasted-ground coffee, when using instant coffee you only need 2 grams. (But to make instant coffee specialities 12.5 grams of powder is necessary.) The instant coffees, and within those the novelties – at the moment the

3in1 – always represent a higher added value, that is acknowledged by the consumers in the price.

Companies keep up a strong brand-building practice in the market of ground-roasted coffee, and the positive image of the brand is carried over to the instant coffee market. Due to this the quantity share of the private label on the ground-roasted coffee market was only 5-6% in the previous years. After joining the EU the competition strengthened, and it caused the increase of the private labels in the quantity share to 10%, in value to 9.5%. In the instant coffee market the commercial brands hold 11% of the quantity and 10.5% of the value share. The highest share was always in the market of coffee mixtures; at the moment it is 25%.

The ground-roasted coffee market is highly concentrated; in 2002 7 brands represented 82% of the market. On the Hungarian coffee market from the year 2000 prices started to sink, and due to that, the phenomenon of “switching one class higher” could be observed, i.e. the premium category got stronger, the consumers switched from the cheap products to the medium category and instead of coffee mixtures they bought cheap commercial brand products.

Analysing the marketing factors affecting the increase in coffee consumption the rise of standard of living is important with this product, since coffee becomes less and less a luxury item. During the product innovation companies introduce new products, discover new fields of use and expand the choice of taste. On the flooded market the competition is strong, that caused a small price increase on the Hungarian coffee market during the over-demand on the world market. Apart from the product, sales contain the selling of the service too. The coffee house culture is resuscitated, drinking coffee in a coffee shop represents a new style, a new feel of life. Nowadays consumption outside the home is increasing. Because of the strong competition the companies keep up an intense advertising campaign, they try to introduce their new products to a broad spectrum of consumers, and they try to keep the notoriety of the products already on the market. The impulse products, such as the 3in1 are offered in a special display at the cash desks.

The trends prevalent in food consumption habits are affecting and changing coffee consumption habits too. The sweeping world, the fast paced life favours those products that are quick to prepare. Parallel to the increasing role of eating out the coffee house culture has been resuscitated as well; the phenomenon of hedonism gets stronger. With the appearance of shopping centres people prefer more comfortable and enjoyable ways of shopping, which increases the sale of the bigger, more economical packages of coffee. The health consciousness does not only show in drinking less coffee a day or taking it with cream or milk, but also in the consumption of coffee with no, or reduced, caffeine. Also the change from coffee to cappuccino in the afternoon can be observed; young people also prefer

cappuccino or 3in1. The market share of the 3in1 comfort product has increased considerably since the introduction of the product.

The factors affecting the food consumer's behaviour from the demand side can be grouped by Lehotka as follows: biological factors, economic and demographic factors, psychological factors, social and sociological, cultural and anthropological factors. From the biological ones in the case of coffee the role of perception is decisive, within this the tasting, smelling and seeing. While analysing the economic and demographic factors I looked into the Engel law, the problem of coffee-coffee drinking, the charges put on coffee (customs, fees, taxes) and their changes and the ratio of the black market in the 90s. I made some calculations regarding the price flexibility of coffee, and checked income elasticity. In regard to the demographic factors, the decrease in the population of Hungary and the aging of the society are typical. From the psychological factors the motivation has primary importance. Because of the pleasure value of coffee the pleasure motivations are fulfilled, and the instant coffees satisfy the comfort motivations. The consumption of certain types and brands of coffee add to the analogy of a social group, they mean prestige motivation as well. Finally the consumption of coffee also means self-realization. In connection with the social, sociological factors the affects of the reference groups and the role of the family members in the decision of buying coffee are of importance. From the cultural and anthropological factors the highlight is on the dominance of the individualistic culture in Hungary. Our country, because of its regional position, is affected from several directions, which has had an influence on our consumption habits for centuries. The empathy towards the different cultures helps the acceptance of that culture's products and consumption habits.

3.6. My primary research projects regarding the Hungarian coffee consumption habits

In 2001, as a test inquiry I completed some quantitative research (with a questionnaire) examining the Hungarian coffee consumption habits.

In 2004 I did my qualitative research (half structured deep interviews) within the Hungarian coffee consumers. I was primarily interested in the changes of the coffee consumption habits, its present parameters, motivations, the factors affecting the purchase of coffee and the attitudes towards adverts. During these examinations I created tendency of the coffee consumption, and described the typical characteristics.

In 2004 I completed one more qualitative survey, for my analysis I used the repertoire-grid technique.

The base for the countrywide inquiry was the testing from 2001 and the qualitative research of 2004; the test inquiry of this was done in May 2005, the complete one in two steps in June and September 2005. The size of the sample was 868 people, the method of sampling by quotes. Based on the KSH (Central Office of Statistics) rating from the seven regions of Hungary I chose the locations, and I also made inquiries in Budapest. In the individual areas I formed quotes based on the demographic parameters.

The results of the research: The most popular brands of coffee on the Hungarian market are Nescafé, Douwe Egberts and Tchibo. The interviewees drink first of all espresso coffee which is of course prepared by brewing. Cappuccino came second, and then long coffee that is also made by usage of filter coffee today. 76.3% of the people asked sweeten their black coffee with sugar; with cappuccino this ratio is only 42.7%. This is due to the fact that cappuccino is consumed by a lesser number of people, and that cappuccino usually already contains sugar. To taste the coffee, milk is usually used, and 19.6% do not add any flavouring to their coffee. The use of whipped cream and cream are also of importance, coffee cream powder, milk powder and condensed milk are less used.

The Hungarian coffee consumers drink in average two cups of coffee a day. The hard coffee drinkers take their first cup right after getting up, espresso is the drink of the waking moments. The occasional coffee drinkers choosing cappuccino usually enjoy their hot delicacy after lunch. Within the motivations of the hard coffee drinkers first comes the habit, then helping the waking process in the morning and the affect of keeping them awake during the day. The ones drinking 1-2 cups of coffee a day usually choose the black liquid for its pleasant taste and aroma. For those who drink coffee rather rarely the decisive motivation is the pleasant taste, aroma, the indulgency, relaxation, turning off, family and friends.

The most frequent location for drinking coffee is home, to which in case of espresso their work place is added, for the ones drinking cappuccino, college or university is a supplementary site.

Women mostly buy the coffee. From amongst the package sizes of the ground-roasted coffee most popular is the 250g, but thanks to the shopping centres and hypermarkets the share of the 1000g package is significant too. From the real instant coffees people buy mostly the 100g jars. From the category of the cappuccinos and 3in1 coffees the economical bags are preferred.

From the ground-roasted coffees the most popular is the Douwe Egberts Omnia. People also like the Tchibo Exclusive, the Tchibo Family, the Douwe Egberts Karaván and the Jacobs Krönung. In the field of instant coffees the leader is by far Nescafé Classic. From the cappuccinos the favourites are the La Festa and the Nescafé.

Coffee is typically bought weekly in the food shops, but the importance of the hypermarkets is increasing. There is a stratum, that buys coffee when they do their monthly shopping in the hypermarkets. Most people spend monthly 500-1,500 HUF on coffee for their own consumption.

Very few of the people interviewed like adverts; that includes coffee adverts as well. Most popular are the adverts of Nescafé, then the ones of Tchibo. But the spontaneous mentioning does not reach 10% with any advert. The knowledge of the slogan is way ahead with Tchibo, next is Nescafé. In regard of brand advantage placement, people could judge this best about Douwe Egberts Omnia, Nescafé and Tchibo. The interviewees had much more knowledge about the colours of the packaging. The highest ratio is with reference to Douwe Egberts Omnia and Douwe Egberts Karaván. More than a tenth of the interviewed have already participated in some kind of coffee promotion, some of them more than once. 3% of them have won in prize promotions, this ratio is due to the fact, that the number of smaller prizes have significantly increased in these promotions.

I analysed the coffee consumption habits together with the general consumption habits; also the frequency of visiting restaurants and coffee shops in relation to life style, life mode, and the coffee consumed there too. I asked questions regarding the general media usage.

Based on the coffee consumption habits I formed 6 clusters. These are the following: moderns, innovators, the ones „living with a limited passion”, „small consumers”, traditionalists and hard coffee drinkers. Analysing the coffee consumption habits together with the general ones, I was able to form the following clusters: moderns, health-conscious, ones living an unhealthy life, „half-converted”, traditionalists and „light consumers”. It may be stated, that the overlapping of the groups of coffee consumption habits and general consumption habits is not perfect, only the two groups of extremes cover during the two examinations. To describe the groups of the general consumption habits, the demographic parameters are a little insufficient, the media usage habits are more typical, but best fitting is the life style analysis. The groups of the coffee consumption habits can be better described with the demographic parameters, but decisive factors are the age and consequently the life style.

Of the factors affecting the decisions relevant to buying coffee outstanding are the nice taste, pleasant aroma and smell. I formed 5 factors from these parameters: „innovator factor”, „existential factor”, „pleasure factor”, „comfort factor” and „conservative factor”. Based upon these, I identified 4 segments of consumers: the price-conscious, the hedonists, the „marketing-sensitives” and the „forever pessimists”.

4. NEW SCIENTIFIC FINDINGS

1. I discovered the different characteristics of coffee as the product and coffee drinking as the service; I adapted the product-service continuum to the process of coffee-coffee drinking. I identified the areas of competition based on the significant advantages of the product and appointed the competitors of the individual types of coffee in the separate market segments. I described the life cycles at brand level regarding the different coffee markets and adapted the product hierarchy to the Hungarian coffee market.
2. I allocated the brand positioning connections based on the visual and verbal items of coffee adverts, further I described that the brand differentials based on the sensual affects and the associations connected to these.
3. Analysing the functions of the packaging, I realised that the coffee brands build their package on the general effect mechanism of the psychology of colours. The differences between brands are palpable first of all due to the verbal message items. This is what was proven by my analysis of the slogans.
4. I discovered the factors affecting the Hungarian coffee consumption habits using the Shepherd model, the Kotler and the Lehota grouping; separately I described the marketing factors that influence these habits, further I identified the manifestation of the changes in the consumers' habits on the Hungarian coffee market.
5. I formed the tendency of the coffee consumption and the typical characteristics regarding the Hungarian coffee market; I revealed the segments of coffee consumption and the clusters based on the general consumption habits, further more I compared the clusters of the general and the coffee consumers. I allocated the factors affecting the decisions on buying coffee and formed segments within the coffee buyers.

5. CONCLUSIONS AND SUGGESTIONS

The Hungarian coffee market is a typical *oligopoly market* with four big participants. These multinational companies came to Hungary after the change of regime. On a *mature coffee market* there is *strong competition*, thanks to this there are *continuous special offers*, keen prices; and the delayed carry-over effect of the world market. Companies keep up a *strong brand building* practice, and due to this the ratio of the private label within the ground-roasted and instant coffee market is below average. They carry the already existing *positive brand image* from the ground-roasted coffee over to the instant coffee market. The companies use cover brands during brand building. On the Hungarian coffee market most of the products are in their mature phase, the new, innovative products are in the introductory or growing stage. Mostly in the market of the cappuccinos can be observed the undulating change of the product life-curve with the creation of new names and tastes.

The Hungarian coffee market is changing, in harmony with the changes in the general consumption habits. The habits of coffee consumption show the following trends: in the *sweeping world* of our age, according to our accelerated life style, we would like to minimize the time spent running the household and being in the kitchen. This is aided by multifunctional, easily handled kitchen equipment and those products that are easy to prepare. On the coffee market this was done by the introduction of *instant coffees*, later the birth and spread of the instant specialities, the 3in1 products and tinned coffee. The producers adapt to the change in consumption habits, but more and more it can be observed that the companies anticipate the consumers' needs and try to meet them commencing product innovations following a *push strategy*.

The companies first of all target the *young people* with their *innovations*; they want their new product to be dynamic, youthful and also novel. Besides vivifying, the highlight is on *pampering*. From the psychological factors the *joy and comfort motivations* are growing significantly. The coffee distributors are also *positioning their products by use of the material and colour of the packaging*. They try to reach their young target group with lively colours. The packaging of the innovative products are regularly renewed, by the time the product reaches its mature stage it uses its third look. The new versions stress *the youthfulness and dynamic of the brand*; also softer and washed away lines are typical. Alongside this the traditional brands are renewing as well, the conventional visual items are disappearing or changing. The brands that have been on the market longer are *rejuvenated*: they do this with the open intent that they can win a new group of consumers, namely the young people. All this should be done whilst keeping the old consumers.

The people try to minimize the time spent in the household also by *eating out*, which is becoming more important these days. In parallel consumers prefer the *more comfortable and enjoyable ways of shopping*, which is due to the appearance and spread of shopping centres. The spread of the new types of shopping also appears in shopping for coffee too, the ratio of the 1000g packages of ground-roasted coffee is growing; also the role of buying coffee when doing the big monthly shopping is increasing. In the case of coffee, the *cycle of repeated shopping* is short, which means that the *product has to be advertised often*.

There is no month without a new advert spot. At times of advert booms, they advertise as many as five brands in parallel on *television*. The *giant posters* and *city lights* are supplementary media. Nescafé often uses *vehicle adverts*, in connection with their new products they prepare puzzles, making people aware of the name. On the Internet, besides the answers, there are more riddles and games waiting. Because the inducement comes from more directions, we record the brand more strongly. The *reputation of a brand* can be improved with vehicle adverts. One of the creative solutions is „wrapping” buildings that are being renovated, in adverts.

Besides the new shopping habits, new directions are becoming apparent within eating habits. *Coffee shops came to life again*; modern young people are one of the target groups. This is the stratum that spends too much on entertainment, on *enjoying life*, they can be called hedonists. When the focus moves from the coffee to the drinking of coffee, service becomes highlighted, and the ratio spent on coffee-coffee drinking grows in comparison to income. This means that the Engel-law prevails only limitedly.

A typical characteristic of our age is the *growing importance of health consciousness*. This also shows on the Hungarian coffee market in the change of the consumers' habits. Nowadays people drink less and weaker coffee, taste their coffee with milk and cream which slows down the absorption of caffeine and binds the tannin. Many have changed to drinking cappuccino, or take this instead of their afternoon espresso. Young people first meet coffee drinking cappuccino or 3in1 products. 3in1 is a comfort product as it satisfies the need for pampering and represents a higher added value. Besides the caffeine free coffees those with reduced caffeine content also appeared on the ground-roasted coffee market.

From the demographic factors the *age* is a decisive *target group segmentation factor*, today the *way of living*, the *life style* are much more determinative, with their help we can form consumer segments. Analysing the coffee consumption habits together with the general ones, we could form six clusters: moderns, health-conscious, ones living an unhealthy life, „half-converted”, traditionalists and „light consumers”. To determinate these groups, the demographic factors are only slightly suitable; the habits in the use of media are more typical, but best is the analysis of life style. *Based on the coffee consumption habits* we could separate *six clusters*: moderns, innovators, the ones „living with a limited passion”, „small consumers”, traditionalists and hard coffee drinkers. For the determination of these groups, the demographic factors are more suitable, but age is decisive. In the future life style will become more determinative, of this age it is an important part.

The *decisions on buying coffee* are determined by the „innovator factor”, „existential factor”, „pleasure factor”, „comfort factor” and „conservative factor”. Based on buying coffee, the following segments can be identified: the price-conscious, the hedonists, the „marketing-sensitives” and the „forever pessimists”.

6. PUBLICATIONS REGARDING THE TOPIC OF THE DISSERTATION

Articles in vet scientific periodicals:

Foreign language:

1. **Letenyei Krisztina** (2006): The product life cycles of the Hungarian coffee market. *Gazdálkodás*, L (16) ISSN 0046-5518 (being published)
2. **Letenyei Krisztina** – Dr. Papp János Ph.D. (2006): The appearance of the changings of the consumer habits in the coffee drinking in Hungary. *Szent István Bulletin* 2006/1 ISSN 1586-4502 (being published)

Hungarian language:

1. **Letenyei Krisztina** – Dr. Papp János Ph.D. (2005): The changes in the Hungarian coffee consumption. *The hungarian journal of food, nutrition and marketing*, II (1) 25-33. pp., ISSN 1786-3422
2. **Letenyei Krisztina** – Dr. Papp János Ph.D. (2005): The typical characteristics and competition areas of the coffee as a product and the coffee drinking as a service. *Marketing & Menedzsment*, XXXIX (2) 49-58. pp., ISSN 1219-03-49
3. **Letenyei Krisztina** – Dr. Papp János Ph.D. (2005): The building of coffee brands with the help of communication tools. *Marketing & Menedzsment*, XXXIX (3) 45-51. pp., ISSN 1219-03-49
4. **Letenyei Krisztina** (2005): The slogans of the coffee brands and their changes, the basic ideas and marketing communication arguments in connection. *Marketing & Menedzsment*, XXXIX (4-5) 145-153. pp., ISSN 1219-03-49
5. **Letenyei Krisztina** (2005): The Hungarian and the world market of coffee. *Gazdálkodás*, XLIX (5) 46-53. pp., ISSN 0046-5518

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1. **Letenyei Krisztina** (2005): Processing of coffee – making of coffee. *Édesipar*, LI (2) 2-5. pp., ISSN 0013-0842
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6. **Letenyei Krisztina** (2005): The greatest participants of the Hungarian coffee market. *Édesipar*, LI (4) 6-11. pp., ISSN 0013-0842
7. **Letenyei Krisztina** (2005): The North-European and the Hungarian coffee consumption habits. *Édesipar*, LI (4) 12-15. pp., ISSN 0013-0842

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9. **Letenyei Krisztina** (2006): The coffee on the market of caffeine competition. *Édesipar*, LII (1) ISSN 0013-0842 (being published)
10. **Letenyei Krisztina** (2006): The factors affecting the coffee consumers' behaviour and their analysis. *Édesipar*, LII (1) ISSN 0013-0842 (being published)
11. **Letenyei Krisztina** (2006): The examination of the coffee consumption habits within the primary research. *Édesipar*, LII (2) ISSN 0013-0842 (being published)
12. **Letenyei Krisztina** (2006): Promotional tools on the Hungarian coffee market. *Édesipar*, LII (2) ISSN 0013-0842 (being published)

Articles published in conference issues:

Foreign language:

1. **Letenyei Krisztina** (2002): Die komparative Analyse der ungarischen Kaffeewerbungen, 2nd International Conference for Young Researches of Economics, Gödöllő, 17-18th Oct. 2002, I. volume, 213-217. pp., ISBN: 963 9483 05 2ö, ISBN: 963 9483 06 0
2. **Letenyei Krisztina** (2002): Kreativität – Gruppierung der Kaffeewerbungen nach mehreren Aspekten, 2nd International Conference for Young Researches of Economics, Gödöllő, 17-18th Oct. 2002, I. volume, 218-222. pp., ISBN: 963 9483 05 2ö, ISBN: 963 9483 06 0

Hungarian language:

1. **Letenyei Krisztina** (2002): Coffee consumption habits in Hungary, VIII. International Agrarian Economical Scientific Days, Gyöngyös, 26-27th March 2002, II. volume: The economy of the agricultural production and resource management, 304-309. pp., ISBN: 963 9256 75 7ö, ISBN: 963 9256 77 3
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3. **Letenyei Krisztina** (2002): The comparative analysis of the Hungarian coffee adverts, XLIV. Georgicon Days, Stability and institution system in the agriculture scientific conference, Keszthely, 26-27th Sept. 2002, VTCD GN 20020926, IFPI 3405
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7. SUMMARY

Coffee is one of the most popular commodities in the world. In Hungary, after white bread, coffee has the second highest consumption amongst foods. The importance of this product category drove me to choose this as the subject with which to analyse the habits of the Hungarian consumers.

I would like to highlight as the target of my work the review of those factors having an influence on the habits of coffee consumption, to define the direction of change in these habits, and the visible trends of the general consumer habits within the Hungarian market. The segmentation, was facilitated by primary research, based upon consumption habits in general and therein the habits of coffee consumption in particular, furthering the definition that the factors and clusters regarding coffee purchase are of primary importance.

The base for my analysis was the research of the macro-environment of coffee, using the STEPED analysis method. The review of the cyclic movement of the price of coffee on the world market, the history and main events in the life of coffee distributors was connected to the discovery of secondary sources and processing their data. To familiarise you with the background, I made an overview of the literature with reference to consumer habits and marketing communication. As the next step, I adapted the food consumer's behaviour models and the models on factors affecting the demand on the Hungarian coffee market.

After completing the fundamental primary research, using the findings I moved to the surveying of a vast number of consumers, which helped me to identify the characteristics of the Hungarian coffee consumption habits. The changes and trends in the general consumers' habits are perfectly shown in the new directions of these habits in coffee consumption. First I identified the tendency of the coffee consumption and the typical characteristics of the Hungarian coffee drinkers, from which I formed clusters. After analysing the deciding factors of buying coffee based also on the survey, I discovered the relevant factors and described the different groups.

In line with the research into the habits, I completed my analysis based on integrated marketing communication. Reviewing the different guises of coffee as the product I identified its competitors within the market sector and adapted the product hierarchy to the Hungarian coffee market. I revealed the connection between coffee as the product, and coffee drinking as the service. I also defined the life cycles of branches within the coffee markets. After analysing the functions of packaging, I studied the decisive role of colours on coffee packaging from the aspect of advertisement psychology, including the practical realization based on classic experiments. I formed groups from the coffee adverts by colours, pictures, messages and slogans, then analysed these slogans. As the result of this I opened up the basic connection of the supplement of marketing communication tools as the basis for creating messages. With the help of these results, I was able to provide scientifically established starting points for building creative strategies.