THEORY/CONCEPTUAL

Reflections on customer-based brand equity: perspectives, progress, and priorities

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Abstract "Conceptualizing, Measuring, and Managing Customer-Based Brand Equity," published in the *Journal of Marketing* in 1993, was one of the early thought pieces and review papers on branding in the field. Written to be a comprehensive bridge between the theory and practice of branding, it has received a large number of citations and several awards through the years. Here, I look back at that article and provide some perspective as to how it was developed, highlighting some of its main contributions. I also outline some of my subsequent related branding research, as well as that of others. Finally, I consider some future research priorities in branding, putting emphasis on the online and digital developments that have occurred since the publication of the article.

The publication of "Conceptualizing, Measuring, and Managing Customer-Based Brand Equity" in the *Journal of Marketing* in 1993 was an important crossroads in my research career (Keller 1993). Writing the CBBE article gave me a chance to both look back, in terms of what I had learned and believed about branding, as well look forward, in terms of what I wanted to focus my research and writing on in the future. The article captured a lot of my thinking at that time on a number of branding topics and provided a blueprint going forward that influenced my research agenda and writing for years to follow.

The paper captured the imagination of many marketing scholars too. The article was well-received and earned several awards. It has become a Ph.D. seminar standard to read and discuss in the years since and is one of the most widely cited articles in the field, with over 10,000 citations (according to Google Scholar). With this paper, almost 25 years later, I would like to again look back and look forward. The branding area continues to be deemed as vitally important by both academics and practitioners and taking stock as to what we have learned—and not learned—can offer valuable insight and inspiration.

Specifically, I want to update the CBBE article by providing some background and context as to how the article came about and was developed, what I feel were its important contributions, and what research progress has been made on some of its key topics since its publication, both in terms of my own research program and those of others. I also want to look to the future and suggest areas where I feel greater understanding and insights are needed with branding. Specifically, I outline two broad sets of topics which I feel have much potential for productive research programs and significant managerial impact going forward, putting special emphasis on digital developments.

How it happened

It is interesting to look back at when, where, how and, most importantly, why the CBBE article was written. The CBBE article was written in the midst of a 3-summer, pre-tenure sabbatical and leave during the 1991–1992 school year at the Australian Graduate School of Management at the University of New South Wales in Sydney, Australia. Prior

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to writing the paper, I had a productive research partnership with Dave Aaker at UC-Berkeley that started when I joined the faculty there in January 1986. At that time, Dave had been concentrating more and more of his research on marketing strategy; my Ph.D. thesis research had focused on the effects of advertising memory retrieval cues on brand evaluations. We both became interested in studying brand extensions, and our first paper in the area (Aaker and Keller 1990), also published in *JM*, became one of the early foundational pieces and led to a number of follow-up studies that we conducted.

Over time, Dave became more interested in writing directly to marketing practitioners and influencing how they thought about their brands, which he has done with great success for decades now. I had different goals at that time: I was interested in getting tenure at the Stanford Business School, where I had moved, and making my own academic mark. Although brand extensions were clearly a central issue to branding, there were many other important branding issues which also deserved greater attention from academic researchers and marketing practitioners, and I had begun to start thinking, writing, and lecturing about them.

The branding area was just emerging as more broadly important, and there was increased interest in the topic by both academics and practitioners. At the same time, because there was also much uncertainty and confusion about many branding concepts and guidelines, I knew there was a tremendous opportunity to contribute by offering some clarity to the area. The time in Australia gave me the chance to pull together and solidify my thoughts on branding, as I had already learned that nothing clarifies thinking like having to write something down and figure out exactly what you mean.

I also knew a good review paper could provide much structure and direction to the field. As a Ph.D. student, I was greatly influenced by Jim Bettman's award-winning *JM* review article on memory (Bettman 1979). In fact, the idea for my thesis research came from an anecdote about the LIFE cereal brand which Jim described and interpreted in his article. LIFE cereal had suffered from poor ad recall until they chose to put a scene from their popular "Mikey" TV commercial on their actual product package. I became fascinated by the notion that brand names and packages are often insufficient cues to advertising at the point-of-purchase and more explicit cues à la Mikey may be necessary. Bettman's *JM* review paper provided some initial theoretical guidance for my research on the topic.

Additionally, I had also become a big proponent of developing detailed conceptual frameworks that could offer insight and guidance to both academic researchers and marketing practitioners. I had the opportunity to supervise four Ph.D. students while I was at Stanford (Jennifer Aaker, Sheri Bridges, Christie Brown, and Meg Campbell). In each case, I encouraged them to include a detailed, macro-level conceptual model to provide broader perspectives to the phemenona

they were studying, before honing in on the more specific research problems they would actually be investigating.

In my own case, for example, although my thesis research dealt with advertising retrieval cues (Keller 1987), the second chapter in my dissertation laid out a broad, comprehensive model of memory effects in advertising that addressed encoding, storage and retrieval factors in some detail. That model provided much inspiration and direction to my subsequent advertising research efforts and led to 2-3 related research streams where I explored additional effects of ad retrieval cues (Keller 1991a; Forehand and Keller 1996; Keller et al. 1998), as well as the effects of coordinated media campaigns (e.g., print reinforcement and radio replay of TV ads) (Edell and Keller 1989, 1999), competitive ad interference (Keller 1991b), and other advertising topics. All of this research benefited from the theorizing that had been developed in my Ph.D. thesis and, in particular, the mediating and moderating factors that I had identified to explain how advertising worked from a memory perspective.

For all of these reasons, I felt it made sense to write a review paper on branding. I was hoping to make several contributions with the paper. One, I wanted to provide some conceptual structure and clarity to branding, but also offer some helpful managerial guidelines. Two, I wanted to organize and interpret the rapidly expanding body of research on the topic, but also highlight areas in the greatest need of future research and provide some guidance as to how that research could be shaped.

Although lengthy, the article itself was written fairly easily. I already had many ideas and much material to work with. I received some helpful suggestions on early drafts from some colleagues and benefited from a constructive review process led by Tom Kinnear from the University of Michigan, the *JM* editor at the time. The paper was published as the lead article in the January 1993 issue of *JM*.

Most important contributions

With the CBBE article, there were several specific goals I was trying to achieve. Most importantly, I wanted to provide a conceptual overview of brand equity which would be helpful in thinking about how to build, measure, and manage brand equity. I also wanted to put forth a specific definition of the brand equity concept. At that time, all kinds of definitions of brand equity were being proposed, especially in the trade press. I wanted to provide a definition of brand equity and a perspective on branding that would be helpful for marketing practitioners, but I wanted to have it strongly rooted in consumer behavior theory.

This focus reflected my basic philosophy about branding. I have always felt that consumers and customers are at the heart of marketing, as reflected by the simple definition of marketing as "satisfying consumer needs and wants better than competitors." I chose to use the term "customer-based brand equity" because I

wanted to distinguish my own more micro, consumer-focused view of brand equity from other more macro, financial-oriented views of brand equity. Brand valuation methods, and Interbrand's method in particular, were becoming more popular, and there was much interest in industry at the time on putting dollar figures on the value of brands. My interest, on the other hand, was in providing strategic insight and guidelines, centered in consumer behavior theory, which would create the value which these financial models would then assess.

As I outlined in the article, the definition of customer-based brand equity that I proposed – "the differential effect that brand knowledge has on customer response to brand marketing activity"—was characterized by three dimensions that I felt were critical to the theoretical development of the concept: 1) differential effects created by a brand; 2) brand knowledge—defined very broadly as any type of mental brand association—as the source of the differential effects and 3) response to a wide variety of different marketing and other variables for the brand as the basis or outcomes of those differential effects. As outlined below, those three key components led to much subsequent research.

With that definition and conceptualization as a foundation, the paper also attempted to provide some useful structure into how to think about building, measuring, and managing customer-based brand equity, including the following highlights.

- *Building customer-based brand equity* was defined in terms of three activities: Choosing brand identities or elements; designing and implementing marketing activities themselves; and leveraging secondary associations by linking the brand to some other entity—a person, place or thing.
- Two approaches to *measuring customer-based brand equity* were suggested: an indirect approach which focused on potential sources of brand equity by measuring brand knowledge, and a direct approach that attempted to actually measure the differential effect created by that brand knowledge on consumer response to different aspects of the brand's marketing program.
- Six guidelines for *managing customer-based brand equity* were identified: emphasizing the importance of taking a broad and long-term view of marketing a brand; specifying the desired consumer knowledge structures and core benefits for a brand; considering a wide range of traditional and nontraditional advertising, promotion, and other marketing options; coordinating the marketing options that were chosen; conducting tracking studies and controlled experiments; and evaluating potential extension candidates.

The final contribution of the paper was to outline a number of branding topics in need of more research. As will be described below, although much progress has been made on those topics and others, much work remains.

My subsequent CBBE-related research

One of the advantages of writing a conceptual paper is the research agenda it naturally spawns. In my case, perhaps the most important follow-up to the CBBE article was my textbook, *Strategic Brand Management* (SBM), which used much of the structure and concepts from the article as a blueprint to develop a comprehensive 600+ page examination of building, measuring and managing brand equity. The SBM text, now in its 4th edition (Keller 2013), has been translated and adapted in many languages and countries and is viewed by many as one of the leading textbooks in the area. Although there were many specific research projects that I was involved with that also followed fairly directly from the thinking expressed in the CBBE article, I will only highlight two of my main research streams here, on brand knowledge and brand extensions.

Brand knowledge

At the very core of customer-based brand equity is the concept of brand knowledge. The original CBBE article viewed brand knowledge from the perspective of an associative network memory model. I had always found that model—and its notion of spreading activation—to be very robust and useful to explain and interpret all kinds of marketing and consumer behavior phenomena. I felt it was particularly applicable to brands and branding (John et al. 2006).

The CBBE article offered a very simple taxonomy of brand knowledge that broke the concept down into two key components: 1) *Brand awareness,* consisting of brand recall and recognition, and 2) *brand image,* characterized by the strength, favorability and uniqueness of different kinds of attribute and benefit associations for the brand. Even though it was fairly basic, the figure from the article displaying the full taxonomy was subsequently reprinted in a number of different publications, reinforcing the value of even simple conceptual frameworks to facilitate understanding. I published several follow-up articles that expanded or built on this depiction of brand knowledge.

Articulating brand knowledge

A *JCR* article (Keller 2003) outlined in more detail the specific dimensions of brand knowledge in terms of: Awareness, attributes, benefits, images, thoughts, feelings, attitudes, and experiences. The central thesis to that paper was that it was critical to develop broader perspectives towards brand knowledge given that: 1) marketing activity creates or affects multiple dimensions of brand knowledge and 2) multiple dimensions of brand knowledge, in turn, influence consumer response to marketing activity.

The *JCR* paper also delved into more detail in the brand leveraging process, making the case that any other entity –

person, place or thing—can be characterized by those same dimensions of brand knowledge. A three-factor model was proposed that maintained that the extent of equity transfer that could potentially occur from linking a brand to another entity depended on: 1) consumer knowledge of the other entity, 2) meaningfulness of the knowledge of the entity to the brand, and 3) transferability of the knowledge of the entity to the brand.

Brand resonance model

Another important follow-up was the development of the brand resonance model which focused on key dimensions of brand knowledge and how they affected resulting consumer-brand relationships. This model was first outlined in Keller (2001) and expanded in greater detail in subsequent SBM text editions. The resonance model outlines a series of branding stages and building blocks to profile how consumers form relationships with brands (see Fig. 1).

The resonance model makes some important additions to the thinking in the original CBBE article. The concept of brand salience, defined in terms of breadth and depth of brand awareness, is introduced as the base level of the model. Brand salience depends on the extent to which the brand is thought of easily and often—at all the right times, in all the right places, and in all the right ways. Even by just acknowledging the importance of brand awareness at both purchase and consumption, this was a much richer view of brand awareness than the straight-forward brand recognition and top-of-mind awareness measures often employed in industry, or even some academic research, such as with the original CBBE article. An important and rich concept, brand salience has now become a much bigger part of the branding lexicon (e.g., as a key component of market research leader Millward Brown's Meaningfully Different Framework).

Building again on the original CBBE theorizing, the resonance model also draws two key distinctions in its next two levels up, in terms of brand image and brand responses. The first important distinction is in the duality of brands, both in terms of tangible and intangible associations, related to performance and imagery respectively at the brand image level, and in terms of the rational and emotional responses that either type of information might evoke as brand responses at the next level up.

With this structure in mind, the model highlights that "going up" the left-hand side of the model of the pyramid can be viewed as a more "rational route" to brand-building and going up the right-hand side can be seen as more of an "emotional route." The model acknowledges that strong brands go up both sides of the pyramid, while also recognizing the importance of "cross-over effects," such that performance associations affect feelings and imagery associations affect judgments.

A second important distinction that is made in the resonance model is in the notion of points-of-difference (PODs) and points-of-parity (POPs) as a basis of positioning. Based on joint research with the originators of the idea, Brian Sternthal and Alice Tybout of Northwestern University, the brand positioning model was explicated in detail in an HBR article (Keller et al. 2002) and in later revisions of the SBM text.

Addressing a fundamentally important component of brand and marketing strategy, the POD and POP model provides a much more competitively-realistic and consumer-grounded approach to positioning vs. the classic approaches to positioning espoused by marketing pundits such as Ries and Trout or found in traditional positioning statement templates. The realization that brands need to both have advantages (PODs) in some areas and break even in other areas (POPs) with respect

Fig. 1 Brand resonance model
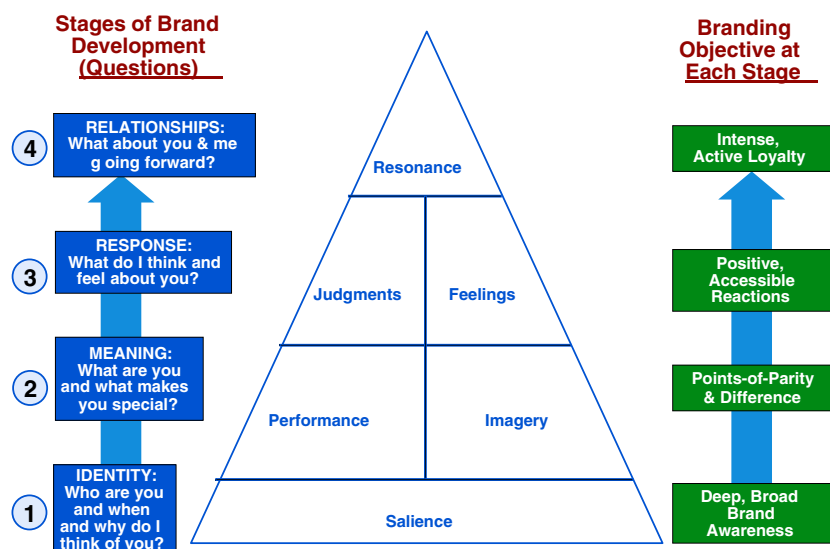
to a well-defined set of competitors has been enlightening to many practitioners in particular.

Judgments and feelings, in turn, are the two key inputs into the fourth and last stage of the model, and another important contribution, the concept of brand resonance. *Brand resonance* is defined in terms of the extent to which a consumer feels he or she is "in synch" with a brand. It is reflected by the level of intensity and activity in the relationship the brand engenders with consumers and is conceptualized in terms of four components: behavioral loyalty, attitudinal attachment, sense of community and active engagement. Although originally devised in the very early days of the Internet, as it turns out, the model was constructed in such a way that it is still highly relevant and applicable even in today's digital marketing environment.

In particular, the dimensions of brand resonance help to capture developments in social media and how consumers have become more involved in potentially new and different ways with brands. The model describes how marketers need to go beyond mere repeat buying (*behavioral loyalty*) so that consumers create strong bonds with the brand (*attitudinal attachment*), as well as to each other and the company as a whole (*sense of community*). An especially useful concept, *active engagement* is defined to be when customers are willing to invest time, energy, money, or any other personal resources in the brand beyond those expended during purchase or consumption of the brand.

Consumer engagement is inherently a broad concept—engagement may be directed towards the brand, company, or other consumers as a result of attitudinal attachment, a sense of community or perhaps some other factor. In practice, however, engagement has often been operationalized as more of a media phenomenon. The concept of active engagement put forth in the brand resonance model is one that would seem to be more faithful to the engagement concept in its broader terms. By using the investment of different types of resources as its foundation, it can potentially align with other resource-based views of consumer behavior. Its broader scope offers much research potential.

The resonance model, with its roots in the CBBE article, has had impact in several different ways. It served as the basis for Procter & Gamble's global brand tracking system, EquityScan, for years and has influenced brand tracking at a number of other firms too. The resonance model has also been used by instructors in more and more MBA classrooms through the years as a means to explain brand building and consumer-brand relationships to students.

Brand value chain model

Finally, working with Don Lehmann from Columbia University, I developed one more model which built on all of this prior research and theorizing. The brand value chain model was designed to help marketers trace the value creation process to better understand the financial impact of marketing expenditures and investments to create loyal customers and strong brands (Keller and Lehmann 2003). The model was built on some fundamental premises originally introduced in the CBBE article as to how the value of a brand ultimately resided with consumers or customers and what they felt and thought and how they acted, along with the importance of measuring both sources and outcomes of brand equity.

Specifically, the details of the model, displayed in Fig. 2, are as follows. First, brand value creation begins when the firm targets actual or potential customers by investing in a marketing program to develop the brand, including product research, development, and design; trade or intermediary support; marketing communications; and so on. This marketing activity changes customers' mindsets—what customers think and feel and everything that becomes linked to the brand, as reflected by the various components of the brand resonance model. Next, these customers' mindsets affect buying behavior and how they respond to all subsequent marketing activity – pricing, channels, communications and the product itself— and the resulting market share and profitability of the brand. Finally, the investment community considers this market performance of the brand to assess shareholder value in general and the value of a brand in particular.

The model also assumes that three multipliers or filters moderate the transfer between these four value stages, increasing or decreasing the value that can transfer from one stage to another: 1) *program multiplier* is a function of the quality of the program investment and determines the marketing program's ability to actually affect the customer mindset; 2) The *customer multiplier* depends on factors such as competitive superiority, channel and other intermediary support, while customer size and profile determine the extent to which value created in the minds and hearts of customers affects market performance; and 3) The *market multiplier* depends, in part, on the actions of financial analysts and investors and determines the extent to which the value shown by the market performance of a brand is manifested in shareholder value.

Summary

Grounded in consumer behavior theory, I view these three models—the brand positioning model, the brand resonance model and the brand value chain model—as offering marketers a comprehensive set of tools to help them devise branding strategies and tactics to maximize profits and long-term brand equity and track their progress along the way. Like the famous Russian nesting "matryoshka" dolls, the three models are inter-connected or linked and become larger and increase in scope (see Fig. 3 for a simplified depiction). The first model is a component into the second model; the second model, in turn, is a component into the third model. Combined, the three models take much of the learning and beliefs from academic

Fig. 2 Brand value chain model
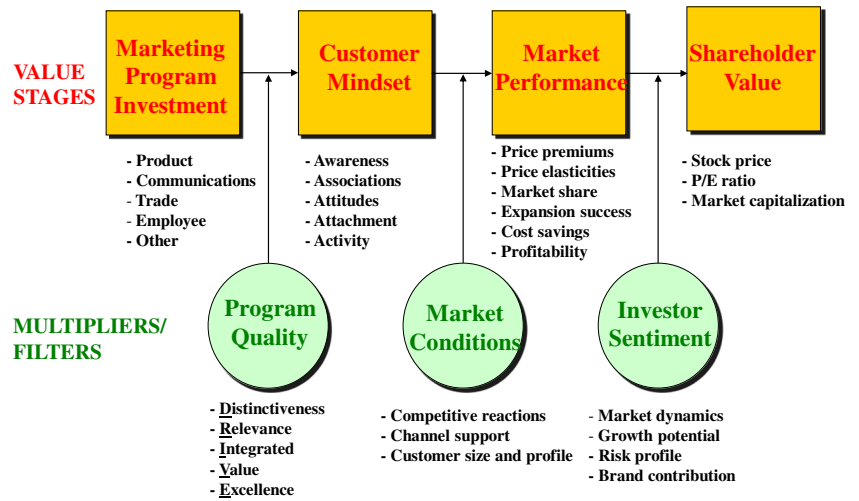
research into branding to provide some micro and macro perspectives to successful brand building.

Brand extensions

My other research stream I want to highlight concerns brand extensions. An active research area to this day, literally hundreds of papers on brand extensions have appeared in the marketing literature over the last 25 years. Given their prevalence as a branding strategy, as well as the challenges which firms face in consistently and successfully launching them, brand extensions are, appropriately enough, one of the most studied areas in marketing.

The CBBE article highlighted a three factor model of extension evaluations originally proposed in Keller and Aaker (1992):

1. How *salient* parent brand associations are in the minds of consumers in the extension context, i.e., what associations come to mind about the parent brand when consumers think of the proposed extension and the strength of those associations.

2. How *favorable* any inferred associations are in the extension context, i.e., whether these associations suggest the type of product or service that the brand extension would be, and whether consumers view these associations as good or bad in the extension context.

Fig. 3 An integrated set of brand planning models
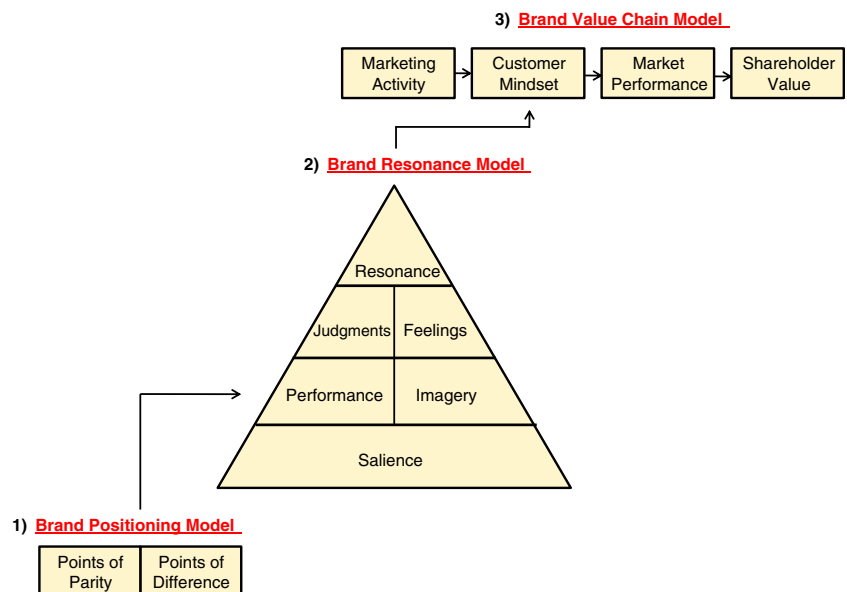
3. How *unique* any inferred associations are in the extension category, i.e., how these associations compare with those about competitors.

Building on these notions, later research described a four factor model of the feedback effects of an extension on parent brand knowledge and evaluations (Keller and Sood 2003; Keller 2013):

1. How *compelling* the evidence is about the corresponding attribute or benefit association in the extension context, e.g., how attention getting and unambiguous or easily interpretable information about product performance or imagery is for that association.

2. How *relevant* or diagnostic the extension evidence is for attribute or benefit associations for the parent brand, e.g., how much consumers see evidence on product performance or imagery in one category as predictive of product performance or imagery for the brand in other categories.

3. How *consistent* the extension evidence is with the corresponding parent brand associations. Inconsistent extension evidence creates the potential for change, with the direction and extent of change depending on the relative strength and favorability of the evidence.

4. How *strongly* existing attribute or benefit associations are held in consumer memory for the parent brand, i.e., how easy an association might be to change.

Much of my subsequent brand extension research looked at different aspects of these models and the extension evaluation and feedback effects process. The findings of several of the published papers included:

- Keller and Aaker (1998) examined different dimensions of corporate credibility and found that a corporate brand association of being innovative was particularly beneficial to improve extension acceptance.
- Bridges et al. (2000) showed how communicating the right kind of information about extensions could provide "explanatory links" and reduce uncertainty to improve extension evaluations.
- Desai and Keller (2002) showed how different ingredient branding strategies affected acceptance of subsequent extensions: Co-branded ingredients were more beneficial than self-branded ingredients for more dissimilar extensions.
- Sood and Keller (2012) found that sub-branding offered two key benefits to marketers by enhancing extension evaluations and protecting the parent brand from any unwanted negative feedback.

Some other subsequent branding research

The CBBE article outlined six main areas of future research, each of which received much research attention since the article was published. Many other productive research streams have emerged in the branding area in the last 25 years, however, that are not necessarily related to the thinking in the CBBE article. Here, I briefly highlight some additional research on the same two topics reviewed above—brand knowledge and brand extensions. I also consider in some depth how various individual differences impact consumer evaluations of brand extensions.

Brand knowledge

Much branding research has highlighted all types of potentially important brand intangibles and how they influence consumer decision-making. Impactful research streams have emerged on such diverse areas as brand personality (Aaker 1997; Mathur et al. 2012), brand anthropomorphism (Aggrawal and McGill 2012), brand emotions (Pham et al. 2013; Verrochi and Williams 2013), sensory marketing (Krishna 2013), and marketing aesthetics (Hoegg et al. 2010), among many other topics.

Flowing from Fournier's seminal research (Fournier 1998), a vast body of research has looked at self-brand relationships in all kinds of interesting and useful ways (Aaker et al. 2004; Batra et al. 2012; Cheng et al. 2012; Dommer et al. 2013; Dunn and Hoegg 2014; Escalas 1996; Fedorikhin et al. 2008; Swaminathan et al. 2007; 2009; Thomson et al. 2005; 2012). Many specific branding considerations such as lifestyle branding (Chernev et al. 2011), conspicuous brand consumption (Ferraro et al. 2013), and brand tourism (Bellezza and Keinan 2014) have also been illuminated from a consumer brand knowledge perspective.

Collectively, this research, and that of many others, has shown how important it is to understand consumer memory and knowledge, and how consumers think and feel about brands.

Brand extensions

A number of interesting and important phenomena have also been identified with brand extensions. For example, by making brand extensions seem more concrete, Meyvis et al. (2012) showed how the presence of visual information and availability of comparison brands could create a more concrete mindset towards a brand extension and shift consumers' preferences from extensions of better-fitting brands to extensions from higher quality brands (see also Milberg et al. 2010).

A number of studies have introduced useful constructs and metrics to better understand brand extension dynamics. For example, Spiggle et al. (2012) developed a brand extension

authenticity (BEA) scale that focuses on consumer perceptions of the "legitimacy and cultural contiguity" of brand extensions. Specifically, they propose four dimensions of brand extension authenticity: 1) maintaining brand standards and style, 2) honoring brand heritage, 3) preserving brand essence, and 4) avoiding brand exploitation. In their particular experimental setting, BEA provided additional explanatory value to evaluations of brand extensions beyond consumer perceptions of fit on the basis of perceived extension similarity or relevance, particularly among consumers with strong self–brand connections.

Much research has explored the relationships among and between brands (e.g., Heath et al. 2011; Mao and Krishnan 2006; Oakley et al. 2008), i.e., how various characteristics of one brand or brands affects consumer perceptions and evaluations of another brand. Brand dilution research, in particular, considers how the introduction of a new product in some form by a company can adversely affect the fortunes of existing brands for the company, especially if the new product is branded as an extension.

Because of its fundamental importance to brand management, brand dilution has been a topic of enduring interest and has received close research scrutiny from a variety of useful angles (Ahluwalia and Gurhan-Canli 2000; Caldieraro et al. 2015; Ferraro et al. 2013; Gurhan-Canli and Maheswaran 1998; Keller and Sood 2003; Kirmani et al. 1999; Loken and John 1993; Milberg et al. 1997; Pullig et al. 2006; John et al. 1998).

Some of this dilution research uses an associative network memory model (Morrin 1999). For example, Lei et al. (2008) showed that the magnitude of spillover between brands in a portfolio is a function of both the strength and directionality of brand associations, as determined by the number and salience of associations linked to each brand. They underscore the possibility of association asymmetry between brands such that a crisis with sub-brand A may not negatively influence evaluations of sub-brand B in the portfolio to the same extent as the same crisis with sub-brand B would influence evaluations of sub-brand A.

Research has also shown positive effects between brands. Shine et al. (2007) showed that the simultaneous introduction of two brand extensions (e.g., two digital cameras) had a "synergistic" effect on consumer evaluations of the extensions independent of their similarity or fit to the parent brand (e.g., Xerox). Consumers appear to view a related set of products from a single manufacturer as inherently appealing.

Similarly, people enjoy complimentary products consumed at the same time more when the products are merely labeled as coming from the same brand vs. different brands (Rahinel and Redden 2013). Complementarity has also been shown to be beneficial with co-brand partners, although it depends in part on consumer processing style or strategy (property mapping vs. relational linking) (Swaminathan et al. 2015).

Summary Reviewing all of even just the more recent research in the branding area on brand extensions in any depth is beyond the scope of this paper. A large part of Chapter 12 in my *Strategic Brand Management* text, however, does catalog some of the important research findings on brand extensions that have emerged in the literature through the years. Table 1 summarizes that research into a set of proposed managerial guidelines.

As is clear from those guidelines, many factors affect how consumers evaluate brand extensions and whether or not extensions are successful. Figure 4 offers a high-level schematic overview of some of these different factors (see also Czellar 2003). In the next section, I will focus on research in that part of the figure that is relevant to

Table 1 Brand extension guidelines based on academic research

1. Successful brand extensions occur when the parent brand is seen as having favorable associations and there is a perception of fit between the parent brand and the extension product.

2. There are many bases of fit: product-related attributes and benefits, as well as non-product-related attributes such as common usage situations or user types.

3. Fit may also be based on technical or manufacturing commonalties or more surface considerations such as necessary or situational complementarity.

4. Knowledgeable "experts" are more likely to use technical or manufacturing commonalities to judge fit; less knowledgeable "novice" consumers are more likely to use superficial considerations.

5. Consumers may transfer associations that are positive in the original product class but become negative in the extension context.

6. Consumers may infer negative associations about an extension, perhaps even based on other inferred positive associations.

7. Concrete attribute associations tend to be more diffcult to extend than abstract benefitt associations.

8. High quality brands stretch farther than average quality brands, although both types of brands have boundaries.

9. A brand that is a product category prototype or exemplar can be difficult to extend.

10. It can be difficult to extend into a product class that is seen as easy-to-make.

11. A successful extension can contribute to the parent brand image and enable a brand to be extended even farther.

12. An unsuccessful extension does not prevent a firm from "backtracking" and introducing a more similar extension.

13. An unsuccessful extension hurts the parent brand only when there is a strong basis of fit between the two and it is a "product failure."

14. The most effective advertising strategy for an extension is one which emphasizes information about the extension (rather than reminders about the parent brand).

15. Sub-branding can enhance distant extension evaluations and protect the parent brand from negative feedback from close extensions.

16. Vertical extensions can be difficult and often require sub-branding strategies.

17. Individual differences across consumers can affect how they make an extension decision and moderate extension effects.

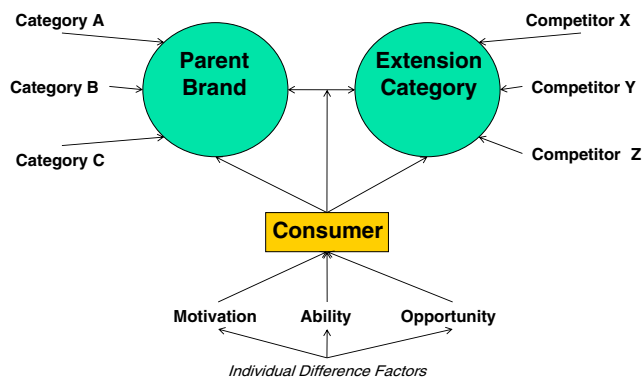18. Cultural differences across markets can influence extension success.

Fig. 4 Conceptualizing brand extension evaluations

consumers and what they know, how they think and feel, and how that affects, in turn, how they evaluate an extension and its resulting success.

Research on individual differences and extension evaluations

Consumers vary in their chronic or situational motivation, ability and opportunity to evaluate an extension in a number of important ways. Research has shown how extension fit and evaluations can be influenced by several consumer characteristics, as follows.

Expertise

Early research by Muthukrishnan and Weitz (1990) demonstrated that knowledgeable "expert" consumers were more likely to use technical or manufacturing commonalities to judge fit, considering similarity in terms of technology, design and fabrication, as well as the materials and components used in the manufacturing process. Less knowledgeable "novice" consumers, on the other hand, were more likely to use superficial, perceptual considerations such as common package, shape, color, size, and usage.

Zhang and Sood (2002) showed a similar pattern of knowledge effects based on age. Children – who have less brand knowledge than adults—were more likely to evaluate extensions on the basis of surface cues (e.g., brand name linguistic characteristics of an extension) as compared to adults who were more likely to use deep cues (e.g., category similarity between the parent brand and extension category).

Decision style

Research has considered how the manner by which consumers tend to make decisions in general affects how they make extension decisions in particular. Monga and John (2010) have shown that one important individual difference in extension evaluations is whether consumers are *analytical thinkers*,

focusing more on comparing specific attributes or benefits of the parent brand and extension, or *holistic thinkers*, focusing more on comparing overall attitudes and judgments of the parent brand and extension. Analytical and holistic thinkers both gave prestige brands permission to extend widely, but holistic thinkers gave functional brands much greater permission to extend than analytical thinkers.

Similarly, Yorkston et al. (2010) have shown that consumers known as *incremental theorists,* who believe that the personality traits of a brand are malleable, are more accepting of brand extensions than consumers known as *entity theorists*, who believe that a brand's traits are fixed. Cutright et al. (2013) showed that when feelings of *personal control* are low for consumers, they may seek greater structure in brands and thus may be more likely to reject brand extensions that do not seem to fit well with a parent brand.

Self-construal and schemas

Another important individual difference variable relates to *self-construal* or how people view and make sense of life and their lives (Lee et al. 2000; 2010). A person with an *independent self-construal* is more concerned with the uniqueness of individuals; a person with an *interdependent self-construal* is more concerned with relationships between and among individuals.

In a branding context, Ahluwalia (2008) posited that a consumer with an interdependent self-construal should be better able to uncover the possible relationships among a brand extension and its parent brand and thus have higher perceptions of extension fit and favorability. In her study, these effects were observed as long as consumers with interdependent self-construal were sufficiently motivated.

Similarly, Kim and John (2008) show that consumers with a low-level construal (i.e., view stimuli in their environments in terms of concrete and contextualized features) are not as sensitive to differences in perceived fit in evaluating brand extensions as compared to those consumers with a high-level construal (i.e., view stimuli in their environment in terms of abstract and generalized features).

Relatedly, Puligadda et al. (2012) argue that *brand-schematic* consumers are more likely than others to process or organize information according to their brand knowledge. *Brand-aschematic* consumers, on the other hand, use other information such as product characteristics or attributes as a frame of reference. Brand schematic consumers were shown to be more likely to see the similarity in a brand extension concept.

Regulatory focus

Another important individual difference between consumers is *regulatory focus* (Higgins 1997, 2002) and the motivation

of people and how they go about pursuing their goals. Individuals with a *prevention focus* are concerned with negative outcomes and avoiding losses via safety, security, responsibility, and so on. Individuals with a *promotion focus* are concerned with positive outcomes and seeking gains and pleasure and avoiding missed opportunities.

Yeo and Park (2006) showed that consumers who are either chronically or temporally prevention focused tend to judge dissimilar extensions less favorably than consumers with a chronic or temporary promotion focus due to their different interpretations of risk. Relatedly, Chang et al. (2011) showed that promotion focused consumers are more likely to focus more abstractly on the overlap in benefits in judging an extension, whereas prevention focused consumers are more likely to focus more concretely on sheer category similarity.

Mindset and goals

Temporal and contextual factors can affect extension evaluations in a variety of different ways. Barone et al. (2000) experimentally demonstrated that positive mood primarily enhanced evaluations of extensions that consumers viewed as moderately similar (as opposed to very similar or dissimilar) to a favorably evaluated parent brand (see also Yeung and Wyer 2005). Monga and Guhan-Canli (2012) found that getting men to think about their spouses or mates put them into a more relational processing mode such that they increased their fit perceptions of moderately dissimilar extensions.

Consumer goals can also play a role. Hamilton and Chernev (2010) showed that upscale extensions could increase the price image of a brand and downscale extensions decrease its price image when consumers were browsing or just looking around, but did not necessarily apply when consumers were actively looking to make a purchase, in which case the effects could even be reversed.

Culture

Recent research has also explored how different cultures respond differently to brand extensions. Monga and John (2007), as well as Ng and Houston (2006), have shown that consumers from Eastern cultures (e.g., China) have a more holistic style of thinking and perceive higher levels of extension fit than do consumers from Western cultures (e.g., U.S.) who have a more analytical style of thinking.

Dilution effects for a typical or similar extension that fails also can vary by culture and consumer motivation (Ng 2010): Easterners exhibited significantly greater dilution when their motivation is high; Westerners exhibited significantly greater dilution when their motivation is low.

Additionally, Torelli and Ahluwalia (2012) have shown that cultural congruency can aid culturally consistent brand extensions over and beyond the effects of perceived fit (see

also Torelli et al. 2012). They note that a cultural congruent brand extension might be something like Sony electric car; a culturally incongruent car might be something like Sony cappuccino-macchiato maker. According to the research, beyond the inherent levels of fit that any electronic manufacturer might enjoy with an electric car, Sony would be expected to get an extra boost in fit and evaluations because of its Japanese country of origin and Japan's strong association with electronics.

Summary

As this body of research has clearly shown, individual differences between consumers matter a great deal and can play a significant role as to how consumers interpret and judge brand extensions. Although there are many different mediating factors that can help to explain these results, many of these individual difference factors can potentially be linked to fundamental considerations of a consumer's chronic or situational motivation, ability and opportunity to process extension information and make extension evaluations and choices.

Areas in need of additional research

With an area as broad and as important as branding, there is naturally a wide variety of research opportunities. Accordingly, the last 25 years have seen concerted research efforts in branding from academics from many different disciplines and in all kinds of different domains. It is rare that an issue of a top marketing journal appears without at least one article that includes the word "brand" in its title.

Along the way, there have been several reviews of research on brands and branding to offer some helpful perspectives and insights. For example, Keller and Lehmann (2006) provide a detailed summary of noteworthy research findings on a host of different branding topics, as well as a comprehensive inventory of unanswered research questions. Schmitt (2012) offers a thorough, incisive view of some consumer psychology perspectives on branding. Völckner and Sattler (2006) provide a more focused review on brand extensions.

Despite all the progress documented by those reviews and others, however, there is much we still need to learn about brands, branding, and building, measuring, and managing brand equity. In this concluding section, I focus on two broad sets of topics that I feel have the greatest opportunity to generate productive research agendas and make significant managerial impact going forward. The first set of topics concerns various digital issues, an area obviously not explored in the original CBBE article given the timing of its publication. The second set of topics concerns updates to some of the future research directions identified in that article.

Understanding digital effects in branding

A hugely important area not addressed in the original CBBE article is digital effects in branding. After the Internet boom of the late 1990s, more marketers became interested in how to build brands online, as well as how to build online brands. Although this development spawned much academic research, a great deal of activity was also found in industry and trade publications. With the deep penetration and extensive daily usage of smart phones and with the Internet of things looming, understanding how to factor all things digital into marketing and branding is unquestionably a top research priority (Yadav and Pavlou 2014).

Although many important and interesting branding issues can be identified in a digital marketing environment, five broad topics are addressed here. Although all forms of research—empirical, behavioral, analytical, managerial or other—may be helpful in the study of digital effects in branding, note that many of these issues especially lend themselves to empirical analyses capitalizing on the vast, abundant data sources now available online on consumer's attitudes and behaviors with respect to brands.

Understanding the value of brands and branding in a digital world

Perhaps the most fundamental issue to consider is how the role of brands and branding has changed in today's dynamic and fast-moving digital world. With so many new and different consumer and firm capabilities, marketers need to rethink virtually all of their beliefs and practices to make sure they are still valid today and, if not for any reason, what they should be doing differently.

Rigorous and relevant academic research can be extremely helpful in that regard. Perhaps the best place to start is with the basic functions of brands and what they do to reduce risk, set expectations, and create tangible and intangible value for consumers. Do consumers view risk and trust differently for brands in a digital setting? Do consumers assess value differently in a digital setting? What role does digital play in communicating and delivering that value?

One well-documented change in a digital environment is the "path to purchase" or the "consumer decision journey." No longer as deliberately linear as suggested by classic "hierarchy of effects" or "decision funnel models," much iteration can occur or steps skipped or compressed as consumers move from awareness to purchase and beyond. An important area of understanding is how the role of brands may differ as a result of different types of consumer deliberations. With consumers potentially influenced by other consumers and others outside the firm virtually every step of the way, how can brand marketing be equally timely and credible?

A number of communications issue come into play here. What forms of online marketing communications are most effective with such decision-making? What is the role of social media; search, display, and other forms of advertising; web sites and so on in affecting consumer progress in the decision journey? How do consumers blend all these forms of communication with sources of influence from others?

Understanding how to manage customer relationships

Digital branding guidelines and principles are often stated in terms of "the consumer" as if so much homogeneity existed that consumers could be treated as one group. A clearly more nuanced view of consumers is necessary beyond the well-worn marketing mantra often seen or heard these days that, "the consumer (or customer) is now in charge of the marketing."

With digital communications, marketers can leverage what consumers are willing to share as to their personal likes and dislikes and their unmet needs and wants to develop a dialogue and forge stronger brand ties. This opportunity for a firm, however, should not be overstated: The reality is, only *some of the consumers* want to get involved with only *some of their brands* and, even then, only *some of the time*. Although some people may want to become highly engaged with the brand; others may have little to no interest in having any kind of relationship beyond purchase and consumption of the brand and no more.

As much research in marketing has shown in general, and with respect to branding in particular, consumers are heterogeneous in many different ways that affect how they think, feel and act towards brands. As was outlined above, many individual difference factors have been shown to affect how consumers respond to brands or brand marketing. A much more robust and flexible view of consumers must be developed in understanding branding in a digital world which reflects these differences.

Sharp conceptual thinking and frameworks are necessary to provide perspective and insight. One tool which may be helpful in that regard—at least in terms of recognizing how different customers may want different relationships with a brand—is the brand engagement pyramid (see Fig. 5). The brand engagement pyramid distinguishes the smaller group of customers at the top of the pyramid, who would like to be highly engaged with the brand, from the broad base of customers at the base, who would choose to not be very engaged, or maybe even not at all engaged, with the brand.

The structure and dynamics of the brand engagement pyramid helps to raise a number of different questions. What is the shape of the pyramid and the distribution of engagement with customers for a brand? How large is the group of customers at the top of the pyramid who seeks engagement? For

Consumers

Fig. 5 Brand engagement pyramid
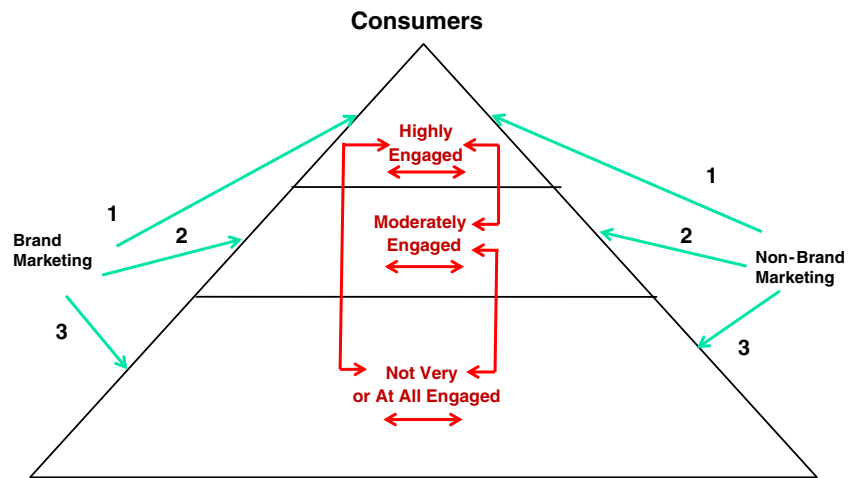
those customers who want to be highly engaged, what are the most effective and efficient marketing activities for the brand?

On the other hand, what are the most effective and efficient marketing activities for those customers at the base of the pyramid who have little or no interest in being engaged with the brand? What are the main non-marketing influences on those different consumers? What are the influences among consumers at the same level or across levels of the pyramid? Is there any "trickle down" effect from highly engaged consumers at the top of the pyramid to those less engaged down below?

These questions have obvious managerial significance and are in need of research attention. Marketers need tools to help measure and assess what kinds of brand engagement pyramids characterizes their brands, as well as how they should best optimize their pyramids as a result. As part of the analysis of the latter consideration, marketers must fully understand all the potential costs and benefits of relationship-building in a digital world from both the firm and consumer perspective.

For example, although digital technology makes it easy for brand marketers to reach consumers in many different ways, that is also true for the marketers of competitive brands too. A deal or offer for a competitor is almost always just a click away, potentially repeatedly testing a consumer's bonds of loyalty. Understanding the roots of true brand loyalty in a competitive digital world is crucial.

Understanding targeting and segmenting

In a related sense, more precise targeting in a digital world means that brand marketers have the ability to tailor virtually all aspects of their marketing—and thus their positioning—down to the individual level. Digital capabilities allow marketers to target consumers uniquely and potentially provide them with a highly customized and tailored brand experience which, as noted above, reflects consumers' specific goals and desires.

At the same time, such efforts in personalization may make it harder to create an active brand community with shared brand values and experiences. It can also potentially dilute the meaning of the brand and create confusion in the marketplace. With a less cohesive image, brand marketing at a more macro or aggregate level, e.g., brand extensions, brand sponsorships and so on, may become less effective and efficient.

What should be the appropriate balance of personalization vs. uniformity across a group of customers for a brand? How does digital help or hurt those efforts? In what ways can digital programs and activities maximize individualization and community for consumers? Are some consumers more digitally sensitive or susceptible such that non-digital means of communication and marketing are just fundamentally treated differently?

Understanding pricing power and switching behavior

An often overlooked part of the branding equation is pricing power and the means by which firms can reap the financial benefits of the value they create for consumers. With the rise of easily accessible discount brands, private labels, and generics in so many categories, online and elsewhere, a fundamentally important question is, what kind of price premiums can national or global brands command in today's transparent and inter-connected marketing world?

A number of specific questions follow. How does the existence of so many product ratings, reviews and comparisons change the ability of brands to command premiums? How do readily available discount brands affect brand loyalty and change consumers' willingness to switch? How much price transparency should brands willingly offer?

Understanding pure digital brands

Finally, an important area largely untouched with deep academic research is how to build purely digital brands without the physical presence of any products or off-line services. Some of the fastest-growing and most successful brands in recent years—notably Google and Facebook—have been born and expanded strictly online, and markets around the developments of apps has exploded.

How should purely digital brands be built? What are the different recommendations and guidelines that emerge? How important is the brand itself and its trademarks for purely digital brands where little other tangible manifestations of the brand exist? Similarly, how do purely digital brands establish credentials and build credibility and trust?

Other important branding topics

The CBBE article identified a number of important topics for future research, which, as noted above, have received much research attention. Nevertheless, there are still important unanswered questions, some of which I highlight below. The main theme in much of this discussion is the need for a broader, more dynamic view of branding effects. Isolating certain individual effects is helpful and can provide value, but may fail to reflect the richness of branding effects that actually operate in the marketplace.

Understanding brand purpose, narratives, and story-telling

Recognizing the increasing importance of social responsibility and brand intangibles to consumers – especially millennials—many marketers have begun to incorporate more abstract notions such as brand purpose, brand narratives, brand stories and many other similar constructs as crucial ingredients to their brand strategies. Such efforts are laudable and potentially very useful, but ensuring that these constructs provide enough financial and branding benefits will undoubtedly be crucial to their long-term success and wide-spread adoption.

Several questions are relevant here. What are the pluses and minuses of higher-level brand constructs? What types of brand purposes are generally more beneficial? How should they be crafted internally and expressed externally? How should they relate to other aspects of the brand positioning and strategy? For example, how explicitly or implicitly should brand purposes be connected to the product or service itself? What makes brand stories or narratives compelling? Are there any downsides to their use? For example, can brand stories or narratives distract marketers or consumers away from more fundamental positioning considerations?

Finally, many of these higher-level brand constructs are designed to tap into brand emotions. The brand resonance model includes a simple taxonomy of brand feelings both more experiential in nature (warm, fun and exciting) and more enduring in nature (sense of security, social approval and self-respect). What are other important types of brand feelings and emotions? More generally, how do brand feelings and emotions work? How easily can they be linked to a brand and in what ways do they affect consumer decision-making?

Understanding brand architecture and brands more holistically

Good brand portfolio management has always emphasized the importance of maximizing coverage and minimizing overlap in the marketplace. That belief continues to drive much brand thinking and strategies today. One of the major branding trends in the marketplace in recent years is the consolidation of brands into fewer, stronger brands. Even leading CPG firms such as Proctor & Gamble, Unilever, and Nestle, with their classic "house of brands" architectures, have begun to put more emphasis on their corporate brands as endorsers to their already well-known and liked family brands.

Firms are thus increasingly seeking to establish mega brands. As corporate brands, in particular, expand their market "footprints" to encompass a wider range of products and more varied marketing activities, an important question is how consumers develop their more holistic impressions of a brand. Although brands may not be as complex as Virgin with its dizzying array of diverse products and services, it is becoming more and more unusual to find any brand that specializes in just one product or service, even if defined broadly.

With the realization that any one brand – especially a corporate brand—may be associated with multiple products or product lines, the challenge is how to optimally blend all the different types of associations that might exist for any particular product or product line for a brand. How do marketers ensure that consumers understand and appreciate brands in their totality? Or are there times that marketers would prefer that consumers view brands in more limited or focused ways? Does the notion of "flagship brands" even make sense in that regard?

Understanding how to develop timeless, inclusive brands

Marketers, no matter how successful, are always confronted with the question of how to ensure that their brands continue to grow and prosper over time despite whatever changes may be occurring with customers, competitors, the company itself, or anything else in the marketing environment. To be successful, brands must be able to stay relevant over time as well as across different types of consumers. The latter is especially challenging when considering all the potentially meaningful ways consumers may differ—demographically, geographically, psychologically, behaviorally and so on.

A number of important research questions follow from this realization. Fundamentally, the issue is how robust or flexible a brand can be. In other words, in what ways can a brand image be crafted so that it is as relevant as possible to as many of the members of the target market as possible for as long as possible? Two particular noteworthy research questions here are: 1) what are the most effective ways to enlist new customers while not antagonizing existing customers if the two groups differ for any reason and 2) what is the proper balance of continuity and change in the brand image over time?

A number of other specific questions follow. How do marketers understand what components of their brand and its image need to be fixed and which ones can or need to be changed over time? Can brand architecture or other brand strategies help to partition the brand in the marketplace to accommodate more customers? How can acquisition and retention efforts be understood and optimized in the broadest possible ways to both build healthy brands and grow a loyal customer franchise over time?

Understanding how brand elements can work together

A central aspect of branding is naturally the brand itself and all the various elements that make it up—names, logos, symbols, slogans, packaging, signage, characters, and so on. Much academic research has examined individual brand elements to provide insight and guidance. Consumers encounter—and marketers design—brand elements collectively and more holistically. More attention needs to be placed on how combinations of different types of brand elements work together—or not—to help to drive sales and improve brand equity. Also, what insights and guidelines can help marketers with newer forms of potentially trademarkable brand identities—sounds, physical environments and so on?

Understanding how to effectively and efficiently track brands

To manage their brands successfully, marketers need to have a deep, rich understanding of how consumers and all relevant parties think, feel and act towards their brands. Brand tracking, broadly defined, is the set of research methods and approaches that firms use to provide as complete and up-to-date understanding of their brands as possible. Traditionally, the centerpiece of brand tracking has been consumer surveys. In recent years, however, it has become increasingly difficult to actually administer those surveys as consumers have become more difficult to contact and less willing to participate in surveys. Yet, at the same time, the need to stay close to consumers and their brands has not abated, suggesting that new means to gain insight into consumers and brands are badly needed.

A whole host of different kinds of measures have been proposed that go beyond surveys or other traditional data collection methods (e.g., focus groups). Marketers are exploring new neural methods, ethnographic methods, and so on. Of particular importance are the digital methods and measures which can be used at the individual or aggregate level to track online behavior. These measure need to be validated and carefully vetted in terms of what they can and cannot do. For new and old data collection methods, strengths and weaknesses must be identified in terms of the effectiveness and efficiency by which they can be employed to gain consumer and brand understanding.

In many ways, brand-building can be thought of in terms of "painting a picture" of the brand in the minds and hearts of consumers. Extending that metaphor, it is important that marketers understand the colors, vividness, and texture of those mental images that they are creating. A carefully constructed set of measures, summarized in dashboards or other accessible means (Pauwels 2014), can be an important step in that pursuit. Academics need to provide the insight and inspiration through proven methods to make that happen.

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