The Evolving Nature of Branding: Consumer and Managerial Considerations

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EXECUTIVE SUMMARY

This paper is primarily a review of the brand literature and has two aims. The first is to bring together two separate streams of literature: (1) the literature about brand concepts developed by management and (2) the literature about brand images developed by consumers. Doing so clarifies the nature of the dual processes of corporations creating and communicating brand concepts to consumers who then form brand images in memory. The second aim is to examine the dynamic nature of brands in terms of changing brand strategy and increasing consumer sophistication.

To achieve these aims, the paper describes the evolution of brand concepts and images in terms of six stages suggested by Goodyear (1996). The first four stages represent the traditional classic marketing approach to branding; the last two represent the post- modern approach to branding.

The Goodyear model was chosen because its conceptual nature. It indicates the possibilities available to any brand over time. From examining the marketplace, it is clear that not all brands will go through all stages. Nevertheless, the model is useful because it focuses strongly on the need to respond to changes among customers. In doing so, it emphasizes the importance of two-way communication with consumers.

The model was also chosen because it is more flexible in explaining: the differences in branding strategies across firms in a product category, the differences in branding the same product across international markets and the evolving nature of brands over time. Changes in branding are related to: the expertise of management, the firm's strategic goals and market targeting activities, the branding activities of other firms, the sophistication of consumers, the level of involvement in the product category, the stage of the product life cycle and the development of branding in the relevant product category.

This paper extends Goodyear's conceptual model of brand evolution by relating each stage to the learning and valuing processes that consumers engage in. Finally, the paper concludes with by recognizing that the evolutionary model requires substantial empirical support and thus, there is a need for further research.

Stage 1: Unbranded Goods
In the first stage, goods are treated as commodities and most are unbranded. This stage is usually characterized by an excess of demand over supply. It is most closely approximated by developing economies and the former soviet block countries, and is rarely seen in developed economies. Producers make little effort to distinguish/brand their goods with the result that the consumer's perception of goods is utilitarian.

Stage 2: Brand as Reference
In the second stage, competitive pressures stimulate producers to differentiate their goods from the output of other manufacturers. Differentiation is achieved primarily through changes in physical product attributes (gets clothes cleaner). Consumers' memory networks expand beyond recognition of the basic product category to include other product information in order to evaluate goods on the bases of consistency and quality. They begin to use brand names based on their image of the brand as a heuristic device in decision making. Even so, consumers primarily value brands for their

utilitarian value. Utilitarian values are described by Csikszentmihalyi & Rochberg-Halton as instrumental because they enable consumers to reach certain ends and as enjoyment which is pleasure derived from owning or using the object.

Stage 3: Brand as Personality

By this stage, differentiation among brands on rational/functional attributes becomes exceedingly difficult as many producers make the same claim. Therefore, marketers begin to give their brands personalities. An example is Ivory soap. By creating the personality of the caring mother, the marketer injects emotion into the consumer's learning and valuing process. Doing so brings the brand closer to the consumer through an emotional bond as mothers who want to perceived as caring, use Ivory soap.

In the previous two stages, there was a distinction between the consumer and the brand. The brand was an object at some distance and was removed from the consumer. Incorporation of personal characteristics into the brand makes it more appealing to consumers who are more likely to affiliate with brands possessing desirable personalities. Thus, the personalities of the consumer and the brand begin to merge and the value of the brand has become self-expression.

Social constructionism explains the symbolic nature of brands. All individuals share in a process of transmitting, reproducing and transforming the social meaning of objects. As consumers, individuals within a social group interpret marketer-sponsored information such as advertising and use brands to send signals to others about themselves. Other individuals interpret these signals to form images of and attitudes toward the brand's user. If the user does not get the anticipated reaction, he or she may re-consider use of the brand. This process of decoding the meaning and value of brands and using brands correctly is *active* involvement of the consumer in the brand's image.

Products and brands are used by cultures to express cultural principles and establish cultural categories. Individuals can be classified on the basis of brands. For example, the affluent drive Rolls Royces and the less affluent drive Fords. When products and brands cross cultural boundaries, confusion can result as goods may not be valued for the same reasons in other cultures. Thus, the values communicated by products and brands must be consistent within the group and the culture.

Stage 4: Brand as Icon

In this stage, the brand is "owned by consumers". They have extensive knowledge about the brand – frequently world-wide-- and use it to create their self identity. An example is the Marlboro cowboy who is recognized around the world. The cowboy is rugged, a man against the odds, but he is not crude and lacking in sophistication. Consumers who want to be perceived as strong, rugged or loners might smoke Marlboro cigarettes. The cowboy is a symbol or icon of a set of values.

To be well-entrenched in the consumer's mind, the icon must have many associations—both primary (about the product) and secondary. For example, Air Jordan shoes have primary associations with Michael Jordan's athletic prowess and secondary associations with the Chicago Bulls and winning. The more associations a brand has, the greater its network in the consumer's memory and the more likely it is to be recalled. Thus, management of these brands must continually find associations that strengthen the iconic stature of their brand.

Stage 5: Brand as Company

This stage marks the change to postmodern marketing. Here, the brand has a complex identity and there are many points of contact between the consumer and the brand. Because the brand equals the company, all stakeholders must perceive the brand (company) in the same fashion. The company can no longer present one image to the media and another to stockholders or consumers. Communications from the firm must be integrated throughout all of their operations. Communication is not, however, unidirectional. It flows from the consumer to the firm as well as from the firm to the consumer so that a dialog is established between the two.

In stage five, consumers become more actively involved in the brand creation process. They are willing to interact with the product or service in order to create additional value. Examples of this are the use of ATM machines and patronage of stores such as IKEA. In the ATM example, the consumer adds value to the banking process by determining when and where the transaction will occur. Customers at IKEA are willing to be involved in the product design process by designing their own kitchen cabinets from modular units, choosing fabrics for their upholstered furniture and by transporting goods home and assembling the product themselves. This interaction strengthens the relationship that consumers feel with the firm.

Stage 6: Brand as Policy

Few companies to date have entered this stage which is distinguished by an alignment of company with ethical, social and political causes. Prime examples of this stage are The Body Shop and Benetton. Consumers commit to the firms that support the causes favored by the company by purchasing from the firm. Through their commitment, consumers are said to own the brand.

Before leaping into this stage, firms have to consider both the risks and their credibility as brand as company. The primary risk is alienating consumers who do not like the firm's stance. An example is Benetton with some of its more extreme advertising. The firm in question also has to decide whether its previous history would support their credibility as "spokes-companies" on various issues. Consumers might find it difficult to believe that Exxon is strongly pro-environment.

In stages 5 and 6, the value of brands changes. While brand values in stages 1-4 were instrumental because they helped consumers achieve certain ends, brands in stages 5 and 6 exemplify terminal values which are the end states that consumers desire. Examples of terminal values supplied by Rokeach are peace and equality.

The brand image at the end of the evolutionary process is similar to Kapferer's conceptual model of the brand. He indicates that brands have a physique, personality, culture, relationship, reflection and consumer's self image. No brand can incorporate all of these facets without having traveled through the six stages.

CONCLUSION

This paper makes a number of contributions to the literature. First, it shows how a practitioner-developed model such as the one posed by Goodyear has practical value. Second, it provides a basis for grounding the practitioner model with different streams of literature that indicate its appropriateness. Third, the paper adds to knowledge by showing that while the other models enable us to understand brand development, use of the Goodyear model provides a better understanding of possible brand evolution routes. Fourth, the model enables brand marketers to appreciate the dynamics of competition and develop stronger strategies for their brands. Finally, the paper suggests avenues for further research to better understand the brand evolution process.

It is highly unlikely that all companies will choose to push their brand concepts throughout all six stages of brand evolution. Firms are free to choose the "final stage" for their brand. For most firms, stages three or four will probably be the apex of their brand development. Stages 5 and 6 may be perceived as too risky.

New brands can enter the market at any stage of development so long as other brands have laid a groundwork of consumer understanding to support the understanding of the new brand. For example, if brands in a category have reached the icon stage, a new brand could enter as brand as company or policy. Such would be the case of Saturn. A new brand, however, cannot enter as brand as company if all previous brands are simply brand as reference. The gap between the brands as reference and company stages requires the consumer to jump several levels of understanding without the necessary intervening information in memory. Consumers must think of brands as forms of self-expression before they can perceive them as entities they want to commit to in order to reach their terminal value states.

The last two stages represent the future for brands. But these stages are not well understood. Research is necessary to understand the managerial challenges and corporate rewards from these stages. Examples of questions that need to be addresssed are: To what extent are consumers willing to co-design and co-deliver value with suppliers? How forgiving will consumers be when problems occur in the co-development of services? Do staff perceive the involvement of consumers as threats? Are consumers willing to pay a premium for the brand as policy?

THE EVOLVING NATURE OF BRANDING: CONSUMER AND MANAGERIAL CONSIDERATIONS

Creating, developing, implementing and maintaining successful brands is frequently at the heart of marketing strategy. Successful branding requires a strategic perspective (de Chernatony 1998) whereby strong brand concepts are presented and communicated to well targeted segments resulting in favorable brand images which reflect the brand's identity (Gardner and Levy 1955, Reynolds and Gutman 1984, Kapferer 1997).

One could look at the processes involved in successful branding from two perspectives-- those under the control of management (e.g. developing a vision and brand values) and those controlled by consumers (e.g. forming associations, images and perceiving usage situations). There is a sequential process interlinking brand managers with brand consumers in so far as activities and information from the corporate side feeds into the consumer market, initiating a decoding, interpretive and responding process. This is funneled back into the corporation, ready for studying and fine tuning of brand strategy. This process has been modeled by de Chernatony and Dall'Olmo Riley (1997) and is shown in Appendix A. Both processes must synchronize for the corporation to achieve the goals it sets for its brands. While each of these processes have been researched and written about, the relationship between them has seldom been explicitly discussed in the literature. It is crucial that academics and practitioners have a good understanding of the relationship between these two processes to successfully meet the challenges of the increasingly hostile brand environment.

One aim of this review is to examine the literature about brand concepts and brand images in order to explicate the relationship of brand image formation in consumers' minds with the brand concept developments made explicit in the brand identity plans of management. Successful brand management requires both an understanding of how the brand strategy is implemented and communicated to consumers and how consumers respond to this. Evidence is mounting of the nature of brands and branding changing over time (Goodyear 1996; Kapferer 1997; Young & Rubicam 1994). Tracing the processes that shape the future nature of brands and brand activities helps management better plan for brand growth.

A second aim of this review is to examine the dynamic nature of brands in terms of changing brand strategy and increasing consumer sophistication. Today, we read that brand loyalty is declining, that brands no longer represent added value and that the importance of brands is being questioned (de Chernatony 1997). Thus, it becomes imperative to understand the brand concept and image creation processes more thoroughly in order to help brands thrive.

We open this paper by noting that managers and consumers have evolving goals for brands and that one model which clarifies how the *branding process* might evolve is Goodyear's (1996) six phase model. Our paper is then structured to review each of these progressive stages and for each one we explore how consumer behavior theory can explain consumers' growing brand appreciation and the changing approaches to brand management. As we progress through the different phases, we draw on other models to gain further insights. We conclude by indicating the value of this time driven process to management and identify areas for further research.

Relationship of Brand Concept and Image Development

Various brand typologies (e.g. de Chernatony and Dall'Olmo Riley 1997; Leahy 1994) show how brand strategists have plans for particular brand concepts whose nature is unique to the particular brand concept (Gardner and Levy, 1955). Over time these brand concepts have ranged from the brand acting as a simple identification device to the development of complex, value-laden identities. The goals managers have for their brands must mesh with those of their target consumers. The goals consumers have for brands are numerous (Gordon 1991) and include such things as communication of particular aspects of self and lifestyle through the use of specific brands (Goffman, 1959; Grubb and Hupp 1968). If managements' and consumers' goals for specific brands do not coincide, consumers would ignore or pay minimal attention to brand communications; little learning would occur and the goals of management would not be realized. Thus, the goals of the two are inextricably tied to each other.

A particularly helpful model has been devised by Goodyear (1996) showing how the nature of branding has evolved over time. This stimulated us to draw on the consumer behavior literature to understand how consumers learn about brands,

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develop their own individual roles and grow to value brands. Building on Goodyear's branding evolution model, the relationship of the brand concept with its brand image development processes is summarized in Chart 1. Each row represents a phase in branding. By showing these phases as levels that accumulate over time, the model indicates that different types of branding may occur within a product category at the same time. The chart shows the full range of possibilities from stage 1 to stage 6. It should be noted that branding may not reach all six stages in all product categories. Thus, some product categories could end after the second stage (brand as reference), third stage (brand as personality), fourth stage (brand as icon), etc. The descriptions of the branding stages are taken directly from Goodyear (1996) and denote how the concept of the brand changes over time from the earliest stage of unbranded to the ultimate stage of brand as policy. The first four stages describe the classical approach to brand marketing while the last two are in the genre of post-modernism (Brown 1995). In Charts 2A and 2B, the concomitant consumer processes of learning/adoption and valuation are summarized as "Consumer Effort: Learning and Valuing Processes denoting the time and energy expended by consumers.

Chart I
Illustration of Branding Process over Time

Stage of Branding	Time	Type of Value
Stage 6 Brand as policy		
Stage 5 Brand as company		Terminal
Stage 4 Brand as icon		Symbolic
Stage 3 Brand as personality		
Stage 2 Brand as reference		
Stage 1 Unbranded	Time = 0	Instrumental

Explanation of Branding Terms:

Unbranded: Commodities; packaged goods; major proportion of goods in non-industrialized context; minor role in Europe/USA; supplier has power

Brand as Reference: Brand name often name of maker; name used for identification; any advertising support focuses on rational attributes; name over time becomes guarantee of quality/consistency

Brand as Personality: Brand name may be "stand alone"; marketing support focuses on emotional appeal; product benefits; advertising puts grand into context

Brand as Icon: Consumer now 'owns' brand; brand taps into higher-order values of society; advertising assumes close relationship; use of symbolic brand language; often established internationally

Brand as Company: Brands have complex identities; consumer assesses them all; need to focus on corporate befits to 'diverse' consumers; integrated communication strategy essential through-the-line

Brand as Policy: Company and brands aligned to social and political issues; Consumers 'vote' on issues through companies; consumers now 'own' brands, companies and policies

Before discussing each of the stages in the Goodyear model, it is useful to describe the model in general and indicate why it was chosen as the basis for this review. The Goodyear model focuses on the evolving nature of *branding* over time rather than on the strategic design of *brand concepts* at particular times and for particular brand launches. Rather than a tracing of an actual brand over time, Goodyear's is a conceptual model of the possible stages that a brand might go through.

Chart 2
Illustration of Consumer Processes
A: Consumer Effort: Learning Process

					Commit ment
				InteractiveValue Creation	
			Adoption of Brand		
		Knowledge			
	Recognition/ Interest				
Basic Product Knowledge					

Shading indicates that learning builds over time in a product category.

B: Consumer Effort: Valuing Process

					Self-Actualization
				Relationship	
			Self Identity		
		Self-Expression			
	Differentiation/ Consistency/ Quality				
Utilitarian					

Instrumental *-- Csikszentmihalyi & Rochberg-Halton*
Symbolic Terminal *– Rokeach*
Shading indicates that brands can be associated with higher level values as branding efforts move toward stage 6.

The six stages refer to changes in branding practices in a product category over time rather than changes in any specific brand. When the product is new, companies attempt to explain what the product is, does and how it can benefit consumers; this is the stage, brand as reference, in which management tries to distinguish its brand from others using product attributes. When a brand can no longer sustain a competitive advantage on the basis of product attributes, management may decide to build a personality for the brand. As the brand becomes well-known, world-wide, it may become a symbol or icon. In post-modern marketing, the brand may be the company or align itself with social causes. Thus, in any product category, *different brands may be in any one of the six stages; brands may change strategies (for example, from reference to personality); new brands may enter at any stage and the branding process in a particular product category may never complete all six stages*. Thus, the model shows a depth of different types of brands co-existing at the same type. Some brands may be at the forefront of branding activity in the product category while others employ the same strategy that they used in the past so that they are still in the reference stage.

This flexibility of the Goodyear model enables it to account for product categories in which brands never progress beyond stages two or three and product categories in which brands progress to stages five and six. For low involvement products such as toilet paper, consumers may be unwilling to expend the effort to learn about brand personalities or invest toilet paper with symbolic attributes. In this case, branding stops at stage two or three. For higher involvement product categories such as cars, cigarettes, banks and household furnishings, consumers may be quite willing and, indeed, eager to learn more about brands and be highly receptive to forming relationships with the brand as company or brand as policy. It depends on the willingness of consumers to respond to the branding efforts of managers as well as the willingness of managers to try new branding strategies.

Besides the level of involvement, the nature of any specific brand will be a function of the strategic intent of the firm, the expertise of management, current forms of branding in the marketplace, the sophistication of consumers, the level of involvement in the product category, stage of the product life cycle and the development of branding in the product category.

Which branding strategy the firm employs depends heavily on the firm's targeting and positioning decisions. Firm XYZ may sell bags of soap to the low end of the market (highly price-conscious consumers) and P&G may sell to the mass market with Ivory. (Examples of soap brands are shown in Chart 3.) These two firms illustrate the classical marketing approach. For many sellers of brands of soap, their market segment(s) view soap as utilitarian and these consumers expect the product to make them clean, smell good or be moisturized whereas purchasers of Ivory may be willing to expand their concept of soap brands to include self expression because they want to achieve an "Ivory girl" complexion. Now enter the Body Shop which sells soap to a high end small market segment concerned about animal rights and willing to pay more. Because the soap's name is the company's name and the company's name connotes its social and political stance, it illustrates brand as company as well as policy. Thus, even in the case of a low involvement good, we find that a few consumers are willing to pay more and exert more effort in learning about and shopping for a brand that reflects their political stance if clever marketers such as Anita Roddick will take the risk in expanding the nature of soap branding beyond its perceived limits of stage two and three. Whether this would work for other low involvement goods depends on the cleverness of the marketer and the effort consumers will expend for brands in the product category.

The soap example illustrates the relationship between segmentation, targeting and positioning and branding. Various market segments will respond appropriately to different brands in the same product category—whether high or low involvement. Within the car category where examples of brand as symbol abound (Mercedes, BMW, Lexus, Cadillac, Lamborghini, Ferrari and Porsche), there are segments of consumers more interested in low-priced, limited feature Hyundais. Use of the Goodyear model helps to explain why Toyota had to name its luxury product Lexus. The Toyota brand was built primarily on utilitarian attributes—reliability, quality and dependability. When Toyota wanted to ratchet up to the luxury car stage, management created a new brand because they did not believe that consumers could stretch the concept of Toyota upward enough to include a truly luxurious car or brand as icon. At the same time, the model helps to explain GM's branding strategy. Their Chevrolet division is more utilitarian than Buick or Cadillac and even within a brand such as Chevrolet, the image of Chevrolet is stretched from the more utilitarian models to higher priced, full featured models which may be more self expressive. To reflect these differences, the various models have names indicating their position within the array of the Chevrolet brands. Thus the higher end Chevrolets may actually cross into brand as personality or self-expression. *The borders between the stages are not rigid; they are permeable so that a brand with different models may cross the border.* Crossing from one phase to another may work quite well, but straddling two phases in the same marketplace may cause confusion in the consumer's image of the brand that could be detrimental to the brand's sales success.

CHART 3
Soap Example of Branding Over Time

Stage of Branding	Brand	Brand	Brand	Brand	Brand
Policy					
Company					Body Shop
Icon					
Personality					
Reference		Coast	Dial		
Unbranded	Bags of soap Sold on price			Ivory	

Bags of soap *entered at the unbranded stage and never progressed.*
Coast and Dial *entered at the reference stage and never progressed.*
Ivory *entered as an unbranded brand, but has moved from stage 1 to 3.*
Body Shop *soap could also be said to be in stage 5, but it is placed in stage 6 because the Body Shop brand has reached stage 6.*

Saturn, which is GM's first new brand in over seventy years, is positioned as "a different kind of company, a different kind of car." What is the difference? It seems to be the relationship that Saturn strives continuously to build with its owners as demonstrated in Saturn owner rallies, trips to concerts, ballgames and bar-be-ques. Saturn stands out from the rest of the GM brand stable and Saturn owners have higher levels of satisfaction and loyalty to this car brand. The Goodyear model helps to explain the success of Saturn as it is an attempt to create a company-as-brand brand from GM. The desired output of the company as brand is a relationship and Saturn owners feel a stronger relationship with the brand than do consumers of GM's other brands.

While one might argue that not all products, especially convenience and low involvement products, can reach stages five and six, there is one type of brand, private labels, in which the company name can be used as brand as company in low involvement categories. For decades, consumers have purchased store and house brand merchandise in grocery and department stores and gas stations. In this case, the consumer has learned about the store/company and formed a brand image that is complex (covers multiple product categories) and requires multiple communications from the firm. The intent of the private label is to tie the consumer to the store or, in other words, to create a relationship with them. In this case, the image of the brand as company supersedes the level of involvement in the product category. The much-publicized case of Food Lion after the 60 Minutes expose provides an example of how damage to the company image can cost the company millions of dollars in sales.(Bussian, 1997) When consumers' faith in Food Lion was damaged by evidence indicating unethical labor and food handling practices, they refused to shop at Food Lion stores. (Bussian, 1997) The Goodyear model can be used to explain situations in which management uses different strategies for the same brand with the result that the brand is located in more than one stage. For example, a company might sell the same brand in the U.S. (a sophisticated market) and in Latin America (less developed model). In the U.S. the brand may have a strong personality, but in Latin America it might need to be differentiated from local brands through functional attributes. Thus, managers can view any brand as being in multiple stages depending on the stage of the brand life cycle in the relevant market(s).

Other branding frameworks such as that proposed by Park, Jaworski and MacInnis (1986) focus on the strategic intent of the firm. Once management chooses a brand concept such as functional or symbolic, it attempts to manage the same concept over the brand's life cycle. In their framework, brands do not shift from functional to symbolic. While this is true of some brands such as their examples of Vaseline, Clorox and Lenox, it need not be true of all brands. For example, Camel cigarettes were initially positioned on product attributes (they do not bite or parch) and sales promotions such as coupons (Golden Leaves). This is a far cry from Joe Camel—one of the best examples of brand as personality. An example of a reverse strategy is American of Martinsville which began making high-end, expensive furniture (brand as icon) and shifted to selling to motel and hotel chains (brand as reference) when the high-end market became crowded.

These two examples cannot be accounted for in the Park, Jaworski and McInnis model, but can be accomodated by the Goodyear model.

The Goodyear model also incorporates more change agents. In the Park, Jaworski and MacInnis framework, changes in the brand concept occur because of stages of the brand's life cycle. In the Goodyear model, changes occur due to competitive pressures, sophistication of management and especially consumers as well as the life cycle. Thus strategy becomes dependent on forces beyond the firm and management. Communication is no longer one-way; instead it loops from consumer/market place to the firm and back. This two-way communication is extremely important because consumer interaction with the brand and the company is a driving force in the last stages of the model. Again, the Park, Jaworski and MacInnis framework (1986) does not accommodate this feedback loop as well as the Goodyear model.
In the succeeding sections, the relationship between the marketing effort and consumer effort is described for each stage.

THE FIRST FOUR STAGES OF CLASSICAL MARKETING

Stage 1: Unbranded Goods

In developed countries this stage is usually by-passed but has more relevance to developing economies. Exceptions might be commodity goods or cases where consumers are unwilling to make brand distinctions -- for example, toothpicks or clothes pins. Even in economies where brands are not common (for example the former USSR) this stage can be short lived as consumers use surrogate cues to differentiate between supposedly unbranded goods. While a Russian consumer may not have the benefit of brand names to simplify the selection process between different tires, they learn that the codes stamped onto tires signify different factories and from experience look for particular codes. Typically this is a period when demand exceeds supply or Government central planners decide what degree of choice should be allowed. In this phase, many organizations adopt the attitude that there is little need for selling effort. In Western economies, the industrial revolution changed this because supply began to exceed demand and producers had to learn to sell their goods. In this stage the goal of the manufacturer is simply to sell goods and the consumer to acquire some of the limited goods. The primary goal of consumers is to obtain the necessary goods and the goal of management is to produce and distribute the good.

In this stage, the consumer's memory network consists primarily of a node identifying the product category. Information about the product is generally limted to product uses. For example, all soap may be thought of as used for washing. Most market economies have moved well beyond this stage, but it is included for completeness and to distinguish the first efforts of management at differentiating their brand(s) which occur in Stage 2. In many primitive economies and on occasion when the economic system is disrupted by war or strife, stage 1 exists. In the late 1970s in the U.S. and much of Europe, retailers introduced generic goods which were positioned as a return to this stage through the elimination of frills such as branding, advertising, etc. Within five years, however, consumers had ceased to purchase generics—presumably because they did not provide good value to the consumer. This is evidence that managers should attempt to move their new products and brands from stage 1 to stage 2 as quickly as possible. In stage 1, the manager is building primary demand for the product catgory; whereas in stage 2, he/she is beginning to build selective demand for the brand where returns to the brand are much higher.

Stage 2: Brands as Reference

In this stage, the goals of brand management are to position the brand as having unique functional benefits, i.e. to identify the brand's functional benefits with a distinctive name thereby differentiating it from other brands (Copeland 1923; Jones 1986; Brown 1992). Doing so provides the firm and management several benefits. By taking time to give a brand an appropriate and distinctive brand name, the brand name can be protected through trademark registration, giving it legal protection against imitators and denoting the source of ownership (Fogg 1998). Indeed, the 1960 American Marketing Association definition of a brand is very much akin to the brand as reference, defining it as "a term, symbol or design.... intended to identify the goods or services of one seller...and to differentiate them from those of competitors". Remnants of this perception of the function of brands still dominate marketing textbooks (eg Kotler and Armstrong, 1996).

In the early stages of the product life cycle, competitive pressures lead management to identify and differentiate brands in order to establish a competitive advantage with the hope that superiority of the brand will lead to brand preference. Differentiation is most readily achieved by stressing product attributes (functionality) because consumers may still be learning about the product. This is the beginning of secondary demand stimulation. Consumers can now improve product/brand selection because they are able to identify brands and to distinguish between them (Hoyer and Brown 1990). Identification requires only that the consumer be aware of the brand name; differentiation requires more of the consumer, e.g. that they acquire some knowledge about the brand.

The first type of knowledge that consumers might want is product-related information such as superiority of product attributes or quality. Use of functional characteristics enables consumers to rapidly categorize the brand in their mental sets (Cohen and Basu 1987). In particular, consistent quality is a key to successful branding (Doyle 1989). A variety of authors stress that the brand is a guarantee to the potential customer (de Chernatony 1989; Low and Fullerton, 1994; Irons 1996).

In the late nineteenth and early twentieth centuries, consistent quality was an extremely important attribute to consumers who lived in a world where the quality of goods might be low or fluctuating; where government inspection and control of goods had not begun and where self policing of industries was non-extant. Late-twentieth-century consumers have come to take consistent quality for granted. This does not imply that consumers are not interested in quality; indeed many products and brands from cars to bread come in varying quality ranges. The consumer can choose the quality level that suits their budget and personal wants. But they no longer must worry about fluctuations across products and brands sold at the same price and presumably quality levels. Thus, quality has become a necessary, but not sufficient condition for purchase. The determinant attributes (Myers and Alpert, 1968) of today's consumers are quite different. Determinant attributes are those product and/or brand characteristics that actually determine which brand the consumer buys. These could be style, color or features such pouring spouts which meet the individual's personal and social goals.

One interpretation of brands is that they are values in consumers' minds (Southgate 1994). These are not solely functional values (Sheth, Newman and Gross 1991). One of the challenges a brand faces at this stage is that it might become overly dependent on utilitarian values that solely stem from the product's features. Planning for the future needs to ensure that emotional values are added; otherwise the distinction between the product and brand becomes blurred. In a market with experienced consumers some might question whether the brand adds enough value to be distinguishable from the basic product (Southgate 1994).

In this stage, consumers are linking various brand nodes to the product category in memory and expanding the network associated with each brand (Cohen and Basu 1987; Bousch 1993). These networks are mostly categorical in nature (Mervis and Rosch 1981) in that they differentiate brands primarily on physical attributes. This process is described by Keller (1993) who conceptualizes brand knowledge as having two components: brand awareness and brand image. Awareness consists of brand recall and recognition. The first component of brand knowledge is types of brand associations which consist of attributes, benefits and attitudes. In this stage, the consumer learns about the attributes, some of the benefits and begins to form attitudes (See Appendix B for Keller's Diagram of the Dimensions of Brand Knowledge). The consumer may also form a few favorable and some unique associations with the brand.

These relatively simple networks enable consumers to make product selections quickly and to avoid some elements of perceived risk. Each brand represents a chunk of information and each chunk of information are constructed by consumers to avoid explicitly multiple attributes of each brand on purchase occasions (Peter and Olsen, 1994). Studies by Jacoby et. al. (1971; 1977) indicate that consumers faced with selection decisions find the brand name to be the most useful piece of information in making a selection. When offered a choice of brand name, price, or other product attribute information, respondents chose brand name first and price second. At this point, brands have become shorthand devices created by consumers to enable them to make product selections quickly, efficiently and on the basis of relevant information (de Chernatony and McWilliam 1989). In short, the brand name alone has become a decision-making heuristic.

It should be noted that Jacoby's research was conducted in the U.S. and involved mostly decisions involving convenience goods. A change in either cultural context or type of product could result in the application of different and/or more elaborate decision-making rules. For example, purchase of cars would involve considerations other than just the brand name; price might become particularly important. In other cultures, brands might be less important than dealing with a preferred retailer.

Brand names are also the most prized means of avoiding perceived risk (Roselius 1971). As studies have shown, information seeking by consumers enables them to avoid the negative attributes of a product or negative outcomes associated with its use (Derbaix 1983; Deshpande and Hoyer 1983). Ivory's purity is positive (an approach attribute) because it avoids a negative condition--abrading of skin caused by other harsh soaps. Further, the elements of perceived risk that consumers are most likely to avoid at this stage are related directly to the product--its functionality (does it work), health risk (will it cause me harm) and time (loss of time incurred because product does not work)(Jacoby and Kaplan 1972).

The bottom line in Chart 2B is the brand's meaning or value to the consumer. Rokeach (1973) defines values as follows:

> "A value is an enduring belief that a specific mode of conduct or state of existence is personally or socially preferable to an opposite or converse mode of conduct or end state of existence. (p. 5)"

Rokeach's focus was on values to the individual in general rather than in the consumption context. One writer who has addressed consumption values specifically is Richard Pollay. According to Pollay (1983), values are the properties of objects, individuals, or communities that make them good, worthy, or respectable. Further, according to Rokeach (1973), individuals form value systems which are "enduring organizations of ... end states of existence along a continuum of relative importance" (p. 5). Thus, the bottom row in Chart 2B refers to the meaning that consumers attach to brands as they learn about them.

As learning increases, the consumer draws the brand closer by creating a relationship between the brand and his or herself (Fournier and Yao 1997). After asking what Ivory is, consumers want to know "What can it do for me? Will it make my skin soft?" Meaning explains why consumers would buy a brand and initiates a relationship between the consumer and the brand. A product may be used by everyone; whereas a particular brand may be identified with by the consumer as "mine". Not all consumers will find the identical value and meaning in a brand.

Because the focus of marketers in this stage is predominantly on the functional capabilities of the product or service, the emphasis is on communicating instrumental values to consumers. Instrumental values consist of utilitarian or functional values and enjoyment (Csikszentmihalyi and Rochberg-Halton 1981). Utilitarian value is based on the economic value of products (Richins 1994) and their usefulness, i.e. their ability to enable the consumer to affect and control the environment (Prentice 1987). Enjoyment refers to the brand's ability to provide the consumer with pleasure or enable him or her to engage in an enjoyable activity (Prentice 1987; Richins 1994). Smoking provides a good example of the difference in functional and enjoyment values. The Camel ad mentioned earlier noted that Camels do not bite or parch. For smokers, this means that they will not experience an overly hot, dry taste -- this is functional value. Smoking cigarettes is also a matter of enjoyment as it may enable one to take a moment from work and relax or it could provide a social outlet to smoke with one's friends.

Recently, the importance of enjoyment—usually referred to as experiential—has received more emphasis (Holbrook1995). Authors such as Holbrook and Hirschman (1982) contend that many consumption experiences involve fantasies, feeling and fun and that these three Fs are of vital importance in explaining the purchase decision. At even the most basic level of the value structure, consumers choose brands that satisfy their utilitarian value and which provide enjoyment as well.

To date, much of the research in this area has attempted to classify *products rather than brands* according to their values to the consumer. (Examine the work of Richins, Prentice and Homer and Kahle.) One exception to this is a study by Sheth, Newman and Gross (1991) which examined the impact values have on motivations. They studied which types of values affect decisions made by smokers and nonsmokers. Their results indicate that the instrumental value of goods is most useful in determining whether to use the product and the form of the product to use. Functional value was most effective in determining the form of product to use, i.e. filtered or non-filtered cigarettes. On the other hand, enjoyment (the production of emotional states) was most effective in making the "to smoke or not to smoke" decision. Smoking produced enjoyment by eliminating the anger or anxiety that individuals experienced when they didn't smoke. Non-smokers experienced feelings of confidence and intelligence from not smoking.

In summary, in stage 2, most marketing effort concentrates on developing and enhancing functional characteristics of the brand and communicating these to consumers. This, in turn, enables consumers to identify and distinguish the brand from the competition and also acts as a guarantee of consistent quality. Thus, marketers are engaging in a *brand positioning process* defined by Ries and Trout (1981) which builds perception of the brand vis-a-vis competitive brands.

As managers exhaust the possibilities for differentiation based on product attributes, they frequently turn to the use of emotional values. An example of this strategy is Harley Davidson which was positioned in the first fifty years of its life on engineering developments, the inclusion of new features and racing prowess. In the last twenty-five years of the twentieth century, H-D management built an exceptionally strong consumer franchise on the basis of emotion—freedom and American pride. Eventually, Harley turned this into a lifestyle segmentation which shifted it to Stage 4 of the branding process. Honda, however, still stresses the good functional value of its motorcycles.

Consumer effort concentrates on learning about the functional capabilities of brands by building memory networks (Mervis and Rosch 1981) and constructing simple brand images. These are used to make brand selections quickly and to avoid perceived product risk. The values of the brands at this stage are primarily instrumental and enable consumers to decide whether or not to use the brand.

Stage 3: Brands as Personality

By stage 3, consumers are faced with a variety of brands--all of which make functional promises (Staveley 1987; Biel 1991). But advances in technology make it difficult to sustain a functional advantage (Lambin 1997) with the result that brands competing in the same category have become functionally more similar (de Chernatony 1997). To differentiate their brands, marketers focus on incorporating emotional values into their brands, portraying this through the metaphor of brand personality. They select brand personalities consonant with the emotional values of the brand and the target consumers' lifestyle (Aaker, 1996; Smothers 1993; Shields 1992; Belk, 1988; Plummer, 1985) so that consumer and brand personalities are brought into alignment (Malhotra 1988; Schiffman and Kanuk 1996).

From a social interactionist perspective, individuals form self concepts which are one's perceptions of the responses of others to one's self (Solomon, 1983) and use these self concepts to guide purchase behavior (Dolich, 1969, Grubb and Hupp, 1968). For example, a consumer might buy any product purely for its functional benefits (water to satisfy thirst) or to send social, role and lifestyle signals to others (water with a twist of lemon to display sophistication). Ivory is the pure soap that caring mothers use to protect their babies' precious, soft skin. When the brand is used to communicate identity, it is no longer remote from the individual; instead it comes closer to the consumer and a relationship forms between the two (Belk, 1988).

Because of their ability to bolster, enhance or give definition to self concepts (Solomon, 1983), material objects are also the props one needs to play various roles such as teacher, sports enthusiast or business person (Goffman, 1959). Socialization processes occur within cultures, groups and other social institutions to teach individuals the appropriate values and behavior (Peter and Olsen, 1994). Families, reference groups and peers are filters that can destroy or reinforce marketer-controlled information aimed at linking the individual’s self concept and the brand image. Consistent learning occurs because all of a society’s members share a common set of symbolic meanings and develop highly similar brand images.

Bearden and Etzel (1982) shed light on the ability of reference groups to affect the importance of the brand image among types of goods. In their study, goods were divided into luxuries and necessities and social group influences were hypothesized to affect brand decisions through the locus of where a product was used – in private or public. Private goods are items such as mattresses that are not viewed by others and are, thus, less susceptible to social influences; whereas public goods such as golf clubs and televisions may be very susceptible to social influences. Consequently, brands are more important for public goods than private goods.

An excellent example of a relatively new brand personality that has caused a sensation is Joe Camel. In order to increase market share, brand management at RJ Reynolds Tobacco created a personality for a brand that had languished since its glory days in the 1940s and 1950s. Playing off the name of the cigarette, they created Joe Camel—an ultra-hip and cool persona. Noticeably, this personality change was unaccompanied by changes in the physical product. The result has been a surge in Camel sales and popularity which perfectly illustrates the importance and potential success of brand personalities. Done well, they can not only create a strong bond with the consumers, but also provide the manufacturer with a competitive advantage that others cannot duplicate. There will be *only one* Joe Camel.

There are two issues in building brand personalities. The first is how to create the personality and the second is how to measure it. With regard to the first, brand personalities are heavily built by advertising, using advertising characters, slogans, packaging, user imagery, and other elements of the marketing mix (Aaker 1996; Batra, Lehmann and Singh, 1993; Levy, 1959; Plummer, 1985). To the imagery created by marketers, consumers add new benefits and attitudes as part of their brand knowledge (Keller, 1993). Thus, the brand personality encompasses real product attributes, as well as marketer-created images and benefits that are supplemented by consumer supplied images, attitudes and beliefs.

Until recently, measuring brand personalities was difficult due to the lack of a reliable, valid and generalizable scale. In the past, researchers relied on ad hoc scales and instruments taken from personality psychology that are not validated for specific products or brands.(Aaker, 1997) To correct this situation, Aaker conducted an extensive study in which 631 subjects rated 37 brands on 114 personality traits (Aaker, 1997). The results of her analysis revealed five major dimensions of brand personality, each of which has two or more personality traits associated with it. The five dimensions are: sincerity, excitement, competence, sophistication and ruggedness. Three of these are consistent with the "Big Five" human personality dimensions (Norman, 1963). Sophistication and ruggedness emerge for brands but are not represented in human personality theory. Aaker explains that sophistication and ruggedness may be attributes that are desired, but not necessarily possessed. One might assume that they are associated with ideal selves rather than actual selves.

In the stage of brand as personality, the brand has become more than the product (Southgate 1994). It represents values which go beyond the functional ones of its product form to act as an efficient communicator of the personality of the owner (Lanon 1993). Use of the brand confers desired qualities to the user; mothers who use Ivory care for their babies. They are loving and gentle—just like Ivory.

The values of the brand change from instrumental to symbolic and facilitate expression of self or help people represent their past history (Csikszentmihalyi and Rochberg-Halton, 1981; Belk 1988). The ability of possession to confer symbolic meaning has been borne out by a long stream of research. For example, possessions enable individuals to express themselves and their past (Csikszentmihalyi and Rochberg-Halton, 1981; Belk, 1990; Dittmar, 1992); personal values or religious beliefs (Belk, 1992); ethnic identity (Mehta and Belk, 1991); one's competence (Hirschman and LaBarbera. 1990); social power and status (Furby, 1978) and differentiation of one's self from others (Csikzentmihalyi and Rochberg-Halton, 1981).

A study by Belk and Pollay indicates that meaning of possessions changes over time (Belk and Pollay, 1985). They found that new products are advertised for their instructional/functional properties, and that over time advertising shifts increasing the appeal to luxury (symbolic meaning) and pleasure (experiential value). The increasing use of symbolic and experiential values coincides with Csikszentmihalyi and Rochberg-Halton's notion that using material possessions can facilitate living the good life. (Belk and Pollay, 1985)

The symbolic function of possessions is explained by social constructionism in which possessions are construed to be socially shared symbols of identity (Dittmar, 1992). Because all individuals share in a process of transmitting, reproducing and transforming the social meaning of objects (p. 68), consumer become the transmitters, creators and recipients of the meaning of objects. As such, they function as transformers of social meanings. Consumers use their knowledge to examine the possessions of others for the purpose of attributing various attributes to them. In addition, consumers engage in a reflexive process whereby they analyze others' reactions to them in order to determine what meaning others have ascribed to them as a consequence of examining their possessions (Dittmar, p. 86). Thus, identity is established through the shifting perceptions and reflections of the individual by him or herself and others.

Identity is not inferred from ownership of one or a few possessions, rather:

> "Identity is significantly affected by an evaluation of the total symbolic significance of one's own possessions. Instead of isolated artifacts with sharply delineated meanings, they form a sign-complex -- a symbolic Gestalt -- of identity." (p. 86)

From a marketing perspective, Dittmar's Gestalt describes lifestyle. By our lifestyle we are known to others so that their reactions to us can either reinforce our lifestyle or stimulate use to change if the reflection is not what we desired.
Goods are also cultural co-ordinates. McCracken describes the culturally constituted world as the plane of everyday experience "in which the phenomenal world presents itself to the individual's senses fully shaped and constituted by the beliefs and assumptions of his/her culture" (McCracken, 1986, p. 71). Cultural categories are the "coordinates of meaning" and represent the basic distinctions of the phenomenal world such as race, gender, social class, occupation, etc. Brands become a means of assigning consumers to categories. The affluent drive Rolls Royce and the less affluent drive Fords. In addition, cultural principles are the ideas or values that determine how goods are organized in consumers' minds, evaluated and constructed. Success is associated with owning a Mercedes Benz and failure with an old, dilapidated Ford.

Value as defined by the marketer is communicated through many of the same cues used to communicate the brand. For example, American Express encodes a great deal of difference in meaning between its platinum, gold and green cards. The holder of a platinum card must be very affluent and, hence, very successful, compared to the holder of a green card. This process works successfully *only* if the "viewer" respond to the holder with the appropriate respect. If not, American Express has failed to establish sufficient value and meaning in their cards to attract potential users, and thus, consumers might as well use another, less expensive card. In popular terms, American Express has failed to create sufficient value (real and symbolic) to justify the higher cost of their card. Their ability to do so is constrained by the willingness of consumers to create, re-interpret, modify, alter and respect the meaning of the brand.

Thus, the notion that products and brands have symbolic properties which are used by individuals to convey meaning exists at a broad cultural level, at the group level through shared social meanings and at the individual level in the form of self concepts and roles. Confusion occurs when individuals from one social system encounter others from a different social system or when they are inexperienced with a role. In either case as they become more sophisticated, their ability to choose the brands appropriate for their self concepts and lifestyle improve as does their integration into the appropriate groups. An example of this is the use of briefcases in the business world. Use of a briefcase ordinarily communicates that one is a business person. Within the corporate structure, however, there can be vast differences in the brands of briefcases used. While only the CEO and top executives carry Dunhill briefcases, the level below them uses Hartmann briefcases and at the bottom level, the newly hired managerial trainee may use a canvas sided attaché case from Lands' End. Use of the wrong briefcase can be demeaning (use of the Lands' End attaché instead of the Hartmann) or presumptuous (use of the Hartman instead of the the Lands' End). Either situation will affect the way that the individual is viewed and evaluated.

Stage 3 requires that management pay constant attention to the market to create the right personality for the brand and to update it when needed. An example of a firm with a strong personality for their brand (even iconic properties for the brand) is Levi Strauss. From the 1960s through the 1980s, Levi was *the* brand of jeans in the U.S. market. The company, however, failed to constantly change the perception of Levi jeans with succeeding teen-age markets so that their former 48% share of market has fallen to 29%. Why? Today's youth thinks of Levis as their dad's (and mom's) jeans. The "cool" jeans of the hippies and boomers have become staid, stale and old. Levis is scrambling to update their image for the jean-wearing, youth market. The brand's personality must constantly change to keep up with constantly shifting consumer self images and expression.

In Stage 3, marketers begin giving brands personalities that incorporate human characteristics and values so that the brand becomes a means of expressing one's identity and self. Through a complex process in which consumers use shared social meanings, they constantly transform, alter, receive and reflect brand images and meanings to express self, lifestyle, group membership, status and values such as success. In this process, consumers are making the brand their own through their interpretation of it. As a result, they form relationships with brands. Thus, the marketer initiates the process through advertising and other marketing elements and consumers respond with their own interpretations which the firm may then reinterpret. This process can continue indefinitely in order to keep the brand fresh.

Stage 4: Brand as Icon

In the Brand as icon stage, the meaning of various brands has become so widely accepted that the brand can be used to stand for something beyond itself; in short, it has become a symbol. At this point Goodyear (1996) believes consumers "own the brand", because they understand and use its symbolic properties. In stages one and two, the brand was primarily owned by the manufacturer who understood its functional capabilities and emotional values better than consumers. With greater experience and much more learning about brands, consumers feel so much closer to brands that the brand can be said to reside with them (Gordon 1991). Thus consumers know that Nike is winning; that Marlboro represents independence; Camel is "coolness"; and that Rolls Royce is the epitome of luxury, quality and status. The brand's image is strong enough to stand on its own in signifying values and consumers use it for that purpose (Goffman, 1959; Gardner and Levy, 1955). For example, the term "Rolls Royce" might be used to describe any object as being at the top of its class which means that consumers feel comfortable describing Godiva Chocolates as the "Rolls Royce of chocolates".

The fourth stage usually results from management's extensive and continued use of the same value for long periods of time. The slogan, "Engineered like no other car in the world" has successfully reinforced the perception of Mercedes Benz quality for decades, just as Coca-Cola has been the brand that refreshes. Management has chosen to associate the brand with a particular value and usually extended that perception of the brand around the globe. Thus, the chosen symbol (whether quality, prestige, or "coolness") must be of value to consumers around the world to be successful.

To reinforce the symbolism, brands frequently use some physical symbol to denote the brand. Mercedes has used the same hood ornament (star in a circle) for decades; Marlborough its red and white packaging; Mack trucks its bulldog; Harley Davidson an eagle; and Coca Cola its hourglass bottle. These icons become shorthand means of identifying symbolic brands no matter what the local language.

In this stage, consumer networks of knowledge, as described by Keller (1993), are well developed. The node representing the brand is strongly defined and well entrenched in memory. Connected to it are a number of associations. Krishnan (1996) has explained the importance of primary and secondary associations in building a brand's equity. In his view, some associations are primary such as Michael Jordan and Nike; others are secondary associations such as the Chicago Bulls, basketball and NBA champions being associated with Nike. In this case, the association with Michael Jordan leads to an important set of secondary associations of a highly positive nature in which all become winners.

These secondary associations are important for two reasons. First, they increase the number of associations and the more associations that any brand has, the more likely the consumer is to be able to recall and recognize the brand (Keller, 1993). Second, they may be means of identifying the uniqueness of the brand. Only Nike is associated with champions and Chicago Bulls through its contract with Michael Jordan. All brands must have some common associations so that they can be categorized together. Thus, LA Gear, Adidas, Reebok and Nike are all athletic shoes with certain characteristics in common. But the appeal of any particular brand is its unique associations. L.A. Gear is style; Adidas with soccer; Reebok with aerobics and Nike with winning, aggressiveness and Michael Jordan.

At this point, the symbolic value of a brand expands to include categorical meanings as well as self-expressive ones. Categorical meanings symbolize group membership, social position, status and locate the individual in social-material terms. In the Sheth, Newman and Gross (1991) study, brands were notably associated with social values, where social values are :

> "the perceived utility acquired from an alternative's association with one or more specific social groups. An alternative acquires social value through association with positively or negatively stereotyped demographic, socioeconomic, and cultural-ethnic groups (p. 161)."

They found that the Marlboro brand was strongly associated with "outdoorsmen", "blue collar workers," "cowboys," and "men" and negatively associated with "women", "sophisticated women" and "rich people." The individual's desire for group membership and acceptance leads to the purchase of the products and brands deemed appropriate by the group (Olshavky and Granbois, 1979). Men who like the rugged, independent cowboy image smoke Marlboroughs while younger, hip smokers prefer Camels and drink Pepsi because it's the choice of their generation. Venkatesan (1968) demonstrated this effect when he found that group pressures can affect selection of men's suits. Management ceases to be the main arbiter of brand meaning because the brand has become a shared symbol of society. Around the globe Harley-Davidson symbolizes a lifestyle; Mercedes symbolizes success; and Yahoo!-ing symbolizes membership in the world of netizenry (internet citizens). Management must jealously guard their brand's meaning because it is so prominent. In the 1980s, Harley Davidson spent much time, money and effort stamping out undesirable secondary associations with Harley motorcycles (drugs and nazi images). Failure to closely monitor the brand and its images in the past had led to loss of market share and appeal among the prime Harley market – 35 to 60 year olds. Instead the brand was associated with the wrong groups and social class. Consumers had given Harley an entirely different meaning—one at odds with the goals of management.

So far, it appears that brands might move through a progression from unbranded or brands as reference to become brands as icons. This need not be the case for all brands. As mentioned earlier, a new brand in an old product category may enter at any stage. So, today a new brand of soap/cigarettes might enter in the brands as reference stage, but it could also enter as an icon if management is willing to spend the money and make the effort to establish the meaning of the brand as a symbol. One can easily argue that this was the case with Body Shop endangered animal soaps, Virginia Slims cigarettes and Lexus automobiles.

A paper by Park, Jaworski and MacInnis (1986) discusses the branding strategies of management. Their brand concept management strategy (BCM) begins with the assumption that managers choose a brand concept with value-laden meanings before the brand is introduced and that the same brand concept be reinforced throughout three successive stages: introduction, elaboration and fortification. Brand concepts are either functional, symbolic or experiential as defined previously.

The Introduction stage occurs during market entry. The brand concept is chosen before entry with a long run perspective in mind so that management is committed to using the same brand concept whether functional or symbolic throughout the product life cycle. In this period, the marketing mix is charged with communicating the brand concept to the appropriate market targets and to facilitating transaction activities such as arranging for appropriate distribution outlets.

In the second stage, elaboration, activities focus on enhancing the value of the brand's image so that its perceived superiority to competitors can be established. Plans for re-positioning the brand at this stage should have been formulated before market entry. The final stage of fortification links the elaborated brand image to the image of other products produced by the firm in other product categories or brand extension. The model of Park, Jaworski and MacInnis differs from the classical marketing process outlined earlier primarily in terms of the value of brands. Park, Jaworski and MacInnis (1986) assume that one can introduce a new product as symbolic whereas the classical marketing approach implies that a layer of functional value must be laid before firms can successfully construct symbolic meanings for brands. To illustrate this, Park et al (1986) use Lenox China and Brooks Brothers suits. However, they overlook that these are brands associated with products that have been in existence for centuries. Much of the necessary functional value of these product categories was already developed by the time these brands were introduced. In a sense, other firms had developed the functional values of the product so that Lenox and Brooks Brothers could capitalize on this foundation to create symbolic meanings for their brands. Thus, the Park, Jaworski and MacInnis model fails to account for brand development in the product category prior to the introduction of the symbolic brands.

The Goodyear model illustrates branding in a product category over time which allows for multiple, succeeding brands to enter the market at different stages using different values. Park, Jaworski and MacInnis' functional BCM is similar to Stage 2 of the Goodyear model; their symbolic corresponds to Stage 4 of the Goodyear model and their experiential BCM would be found in stages 2 through 4 of the Goodyear model. With this in mind, it is possible to conclude that new brands can enter the market with a symbolic value only if consumers already have an understanding of the functional value of the product. A new brand of soap such as The Body Shop can enter the market with a highly symbolic image (status and animal rights) because consumers already understand the functional value of soap. Without that, it would be impossible to use a brand to symbolize higher-order values such as status, success, achievement and peace beyond those usually associated with the product category.

Stage 5: Brand as Company

Entry into stage five marks the transition from classical marketing to postmodern marketing as defined by Brown (1995). This necessitates major changes on the part of both consumers and management.

On the demand side, consumers are far more sophisticated, have a greater experience of a broader array of brands and have become computer as well as market literate with the result that communication becomes less structured, more interactive and better suited to answering individual queries (Barwise, 1997). More efficient and flexible electronic data capture enables marketers to gain a deeper appreciation of small groups of consumers" buying behavior, offering the opportunity for a new set of relationships to be forged between consumers and brands. As this occurs, some consumers become less receptive to mass market communication and demand more open and specific communication. Growing penetration of the Internet allows more consumers to find out what they *want* to know about brands, rather than what marketers want to say (Mitchell, 1997). These are the vigilante consumers described by Faith Popcorn (Popcorn, 1992). They are interested in more than the brand. They hold corporations accountable for individual brand actions, boycott any transgressor's brand portfolio and use the new communication channels to broadcast such wrong doings to other consumers. Increasing consumer cynicism demands that senior management formulate clear views about the values their firm adheres to and ensure that everything their firm does ties into these values.

On the supply side, markets are likely to become more splintered, as needs-based segmentation becomes more common (Piercy, 1997). The response is a greater number of brands designed to meet the needs of smaller and smaller segments. Rather than support an array of individual brands, management is shifting toward greater use of corporate branding (de Chernatony, 1996) in order to provide an umbrella of respect for the firm's portfolio of brands. Through better satisfaction of particular need states, brands shift more toward becoming the consumer's friend.

Corporate branding is not the extent of the change; the fundamental nature of the brand is being reconceived. No longer to managers think of only the physical product; rather they think of products plus services (e.g. not just a car brand, but a car brand with regular maintenance servicing occurring because of a series of communications directed from the company to individual consumers). The era of the service industry has arrived (Bateson, 1995) which has a major impact on how firms create value for their customers. It is the service component that enhances the firm's ability to create value. In the past, bank tellers created value by handling transactions and being pleasant and personable to customers. In an era of ATMs, value in the eyes of consumers has changed. Consumers become part of the value creation process by depositing funds, paying their own bills and obtaining cash themselves. Banks make this possible through provision of the ATM, but it is the customer who handles the transactions and decides when the transaction will take place. The growth of telephone banking (e.g. Nationsbank, First Direct) reflects the way consumers are prepared to take more responsibility for the tasks historically undertaken by tellers and to have greater control over their financial affairs. Through ATMs, on-line services and telephone banking, banks have created a more relevant value to consumers.

Other examples abound. Any retailer might sell furniture, but only IKEA has organized its stores to maximize the service component for shoppers. Through modular planning of cabinets, furniture and other architectural features and co-ordination of fabrics, colors and styles across departments, IKEA enables shoppers to co-design and co-construct new concepts in living and to customize their living spaces.

In both the ATM and IKEA examples, the relationship between the consumer and the firm has become much more interactive. Consumers co-produce as well as consume. In doing so, they are *tailoring the brand and its values to their individual needs*. By making their brands more flexible, progressive firms have re-designed their services, products and times of offering to enter into an active partnership with consumers. This may be the true meaning of relationship marketing (Gronroos 1995).

As the company becomes the brand, communication must expand to present the same message at all of the points of contact. Numerous stakeholders interact with different parts of the firm. Any individual could be a consumer of the brand, a media reporter about the company, an owner of the brand through stock purchase or a regulator of the company in an elected, regulatory capacity. With the opening of the firm, consumers are presented with more, and diverse, points of contact with the firm and they can choose which will be the most appropriate contact point for their particular concern (Normann and Ramirez, 1993). As Normann and Ramirez express it, a firm such as "IKEA is not so much a retailer as the central star in a constellation of services, goods, design, management, support, and even entertainment." Consumers have grown familiar with the IKEA concept of value, environmentalism and feel comfortable dealing with this firm. The personality of IKEA is communicated through staff and all communication points with the consumer, whether advertising, internet sites or public relations activities. The company must create a continuing dialogue with customers in all of their potential roles.

Communication shifts from second-hand to first-hand information through the process of interactive value creation. Information no longer flows in one direction--from the firm to the consumer (McWilliam et al 1997). Consumers seek out information in order to determine whether they want to have a relationship with the company and what type of relationship they want (Cartellieri et al 1997). This requires two-way communication in which the consumer may initiate the communication or merely respond to the company. In classic brand building, the company took the initiative in creating the brand's personality and functional characteristics. In the brand as company stage, consumers interpret the brand's meaning, adapt it to their own uses and in so doing create value. Companies can enhance this process through the judicious use of information systems (de Chernatony, 1996; Normann and Ramirez, 1993) that track shifts in consumer values and respond flexibly to changes in the marketplace as well as input from consumers.

E-commerce facilitates this two-way communication and building of information systems. Sites such as Amazon can assess reader interests and send personally tailored messages of new offerings to individuals. By tracking orders, Amazon is able to determine how successful their communications have been. And consumers can respond with book reviews, ratings of books and other comments about books. In a recent study of the internet, Eighmey and McCord (1998) determined which factors consumers use to evaluate web sites. Confirming previous communication research, they found that entertainment value, personal relevance and information involvement were important. Unlike previous research on non-electronic media, they found that *personal involvement and continuing relationship* were important factors in internet communication.

To ensure consistent communication, firms find that staff become critically important as brand builders.(King, 1991) The firm must ensure that all its staff understand the brand's vision, its core values and live the brand's values through their daily actions, thereby being a key source in the brand's personification (de Chernatony and Dall'Olmo Riley 1998). Achieving this requires extensive training and a comprehensive explanation of the brand's meaning and strategy. The emphasis of the brand communication plan shifts to firstly showing staff any new campaigns and only when they understand and are able to deliver the promises, can consumer communication commence. Staff must understand their brand, be motivated to perform in a manner consistent with the brand's identity and be empowered to take actions that enhance it.

Few firms recognize the truth of this more than Ritz Carlton and Disney. Ritz Carlton Hotels has been recognized through numerous awards, including the Malcolm Baldridge Award for Quality, for its meticulous devotion to quality and its goal of near perfect service. What differentiates Ritz Carlton Hotels from other hotels is its emphasis on employee selection, training and empowerment. In an industry characterized by low pay and high turnover, Ritz Carlton carefully selects employees (1 out of every 10 applicants), trains them for days before they begin work (even to what to say to guests) and empowers them to rectify a situation on the spot so long as it does not cost Ritz Carlton over $2,000. Every employee greets customers appropriately, maintains the Ritz Carlton appearance in dress and behavior and communicates a gracious, warm and immediate response to customer needs. Disney is notorious for training all personnel in order to present a flawless performance to delight, entertain and exceed the expectations of the customer. One is a relatively expensive service, but the other is within the means of nearly all consumers.

By increasing the extent and importance of internal communications, staff will better understand their role in reinforcing a consistent brand identity, will feel more committed (Buchanan and Huczynski 1997) and the external communications of the corporation should be more consistent. It is increasingly important that the same message be communicated to all stakeholders. No longer can firms claim to be environmentally concerned while being pursued by Greenpeace. In the brand as company stage, actions and words must be consistent. The same message must go to all publics whether consumers, media, government or activist groups.

Through interactivity, consumer learning becomes more active, effective and longer lasting than passive learning (Krugman, 1965). Active learning requires central rather than peripheral processing of information about the company (Peter and Olsen, 1994). The result is more knowledge about the brand, more extensive network(s) in long term memory, more strongly defined nodes of knowledge, and more accessible information. Because of central processing on a number of occasions, the information has more value for the consumer and is less likely to be forgotten.

In this stage, extending brands becomes more difficult. Thanks to umbrella branding, the extension has an impact on the perception of the firm as well as the individual brand. A number of studies have demonstrated that extensions can have both positive and negative effects on existing brands. (Dacin and Smith, 1994; Aaker and Keller, 1990; Bottomley and Doyle, 1996; Broniarczyk and Alba, 1994; Bousch and Loken, 1991; Park, Milberg and Lawson, 1991; Reddy, Holak and Bhat, 1994; and Keller and Aaker, 1992) The result can be a dilution of brand meaning or even an inconsistency of meanings as values incorporated into the brand can change. Thus, it is critical that all stakeholders receive the same message.

In summary, this stage demands a re-thinking of the brand to include the service element, a re-structuring of communications at all the diverse points of contact that occur between stakeholders and the firm and careful selection and training of staff about the brand. Management must explicitly consider what values they will communicate, how they can include the consumer in the creation of added value and how they can maintain consistency of message. All of this begins with the desire of consumers to become more involved and the desire to form a closer relationship with brands and their firms.

Stage 6: Brand as Policy

In the final stage, brand as policy, the brand and company become closely identified with social, ethical and political issues (Goodyear 1996). Consumers commit to those brands and companies who share their views. Examples of this strategy are the Body Shop, Virgin, Benetton, Heinz and Patagonia. All of these firms have taken a stance on one or more social, ethical or political issues. The Body Shop has spoken out on behalf of the environment, treatment of third world peoples, voting, abortion and other social issues. Benetton seeks to generate racial and ethnic unity through "the united colors of Benetton." Patagonia has taken a strong environmental stance and seeks to reduce excess consumption by consumers through its zero growth policy.

The binding of the corporation to social, ethical and political issues differs from the past good citizen status where corporations satisfied their social obligations by contributing to the girls scouts or other causes. This stage of brand as policy is an active attempt to right wrongs, fight injustice and create a better world. The brand as policy is an active stance that can be highly controversial and irritate as many consumers as it attracts. Benetton's advertising showing photographs of a family looking at their son dying with AIDS brought home this reality to the world, but at the same time attracted a considerable amount of criticism. While some consumers and retailers liked it; others very much disliked it and some retailers refused to display such ads. By taking a firm stance and showing commitment this will, however, give consumers reasons to be an advocate for the firm (Christopher et al 1991), to believe in it and support it in the face of controversy and aggression. These consumers have more reason to be committed to the firm -- not just loyal to its products. Given the downside risk of alienating some consumers and distributors, the success of such a strategy depends on attracting more committed consumers than repelling uncommitted ones.

As consumer needs become more sophisticated, i.e. higher on Maslow's pyramid, brands must be designed to meet higher level need that reflect the motivational need of the consumer (Assael 1995). Market research firms have developed procedures for segmenting consumers according to their needs. One such firm, Synergy Consulting, divides the population into three broad clusters: substance driven (those at the lower end of the hierarchy of needs whose motivation is to survive from day to day and who are looking for security), outer directed (those at a higher level of need who are driven by esteem and status concerns, assessing their success through comparison with others) and inner directed (those driven by the highest level of need, i.e. self-actualization). It found that the inner-directeds are becoming a more important group, mainly at the expense of the sustenance group and are forecast to exceed the importance of the outer directed group (Mitchell 1998).

The Stanford Research Institute also categorizes consumers into three broad groups which are principle-oriented, status oriented and action oriented. Each of these groups can be subdivided into those with fewer or more resources. (Solomon, 1999, page 182-3) Unsurprisingly, marketers tend to be more interested in the groups with greater resources who have the ability (financially and psychologically) to purchase based on symbolic, expressive and socially conscious bases. This is especially true of the self actualizer and fulfilled groups that tend to be more inner directed.

Recognizing that consumers commit to brands that epitomize the values they believe to be important, the growth of designer label brands during the 1980's, i.e. brand as personality in Goodyear's (1996) model, could be partly explained because of the importance of the outer directeds in the past. Today, however, with the growth of inner directeds, these people are seeking brands whose values mesh with their own. They are keen on working with suppliers to re-engineer their activities so that time spent on chores is minimized. This in part explains the advent of brand as company, where consumers re-adjust their activities to jointly create value with suppliers. A good example of this is learning how to shop for groceries on the Internet, to save the chores of traveling, loading, packing and unloading. This leaves more quality time, enabling active search for brands whose values reflect the individual's social, ethical and political views. The stance of the Co-op bank in the U.K. on only investing in ethical companies appeals to the inner directed person.

According to Rokeach (1973), there are two types of values--instrumental and terminal. Instrumental values enable individuals to achieve their goals. Instrumental values of importance are ambitiousness, cheerfulness, helpfulness, honesty, rationality and politeness. If an individual is capable, helpful, hard-working, self-controlled and responsible, this augers well for the likelihood of having a comfortable life. Terminal values are the goals or end states. Terminal values that are of particular interest to the inner directed consumer are equality, freedom, happiness, salvation, wisdom, a world of beauty, self-respect and a sense of accomplishment.

Means-end analysis used by a number of consumer researchers allows us to track consumer purchase motivations from the physical and abstract attributes of a product to its functional and psychosocial consequences which, in turn, are linked to instrumental and terminal values. (Peter and Olsen, 1994) Thus, purchasing Body Shop cosmetics can be an instrumental action that enables the individual to express their desire for a cleaner, safer, greener world and one that respects the rights of developing nations through trade. Using Body Shop cosmetics communicates the terminal values of the user to others--the sort of world that they want and the sort of person they are.

At this point, the consumer's knowledge of the brand is very extensive and the brand is directly associated with strongly held values of the consumer. Because each linkage in long term memory may create a new means of accessing brand information, the close association between a brand, its corporate heritage and its values increases the accessibility and recall of the brand.

Before firms leap into this stage, they must consider whether their heritage will support a brand as company stance. In the U.S. the logging and wood and paper pulp firms would find it difficult to support a strong stance on the environment as would Wall Street houses that have been tried for insider trading or petroleum firms with oil spills on their record.

Consumers would find Anita Roddick’s pro-environmental stance to be much more believable than an equivalent stance by Revlon and Lancome who have consistently been in trouble with the animal rights groups.

The brand image at the end of the evolutionary process is highly similar to what Kapferer (1997) calls brand identity. He envisions the brand identity as having six facets: physique, personality, culture, relationship, reflection and consumer's self-image.

While the facets of Kapferer's brand identity do not coincide perfectly with the stages of the evolutionary process, there is much overlap between the two. Kapferer's physique evokes the connotations of functional value; personality and culture tend to capture the instrumental values and relationship; reflection and consumer's self image tend to align with the terminal value concept. Thus, Kapferer's concept, developed independently of Goodyear's evolutionary process, tends to provide a form of concept validity to the hypothesized evolutionary process.

CONCLUSION

This paper makes several contributions to the literature. First, it shows how a practitioner-developed model such as the one posed by Goodyear has real practical value. This is evidenced by the use of real world examples (Marlboro, Harley Davidson, Camel, Ivory, Ritz Carlton, IKEA, Coop Bank and the Body Shop) scattered throughout the paper. Second, it provides a basis for grounding the practitioner model with strands of different streams of literature that indicate its appropriateness. Throughout the paper there are numerous references to the writings of anthropologists, sociologists and psychologists as well as business and marketing writers dealing with subjects such as the self concept, social constructionism, the study of values and the development of memory networks. Third, the paper adds to knowledge by showing that while the Park et. al. model helps us understand brand development, use of the Goodyear model gives a better understanding of possible brand evolution routes and enables us to take particular courses of actions for different stages. Fourth, the model enables brand marketers to appreciate the dynamics of competition and develop stronger strategies for their brands. Finally, in this last section, the paper suggests avenues for further research to better understand the brand evolution process
.

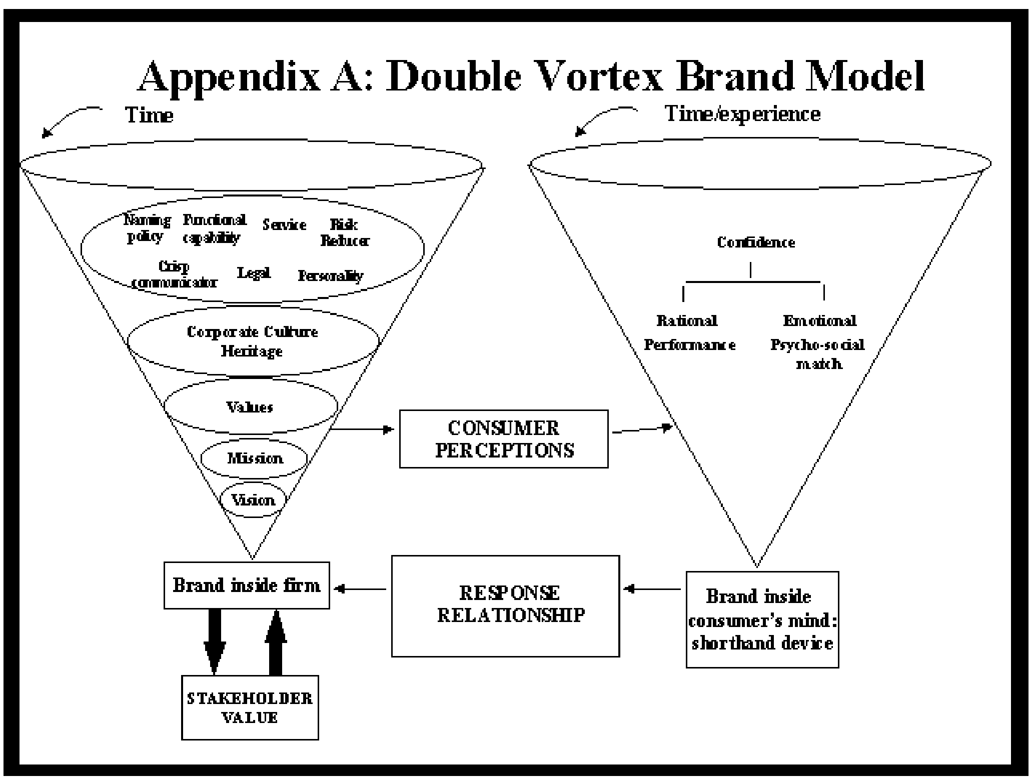
Because this paper primarily seeks to use Goodyear's (1996) model to show how the nature of brands might vary over time, one of our concerns was to clarify how this metamorphosis occurs by continually adopting both a managerial and a consumer perspective at each of the six stages. Our rationale for undertaking this review is that by being aware of the brand evolutionary process, managers should be better able to plan for their brands. When launching their brand, they should be able to assess where competitors' brands are on this spectrum, what level of learning consumers have accumulated and therefore which stage is most appropriate for their brand. In addition managers can plan how they intend to manage their brand over its lifetime and how far on this spectrum they intend it to travel.

Given sufficient investment, a brand could be located at any point in this evolutionary continuum. Where the brand is located depends on the long-term vision of management and the changing needs of consumers. Through the classic branding stages (1-4), much of the effort to create the brand's identity is exerted by the firm. Over time, however, the consumer becomes more involved in this process, and this presents a challenge to firms as they must learn how to work with consumers. Stages 1 and 2 represent relatively low consumer involvement. The consumer knows what the brand is and what it functionally can do. Beyond these stages, the involvement of the consumer grows. As involvement increases, so the relationship between the firm and the consumer changes, ideally resulting in a stronger commitment.

As Goodyear (1996) comments, not all brands will want to or need to extend their brand to the brand as company stage or brand as policy. Only a few firms will be willing and able to overcome the risk of moving to the brand as policy stage. Of the two stages, it is likely that a more firms with opt for the brand as company stage because they are able to capitalize on the service component of their brand. For these firms, it is essential that they study all the points of contacts they have with consumers with a view to redesigning their business to ensure better consistency. They need to consider the advantages of engaging in a new set of alliances that will enable them to create value for the consumer where, and when, and under what conditions, the consumer desires that value.

Which stage the firm chooses to locate itself in on this evolutionary spectrum also depends heavily on the nature and development of the industry. Cosmetics and beauty aids were a mature industry when Anita Roddick anchored the Body Shop to a number of social, ethical and political issues. New brands such as AOL and Yahoo, on the other hand, had to engage in a lot of brand as reference advertising (stressing what they could do for the consumer) before moving to the brand as personality stage and neither has moved to the brand as policy stage yet, although Yahoo would appear to be making efforts in this direction.

The last two stages have been described and alluded to by writers.(Cartiellieri, Parson, Rao and Zeiser, 1997; de Chernatony, 1996; Norman and Ramirez 1993; and King, 1991) To date little work has been done to assess whether firms benefit from developing their brands to the company and finally to policy stage. This important area would benefit from other researchers following through benchmarking research to better understand the managerial challenges and the corporate rewards from branding at the company and policy stage. Benchmarking forces the firm to address what the competition is doing which, leads to a comparison with the benchmarking firm in terms of strategy and success. Questions that have yet to be addressed include: to what extent are consumers prepared to accept new roles in co-designing and co-delivering tailored value with suppliers?, where problems occur during this co-development stage how forgiving will consumers be and how does this tailoring of value affect perceptions of the brand?, do staff see the greater involvement of consumers as a threat?, does greater staff commitment correlate with greater long term rewards and if so, to what extent?, do certain types of views about social, ethical and political issues damage the long term success of brands and are consumers prepared to pay a greater premium for brands that adhere to particular social, ethical and political issues? By addressing some of these research topics, not only should more insight be provided about successful brand management principles, but it may also suggest further stages in the evolutionary process.



Appendix A: Double Vortex Brand Model

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