



InSites Consulting



# BRAND RELIGIONS

AN ILLUSTRATIVE OVERVIEW OF THE MOST  
POPULAR MARKETING BELIEFS

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It is the mission, the goal and perhaps even the raison d'être of marketers and brand managers to build, craft and grow strong brands. Yet brands are under pressure more than ever. They are being copied faster, with these replicas sometimes even outperforming the originals.

*“The problem is the fake products today are of better quality and better price than the real names.”*

**Jack Ma**, founder and chairman Alibaba

As illustrated in our ‘Innovation Envy’ bookzine, in this fast-paced environment established brands are being pushed off the throne by new market entrants (InSites Consulting, 2018). Consider Dollar Shave Club; what started as a small start-up is now leading the pack and disrupting the shaving industry. In July 2016, Unilever announced that it was entering the razor business by acquiring Dollar Shave Club for \$1 billion. This to the destruction of P&G’s Gillette, whose market share plummeted from 71% to 58.5% over the last five years (De Tijd, 2019). According to the Innosight Corporate Longevity Forecast, the average lifespan of a company will drop from 61 years in 1958 to a mere 12 by 2027 (Innosight, 2018). Research by scientists at the Santa Fe Institute even brings this down to 10 years, stating that the typical company lasts about that long before merging, being bought out or getting liquidated (Daepf, Hamilton, West & Bettencourt, 2015).

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But the downfall of brands is also visible at the consumer side; the Havas Meaningful Brand 2019 study reported that consumers would not care if 77% of the world's brands were to disappear (Havas Group, 2019).

# RELIGION /ri'lidʒən/

*A pursuit or interest followed with great devotion*

So how can a brand avoid its own zombification, where one might think it is alive but in fact it's been long dead (in the consumer mind)? What makes brands stand out? How can brands keep the spark alive and stay relevant to their consumers? And not unimportantly, what are the success factors to build and grow a sustainable brand?

Many books have been written, presenting marketing theories, frameworks and models on how to build future-proof brands. This abundance of visions and beliefs causes a lot of confusion amongst brand owners and marketers as to which strategy to pursue. Yet not choosing a strategy, constantly switching strategies or trying to combine them all at once is calamitous. In this paradox of choice, focus is necessary. Brands may need to choose and follow what we like to call a 'brand religion'. A religion is defined as 'a pursuit followed with great devotion'. Just as the definition stipulates, brands can benefit from using these frameworks to guide them in everything they do and follow this with great devotion.

Anyone that ever took a course of marketing was probably introduced to Philip Kotler's principles of marketing and branding. Think STP (Segmentation, Targeting, Positioning), the importance of differentiation, and the creation of a USP (Unique Selling Proposition). Kotler is the father of modern marketing and, together with thought leaders like Kevin Lane Keller, David Aaker... he laid the foundation of what we label the 'Classic Religion'. This thinking is still of great value today, with many brands using it as a successful framework to set their marketing plans or brand strategies. Yet in this postmodern world, this Kotlerian thinking has been challenged by new beliefs and visions on how to grow brands in this new brand reality. We see many brands and companies shift away from the 'Classic Religion', pursuing new beliefs and as such experiencing the need for new metrics and performance measurement frameworks.

This is what sparked the research behind this bookzine, where we made an effort to group the most popular books, frameworks and beliefs in different schools of thought.

We found that we can bundle these various streams of thought in five brand religions.





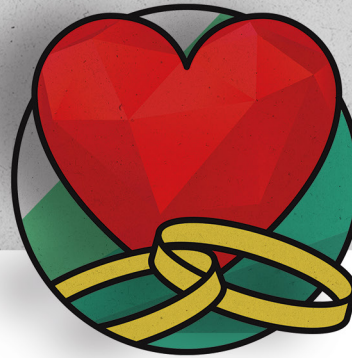
### The Classic Religion

The foundation of modern marketing, emphasizing the importance of segmenting the market and differentiating a brand in the consumers' minds. Famous contributors to this school of thought are Philip Kotler, David Aaker, Jean-Noël Kapferer and Kevin Lane Keller.



### The Influencer Religion

This brand religion emphasizes the role and importance of word of mouth and its ripple effect on growing brands.



### The Relationship Religion

A brand philosophy highlighting the importance of building a long-lasting emotional connection with consumers, where these relationships mirror interhuman relationships.



### The Experience Religion

Building memorable experiences forms the foundation of this brand religion, where these experiences even surpass the actual products.



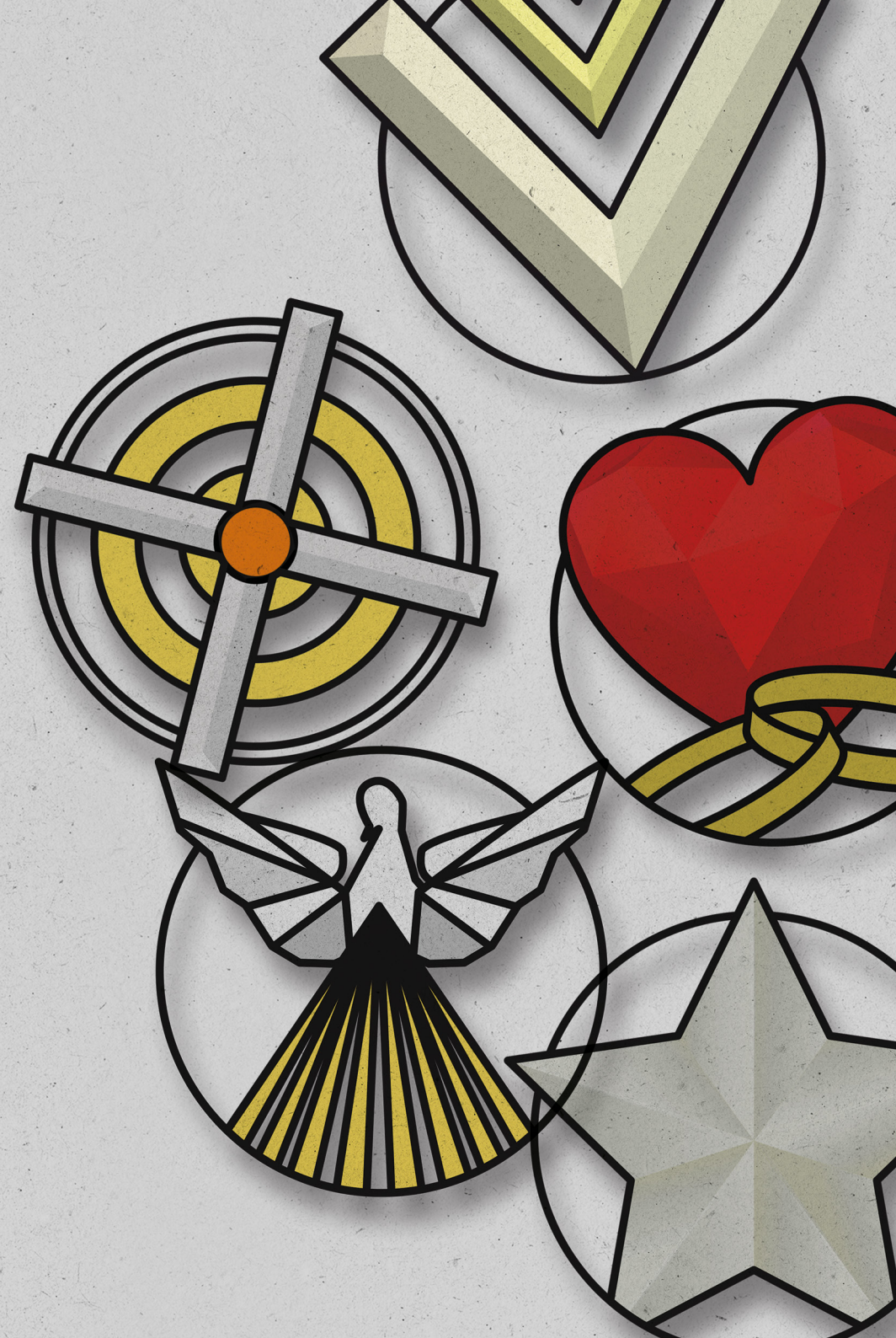
### The Penetration Religion

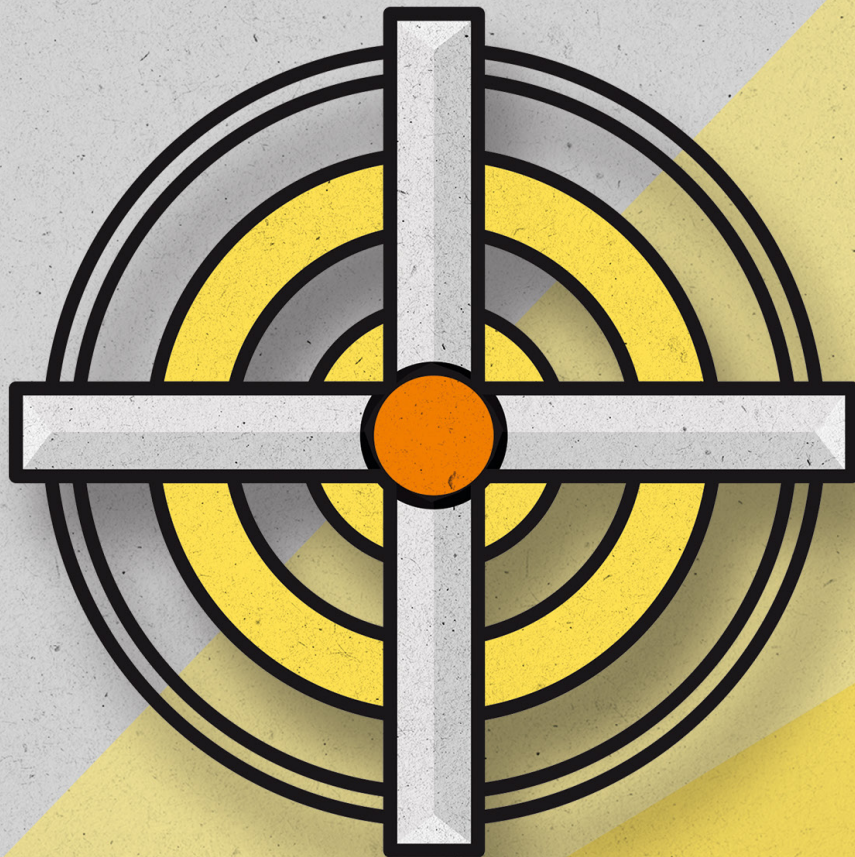
This school of thought challenges the classic thinking by introducing new marketing laws which focus on market penetration through mental and physical availability.

# ABOUT THIS BOOKZINE

This bookzine brings an overview of the principles behind each of these brand religions, where - as a matter of simplification - we introduce three 'beliefs' per religion. These beliefs summarize the core thinking and beliefs behind the religions or frameworks. Relevant case examples have been added as illustrations, as well as guidelines on how to measure brand success within each framework. Unquestionably, there is plenty more to write and say about each brand religion, so for more in-depth understanding, we refer to the reference list which accompanies these brand religions.

Marketing and branding are no exact science, and this bookzine will prove this once again. Many of these religions contradict one another (making this in our view even more interesting and fascinating, since they all come with their proof points and examples). Please note that there is no right or wrong, and that the choice of a religion depends on a brand's industry, market, life stage and strategic focus point. Yet despite conflicting thoughts and beliefs, there are some parallels, and sometimes they are even complementing each other. The last chapter of this bookzine offers a macroperspective on this.





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# THE CLASSIC RELIGION

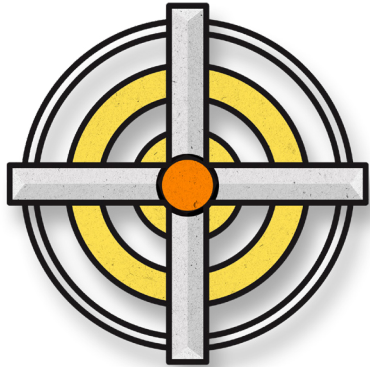
The 'Classic Religion' captures the (initial) thoughts of the founding fathers of the modern brand-management age. Famous contributors to this religion include Philip Kotler, David Aaker and Kevin Lane Keller.

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*"The art of marketing is the art of brand building. If you are not a brand, you are a commodity. Then price is everything and the low-cost producer is the only winner."*

**Philip Kotler**

In contrast to more recent thought streams (cf. infra), the 'Classic Religion' dictates that one must first carefully measure, analyze, plan, strategize before operationalizing in a controlled way.



The 'Classic Religion' can be summarized in the following three beliefs

**#1**  
DIFFERENTIATION IS KEY THROUGH STP

**#2**  
ONE-WAY IS THE ONLY WAY

**#3**  
ALL EFFORTS LEAD TO BRAND EQUITY

# **#1** DIFFERENTIATION IS KEY THROUGH STP

The 'Classic Religion' commands that all brand campaigns should be preceded by a strategic focus exercise. One of the most widely used frameworks to guide this initial process is the three-step STP framework, of segmentation, targeting and positioning.

*"There is only one winning strategy. It is to carefully define the target market and direct a superior offering to that target market."*

**Philip Kotler**

## **S: Segmentation**

Philip Kotler defines market segmentation as "...the sub-dividing of a market into homogeneous sub-sections of customers, where any sub-section may conceivably be selected as a market target to be reached with a distinct marketing mix" (Kotler & Armstrong, 2005). The reason to engage in segmentation is that customer needs may differ in a market. By dividing large, heterogeneous markets into smaller segments that are homogeneous in terms of customer needs, these segments can be reached more efficiently and effectively with products, services, brands and communications that match their unique needs. If the whole potential market represents a pie, segmentation can be conceptualized as cutting this pie into wedges using specific segmentation criteria.

Segmentation can be done by classifying individuals based on descriptive (e.g. demographics, geography, firmographics...), behavioral (e.g. buying frequency, usage rates, social class...), attitudinal (e.g. benefits, attitudes, beliefs...) or psychographic criteria (e.g. lifestyle, personality...). Alternatively, one can also segment 'moments' or instances of consumption, which is often referred to as occasion-based segmentation, classifying and grouping not individuals, but contexts.

## T: Targeting

After segmenting the market, the 'Classic Religion' emphasizes the importance of selecting one or several target segments. This means deciding how many and which segments will be targeted (with one or more specific brands). A range (from broad to narrow) of four targeting approaches exist (Kotler & Armstrong, 2005):

- *Undifferentiated (mass) marketing*: no segmentation; one brings one proposition to the entire market.
- *Differentiated (segmented) marketing*: a company targets multiple segments. This may require the use of different brands or sub-brands, and different ways of brand communication, as the needs of these segments are different.
- *Concentrated (niche) marketing*: a company decides to focus on one specific segment only in a given market.
- *Micromarketing (local or individual) marketing*: very narrow targeting. In an extreme situation this refers to adopting a segments-of-one approach, where products and communication are theoretically aiming at an individual level. The big-data context of today increasingly facilitates such an approach; digital native companies in particular can implement such strategies.

There are several criteria one can consider when selecting the targeting approach. The overriding consideration is profitability, but there also is identifiability (i.e. how easy is it to identify the segment?), size (i.e. is the segment big enough in terms of sales potential?), accessibility (i.e. availability of specialized communication media and distribution outlets to reach the segment) and responsiveness (i.e. the extent to which the segment responds to tailored (brand) marketing efforts) (Keller, 2013). The choice in targeting approach has direct implications in terms of brand management. For example, a company that decides to target 'broad' must also consider the extent to which this can be done with one brand. Evidently, catering to multiple segments with one brand is cost-efficient, as it can create positive spill-over effects; yet a brand that wants to be relevant for multiple segments must be defined in a more abstract way. This could potentially make it be perceived as less tailored and therefore less relevant by prospects compared to brands which focus only on a particular market segment. A company can also decide to target in a 'broad' way and use multiple brands. This aspect of brand management is known as 'brand architecture' (sometimes also called 'brand portfolio management' or 'brand organization strategy').

## Research Implications and Applications

A range of qualitative and quantitative approaches can be used to identify a brand's core audiences, their defining characteristics and needs, how they can be targeted, and what makes a brand most attractive and/or sufficiently differentiated for that target audience.



Segmentation approaches typically combine a mix of existing data with qualitative and quantitative consumer research. The starting point is often a 'connect-the-dots' workshop to harvest current knowledge, bust myths, collect hypotheses and assumptions. This can be followed by qualitative research, where the objective is to test the workshop's hypotheses, and ultimately uncover the attitudinal and behavioral characteristics which will form the basis of the segmentation for subsequent quantitative validation. A less heavyweight approach is to conduct a traditional Usage and Awareness (U&A) study, which uses metrics from the traditional AIDA (Awareness, Interest, Desire, Action) funnel.

The final stage of a segmentation is all about activation. It may involve profiling the client's entire database, using a significantly shortened version of the questionnaire (often called 'the golden questions', 'algorithm' or 'typing tool'). We also get involved in producing creative materials to diffuse knowledge throughout the organization, utilizing storytelling, personas, debriefs and mass communication to embed the segmentation in the hearts and minds of employees.

## **P: Positioning**

A last step, following segmentation and targeting, is positioning. Which boils down to deciding which claims and perceptions to 'load' into people's minds. The result is a brand positioning or brand image: the mental position a brand has in the customers' mind relative to competing brands. According to Kotler, positioning is "the act of designing the company's offering and image to occupy a distinctive place in the mind of the target market". The goal is to create a unique position which should create an advantage for brands and serve as a reference for people to buy your brand.

*"Positioning is not what you do to a product. Positioning is what you do to the mind of the prospect."*

**Al Ries**, marketing professor and author

According to Keller, effectively and uniquely positioning a brand requires (1) determining a competitive frame of reference and (2) formulating not only 'points of parity' but also and especially 'points of difference'.

### **Frame of reference**

When exposed to new brands, people first try to file them in their mental library by using reference points (understanding the category they fit into, competitive brands and how they are different). The competitive frame of reference refers to the category or type of products with which the brand (wants to) compete(s). To help the positioning, it can be helpful to add the frame of reference to the brand name, since a brand name is one of the most direct signals of the context in which a brand operates. Yet, when defining a brand's frame of reference, it is advisable to not choose technology as this can become obsolete at any moment in time.

Apple, for example, named its watch the 'Apple Watch', to frame the category for consumers. Based on the naming, people can decide whether it is something for them or not. If Apple wanted to position it as a fitness coach, a different name might have been a better choice. But for Apple fans and people that like to be 'connected with design', it paints the picture.

The frame of reference also sets the scene. It sets the bar in terms of the criteria a brand must meet to compete effectively as a legitimate or credible player in a category. As a consequence, it highlights opportunities to differentiate as well as to 'stretch' a brand. A branding campaign of McDonald's offers a good illustration of smartly using the competitive frame of reference for positioning and (brand) stretching. A number of years back, McDonald's launched a campaign with the tagline: "four bucks is dumb. now serving espresso". The ad's tagline and brown color might suggest that McDonald's is competing with Starbucks Coffee.

But it is unlikely that McDonald's considers Starbucks as a core competitor and vice versa. So why did they launch this campaign? To claim a frame of reference that provides it with a competitive advantage versus the coffee offerings of its direct quick-service restaurant competitors, including Wendy's, Burger King, Subway, or Tim Hortons. McDonald's uses Starbucks to create a frame of reference in the consumer's mind that positions them in the field of the coffee specialist. Yet they are stretching the brand too, differentiating themselves from Burger King that did not serve espresso at the time, but only plain coffee. Of course, if there is any gain from Starbucks, that is a nice additional win.



## Point of Parity and Point of Difference

Once a competitive frame of reference has been determined, Keller suggests identifying 'points of parity' (POPs) and/or 'points of difference' (PODs) with the brands in the frame of reference. PODs are those associations that the consumer uniquely attributes to a brand. Functional, performance-related, imagery-related considerations can be used as a basis for establishing PODs. They are what differentiates a brand (core in the 'Classic Religion') and makes the consumer choose a brand over others. Audi, for example, focuses a lot on innovation and technology, whereas Mercedes is more well-known for its precision and elegance, and BMW highlights a sports-like driving performance.

The notion of PODs builds on the concept of a USP (Unique Selling Point). The USP is a product's key feature stressed in communication, which makes it different from and better than competing products. A USP is often present in brand slogans (e.g. FedEx - 'When it absolutely, positively has to be there overnight', which later on evolved into 'The World On Time'; or Walmart - 'Always Low Prices', which later on evolved into 'Save money. Live better'). However, in mature markets with a multitude of competitors, it is often difficult to differentiate a brand with one single USP. Accordingly, brands use a combination of elements (multiple PODs), stressing some elements more than others in specific sales and marketing contexts.

Next to focusing on PODs, one can also consider POPs with the competing brands in the frame of reference. POPs are those associations a brand might (wish to) share with other brands in the consumer's mind. For example, an Audi might share the 'luxury' association with a Mercedes. Keller proposes to divide POPs into category POPs

and competitive POPs. Category POPs are those associations that are necessary to be considered as part of a category (e.g. luxury and quality associations keep Audi in the same car segment/ competitive set as Mercedes or BMW). Category POPs change over time because of technological or legal developments, or trends. So, brands need to be vigilant and perceive them as the 'Olympic minimum' associations a brand needs to perform well on.

### Research Implications and Applications

A significant amount of market research is also used to support brand positioning. This typically starts with a qualitative layer, followed by quant, underpinned by a multivariate analysis (e.g. correlation, regression, PLS, PCA, MDS, Discriminant, SEM), to identify brand attributes which drive the brand's desired outcome.

We capture consumer perceptions on a series of brand attributes for the category (stated performance). We also calculate the derived importance of each attribute in terms of how strongly it drives or associates with the desired outcome. By plotting stated and derived importance, we can then classify which attributes are unimportant, top of mind, conscious drivers and latent motivators of the category, resulting in a Brand Positioning Map. The latter highlights all the POPs and PODs between the brand and its key competitors (including attributes where the brand excels and where it is at a disadvantage).

### CASE

#### How Panos redefined their product classification

*Panos wanted to stand out and rethink its in-store communication and product categorization by tapping into their consumers' needs. By better understanding the consumers' decision tree with regards to prepared sandwiches, they wanted to become more relevant for the visitors at the point of sale, and as such stand out from their competitors.*

*In a quantitative study, buyers of prepared sandwiches were invited to group pictures of sandwiches in categories of their choice, not influenced by any predefined classification. The customers were to start by creating two sets of products and label these according to their own first classification rule (e.g. savory bakery products vs sweet bakery products). This exercise continued, with them having to further split the groups they created, until no further POD could be defined. This exercise allowed to identify how consumers categorize products. In this case we found that a sandwich buyer's main choice driver for the type of sandwich is based on three categories: fish, meat or cheese/veggie. This allowed Panos to adapt their in-store communication, now using the recognizable fish, meat and cheese sandwich groups as product category identifiers.*

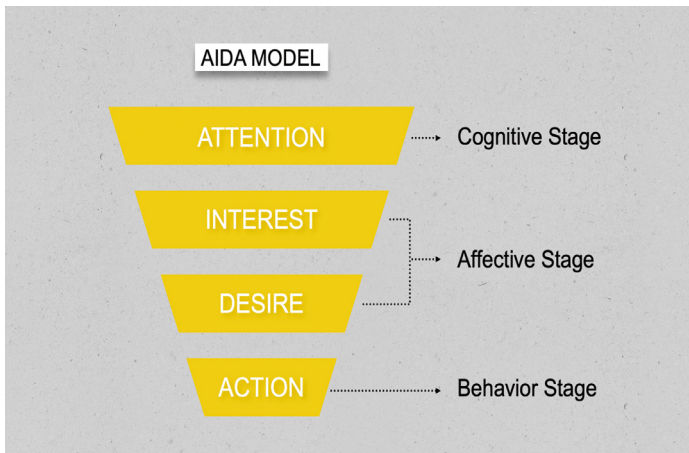


# #2

## ONE-WAY IS THE ONLY WAY

The 'Classic Religion' emphasizes the role of mass one-way push communication to convey information about a brand, and reach specific brand communication objectives. These can range from gaining brand awareness to converting people to buy, and are considered a sequential process (one can only consider or buy a brand if there is brand awareness).

Sequential purchase 'funnel' models are at the basis of this perspective. An example is the AIDA(S) model (adapted from Lewis, 1910): 'Attention or Awareness, Interest, Desire, Action (and Satisfaction)'. The model highlights different purchase stages: from creating awareness, knowledge and preference for a brand to making sure people buy. This model implies advertising content needs to fulfil a number of tasks to ensure consumers move through the sequential steps from brand awareness through to buying and consumption.



The 'Classic Religion' stresses the importance of consistency in execution by advocating an aligned (and again fully controlled) brand communication approach. This imperative builds on the concept of 'Integrated Marketing Communications (IMC)', which Philip Kotler describes as "the concept under which a company carefully integrates and coordinates its communications channels, to deliver a clear, consistent and compelling message about the organization and its products" (Kotler, Armstrong, Saunders & Wong, 1999). Essential is that all brand communication (stressing the USP) should be consistent across touchpoints and advertising formats. The GoPro 'Be a Hero' campaign, featured in-store, online, on buildings... is a modern application of the IMC concept. Today's customers no longer make a distinction between on- and offline. Everything needs to be seamlessly integrated real-time, which increases the importance of an IMC approach in today's context.



# #3

## ALL EFFORTS LEAD TO BRAND EQUITY

The ultimate goal within the 'Classic Religion' is to build brand equity. It is the result of all branding efforts. Aaker and Joachimsthaler define brand equity as "a set of brand assets and liabilities linked to a brand, its name and symbol, which adds to or subtracts from the value provided by a product or service to a firm" (Aaker & Joachimsthaler, 2000). Simply put, brand equity is a brand's value or capital.

*"I argue that the future of advertising, whatever the technology, will be to associate each brand with one word. This one word is equity. It's the modern equivalent of having the best site on the high street, except the location is in the mind"*

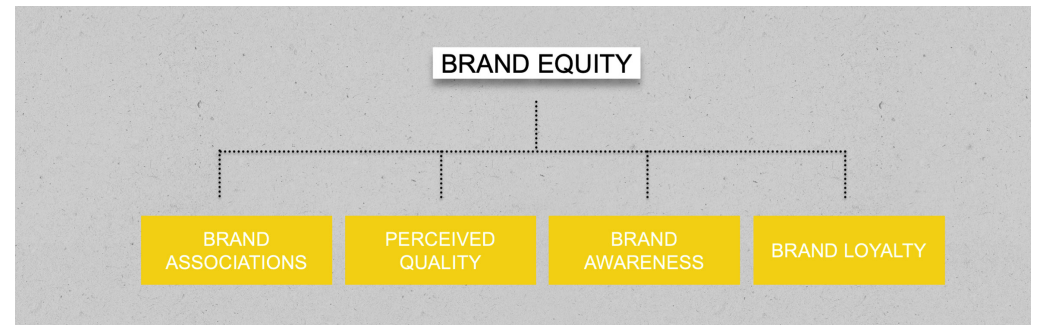
**Maurice Saatchi**, co-founder of Saatchi and Saatchi

A brand has positive brand equity when consumers react more favorably to a branded version of the product than to a generic or unbranded version of the same product (Kotler & Armstrong, 2013). There are largely three important customer-related benefits to having a positive brand equity:

1. Premium: customer are willing to pay more (premium price = higher margins), feel a greater willingness to recommend, a greater loyalty and there is increased marketing communication effectiveness

2. Permission: greater trade cooperation and support, yield licensing opportunities, consumer permission and support for brand extensions
3. Protection: better perceptions of product performance, less vulnerable to competitive marketing actions, higher price inelasticity

Brand equity has four dimensions: brand awareness, perceived quality, brand associations and brand loyalty (Aaker & Joachimsthaler, 2000). Following the principles of the 'Classic Religion', brand awareness, quality and associations come from positioning the brand through integrated marketing communications. These should not only lead to consumers considering or purchasing your brand, the ultimate goal is brand loyalty.



Brand loyalty can be defined as consumer faithfulness towards a specific brand. Typically, two types of loyalty are distinguished: *behavioral (or habitual)* loyalty (i.e. only based on shopping habits, which is often convenience-driven) and *attitudinal* loyalty (i.e. 'conscious', which is feeling- or judgement-based, and triggered by imagery or performance brand associations). The 'Classic Religion's' objective is to go for the latter, since behavioral loyalty has the risk of being based on routine and remaining transactional.

*“Satisfaction is a rating. Loyalty is a brand.”*

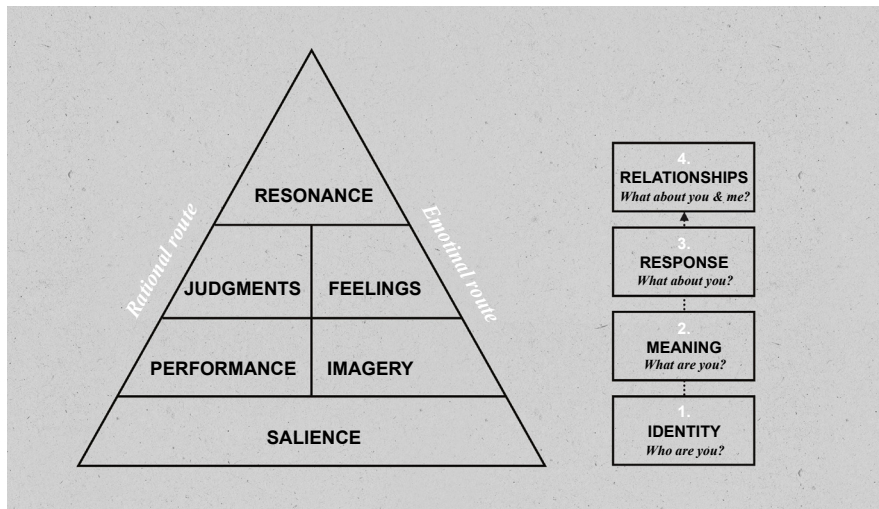
**Shep Hyken**, Customer Service Speaker & Expert

This focus on attitudinal brand loyalty comes with a focus on customer retention efforts. To grow a brand, one can spend marketing budget on customer acquisition or customer retention efforts. The ‘Classic Religion’ values both customer growth strategies, but when having to prioritize, the it advocates to focus on retention first, for at least two reasons. Firstly, customer retention actions are typically described to be cheaper than customer acquisition actions. More specifically, acquiring a new customer is supposed to be anywhere from 5 to 7 times more expensive than retaining an existing one, since you do not have to any spend time and resources going out there and finding a new client. According to an article by Reichheld and Sasser, when customer retention rates grow by 5%, profits increase by 25% to 95% (Reichheld & Sasser, 1990). Secondly, making existing customers care for the brand will also bring in new customers (as the former may convince others).

Multiple brand (equity) management models have been proposed, but Keller’s CBBE model (Customer-Based Brand Equity) is an actionable add-on to the previous one. This model suggests that customers will ask themselves four fundamental questions - often subconsciously - when confronted with a brand. These questions are depicted in the figure above.

The CBBE model is usually depicted as a pyramid, which suggests it is hard for a brand to reach the top level. Many companies only succeed in achieving the lower levels with their brands. Also, the pyramid form highlights the model’s ‘building block’ nature. The traditional view behind this model stipulates that a company must start by focusing on the lower levels. Finally, the pyramid-shaped model highlights different ways to the top; one based on more functional elements (i.e. via performance associations and next judgements), one based on more emotional elements (i.e. via imagery associations and next feelings), and one mixing those functional and emotional elements.

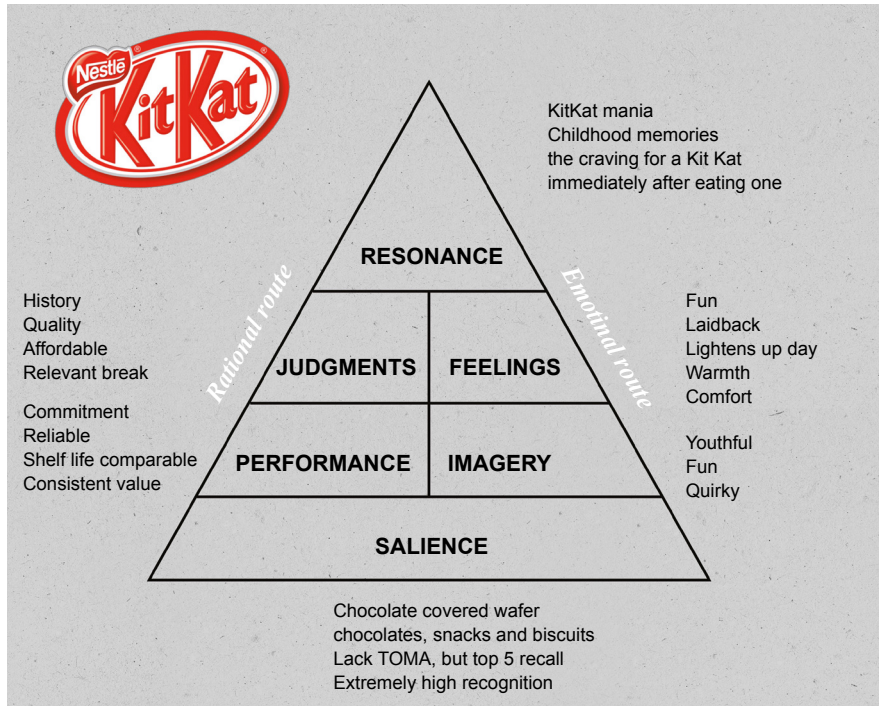
An application of the CBBE pyramid terminology to the brand KitKat is illustrated further (based on information and analysis about the brand available online). At the salience level, KitKat undoubtedly is recognized well as a brand. It has a medium-to-high recall or spontaneous awareness level. When thinking about chocolate snacks, KitKat may be one of the brands that is recalled spontaneously by a part of the target group, but other brands in the category may have a stronger (quicker) recall (e.g. M&Ms, Mars), so this may be a brand management attention point. Performance associations include an internationally standardized specific and unique taste expectation and a good (long) shelf life. It is also one of the lower-calorie-count chocolate snacks, which could possibly present a performance association to focus on in branding efforts, if relevant for the target group and in line with the



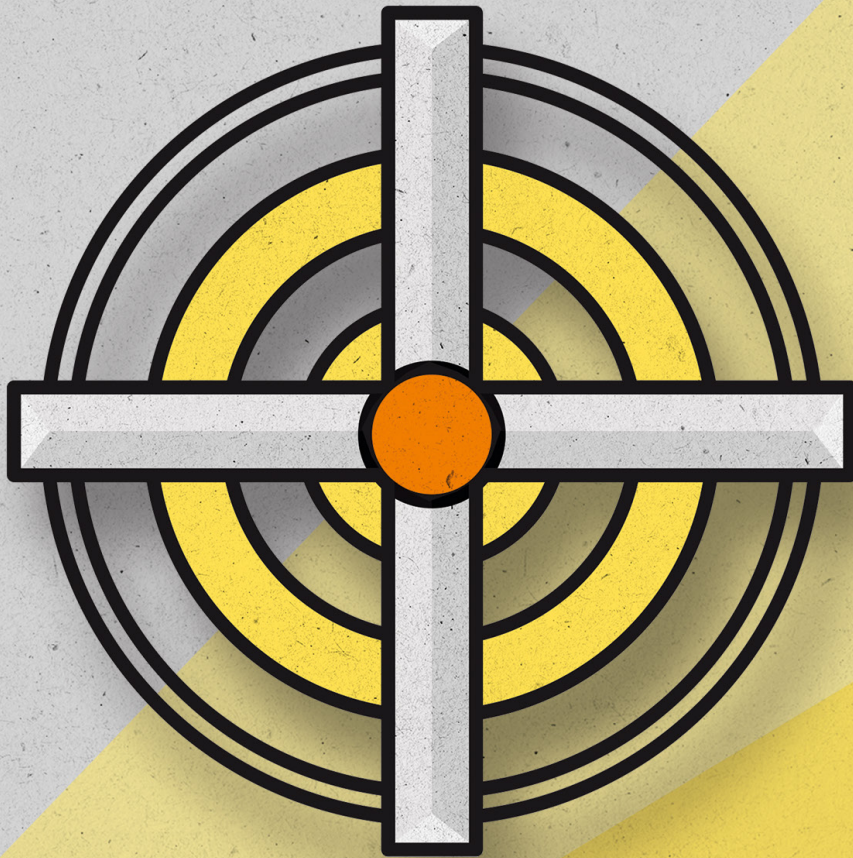
overall strategy. Brand judgements include appreciated affordability, quality and taste. Brand imagery elements from an emotional perspective could be 'being young at heart', 'for everyone' (which is part of the visual imagery in campaigns), and the daily consumption association triggered by the 'Have a break, Have a KitKat' slogan. Brand feelings are fun, carpe diem, relaxation, take a step back from the daily rush (cf. the link with the take-a-break campaigns). At the resonance level, one can refer to the KitKat 'mania' vibe that was present among KitKat consumers. The customer-based brand equity a brand aims for can be used to inspire brand campaigns. To illustrate, a retro brand campaign of KitKat is included that illustrates the fun, quirky CBBE feeling that KitKat aims to trigger.



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# THE CLASSIC RELIGION

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DIFFERENTIATION IS  
KEY THROUGH STP

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THE ONLY WAY

#3  
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TO BRAND EQUITY





# THE INFLUENCER RELIGION

The 'Influencer Religion' is a school of thought that gained momentum with the rise of social media. Marketers understood they were no longer a brand's sole owners, with consumers not only taking up a content-receiving role, but moreover a content-curation and even content-creation role (regardless of whether brands want it or not).

*“A brand is no longer what we tell the consumer it is; it is what consumers tell each other it is.”*

**Scott D Cook**, co-founder of Intuit

Today's consumers function as a brand's amplifiers, sharing what they think and feel with the people around them. This religion actively embraces the power of word-of-mouth, both offline and online, by actively fueling the conversation with and amongst consumers.

The 'Influencer Religion' is inspired by books like Jonah Berger's *Contagious*, Jennifer Aaker's *Dragonfly effect* (as a side note, Jennifer is 'Classic Religion's' David Aaker's daughter), Steven Van Belleghem's *Conversation Company*, Joseph Jaffe's *Flip the Funnel*, Malcolm Gladwell's *Tipping Point* and Andy Sernovitz' *Word of Mouth Marketing*, to name a few.



The 'Influencer Religion' can be summarized in the following three beliefs

**#1**  
CONVERSATIONS  
CUTS THROUGH THE  
CLUTTER

**#2**  
MARKET THROUGH  
PEOPLE, NOT TO PEOPLE

**#3**  
NO CONTENT  
WITHOUT PURPOSE

**#1**  
CONVERSATIONS  
CUTS THROUGH THE  
CLUTTER

Conversations are this religion's currency. Its supporters emphasize that in this post-modern reality, which is characterized by brand clutter and cord-cutting (i.e. people stopping their cable TV subscriptions), brands no longer have a marketing monopoly.

People are increasingly being bombarded with advertising messages; experts estimate 4,000 to 10,000 brand and advertisement messages reach us on a daily basis (Red Crow Marketing, 2015). As consumers try to tune out this ever-growing marketing communication mass, word of mouth cuts through the noise quickly and effectively. Being perceived as more reliable, conversations break through this clutter. Research by InSites Consulting has shown how recommendations by peers are perceived as four times more reliable than those by companies. Nielsen's 2015 Global Trust in Advertising report found that peers are considered the most reliable source, with 83% of respondents trusting peer suggestions.

Word of mouth, ranging from face-to-face discussions over the dining table, to chats at the office water cooler, and interactions on social media channels, is a powerful force affecting how brands and products perform. Research studying 21 brands has revealed that 19% of purchase decisions could be traced back to offline and online conversations, with social media conversations and engagement contributing

for 9%, while 10% of sales could be linked to offline conversations (Fay, Larkin & Keller, 2019). Both offline and online conversations are core in influencing people's purchase behavior, yet the impact varies per product category. The research has also shown, for instance, that higher-priced goods and services are more prone to be influenced by offline conversations, which can be explained by the higher stakes and the need for people to deeply discuss pros and cons.

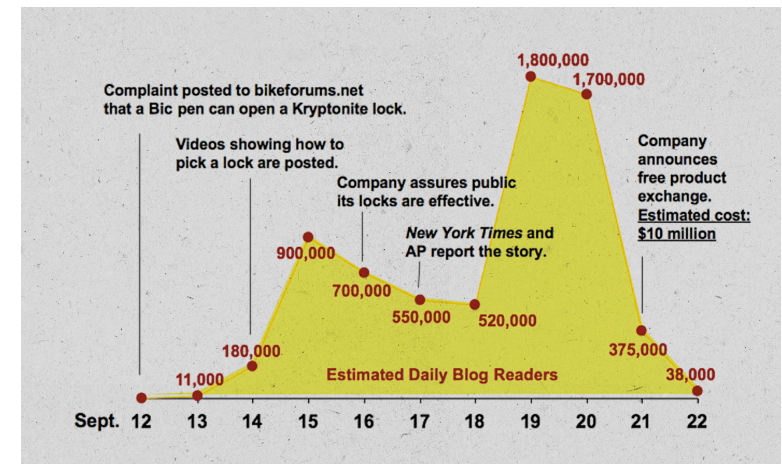
With the advent of Twitter and Facebook, social media can be considered as 'word of mouth on steroids'. Consumers are now the individuals that are broadcasting personal or second-hand stories to their social networks and the world. Everyone is a marketer; what we say, share and do can literally make or break brands.

*“The value of any customer does not reside only in what that person buys. In these interconnected days, how your customers feel about you and what they are prepared to tell others about you can influence your revenues and profits just as much”*

**Frederick Reichheld**, author & creator of the Net Promoter System of management

Just consider one of the earliest yet very strong examples out there: the 10-day story of Kryptonite. This bicycle lock brand was known as the ultimate anti-theft lock. In an early test, a bicycle was locked to a signpost in New York City for thirty days with thieves trying to strip and steal the bike while the Kryptonite lock resisted all attempts. Yet in September 2004, a cyclist discovered he could open his with a simple Bic ballpoint pen and posted this on a bike forum (the story goes that he got to his bike after a night out realizing he lost his keys, and he tried opening the lock with only a Bic pen at hand... which to his great

surprise worked). The story got picked up and people started creating videos showcasing the Bic trick. The company took notice, yet assured its locks were effective. Shortly after, the traditional media picked up the story. Kryptonite was forced to research the allegation in depth. In the end, the company recognized the issue and announced a plan for a lock exchange program. The cost of this program amounted to more than 10 million dollars, not considering the damage to the brand's so-called anti-theft image.



Tony's Chocolonely is a brand that is creating a movement through conversations. The Dutch chocolate brand was founded in 2005 after a Dutch TV journalist, Teun (Tony) van de Keuken, investigated the use of slavery within the cocoa industry, for a TV show. Teun decided to do something about it, yet when he approached some of the world's largest chocolate makers, they completely ignored him. This empowered the journalist to take action. He soon produced 5,000 of his very own fair-trade chocolate bars, which he branded 'Tony's Chocolonely' ('Chocolonely' refers to him feeling like the only guy (lonely) in the

chocolate industry to care about eliminating slavery). The brand's ultimate mission is to make all chocolate in the world slave-free, a fight that cannot be won alone. The brand's marketing strategy is centered around fueling conversations and building a tribe of active consumers who will raise their voice to support this anti-slavery mission. Fueling the conversation is an active ingredient of the brand's product and marketing strategy. It starts with the bars themselves, which are chunked unevenly, visualizing the unequal profit divide in the industry. When sampling, the company always gives people two samples. One for themselves to taste and enjoy the slave-free chocolate, and the other to share with family and friends (and with that also sharing the Tony's Chocolonely story).

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*“We can’t do it alone. Alone we make slave-free chocolate, but only together we make all chocolate 100% slave-free. In the coming years our focus will be on creating a movement of friends that want to join us. We are actively looking for partners to follow our model and we want you to join us too. The more people choose slave-free and share our story, the sooner slave-free becomes the norm in chocolate. The choice is yours. Are you in?”*

**Teun van de Keuken**, Tony's Chocolonely

With a turnover of €70 million, Tony's Chocolonely is now the biggest chocolate brand in the Netherlands, with a market share of around 19% and a 27% growth in 2019. 88% of sales happen in the Netherlands, yet the brand is expanding and growing its presence in Belgium, Denmark, Germany, Finland, Sweden, the UK and the US (Forbes, 2019).

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## Research Implications and Applications

Research can help understand and map consumers' conversations about a brand, category or product. Social Intelligence is an interesting technique in this space, and includes a combination of social-media listening, search-term analysis and social ethnography. Social Intelligence is emerging as a faster, cheaper and in some cases better way of capturing 'conversation' insights.

Social-media listening and Google Trends analysis can provide a strong quantitative base for understanding and mapping the conversations around a brand or category, e.g. volume of brand mentions, associations, lexicon, types and tone of conversations, what content is being shared, where and with whom. Based on this data, we can build a picture of how consumers perceive and talk about brands, competitors and brand activations on their digital networks. One of the core benefits of this approach is the data's authenticity; consumers' unpromoted posts on social media genuinely reflect how they felt in the moment of receiving a brand activation. This foundation can then be overlaid with a more 'human' qualitative interpretation of consumers' conversations to understand the context, themes and emotions at play.

*Lastly, tracking and analysis of competitor activity allowed benchmarking Standard Life's social content against its competitors', based on follower numbers, impressions, likes and shares. Validating the findings quantitatively and adding context with specific trends research, the research piece provided clear guidance on the social platforms Standard Life should prioritize, the information it should provide to its consumers, the best content formats for delivering this information and key learnings from competitor activity.*

## #2

# MARKET THROUGH PEOPLE, NOT TO PEOPLE

The 'Influencer Religion' emphasizes that the change in media climate requires brands to move from 'marketing to people' to 'marketing through people'. It is about building a connection with the people that can create visibility for a product or service. Unlike marketing approaches that focus on the masses (as in the 'Classic Religion' and the 'Penetration Religion'), this approach focuses on the select few, even hand-picked disciples that can help create a ripple effect around a brand (message).

Nintendo applied this practice with the introduction of the Wii gaming consoles, recruiting a handful of tech-savvy moms, so-called 'alpha moms', to share the console with their friends, Tupperware-party style. The alpha moms' goal was to get the Wii controller in the hands of non-gamers, as part of Nintendo's strategy to broaden its appeal beyond young men that often resent new gaming systems. And successfully so; the Wii became the most sought-after electronics item among Internet searchers (with searches outnumbering those for the PlayStation 3).

### CASE

#### How Standard Life identified the right content for its audience

*Standard Life, a life savings company, wanted to refresh its social media content in order to increase audience engagement, by building trust and bringing consumers closer to the brand. They wanted to investigate how different aspects of one's financial lives are discussed online (savings, pensions, financial advice etc.). In order to get a 360° view of what engages people online, a combination of a social intelligence approach with an online survey and an analysis of wider market trends was set up.*

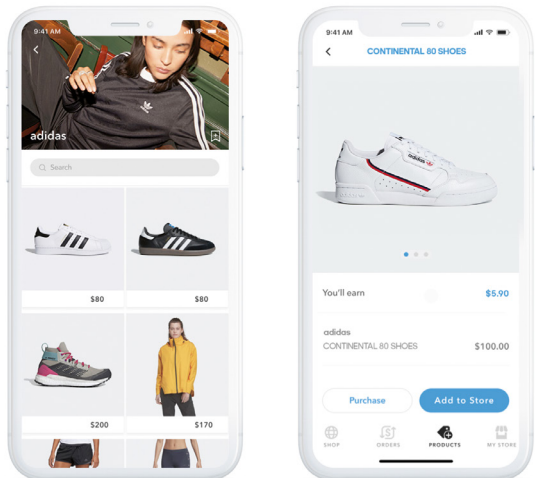
*Search data analysis helped to identify several core information needs which could be addressed via social media content, presenting an opportunity for the brand to gain further presence within its target market's digital journeys (maximizing SEO). Qualitative analysis of forum discussions allowed to identify key themes, including brand sentiment and consumer pinch points around the brand's product offering, as well as initial insights around key competitors.*



Adidas even took this one step further, by democratizing influencer marketing and involving fans in telling as well as selling. Its initiative went beyond just involving (micro-)influencers, as it permitted fans (regardless of their audience's size) to sell Adidas products in their own online stores.

*“If you think about where our consumers go to get advice or ideas, it’s their friends, it’s sneaker heads, it’s people already in their social sphere, so why not let those people sell on our behalf?”*

**Chris Murphy**, Senior Director Digital Activation at Adidas



The sportswear brand invited 10,000 of its Creators Club members (a free-to-join program where members receive award points and access to exclusive drops based on their reviews) to become ‘social sellers’. This was done in partnership with Storr, a social-commerce app that allows anyone to open a digital storefront, where users put the products up for sale, and with every sell receive a 6% commission or donate it to ‘Girls on the Run’, an Adidas partner charity.



Influencer ‘disciples’ can range from regular customer, niche bloggers and vloggers to well-known celebrities. Yet recent years have seen in shift in influencer amplitude. There’s Ryan. Like most children, Ryan loves playing with toys - from cars, trains and Lego to Disney toys, Play-Doh and Minions. But unlike most kids, he’s playing with those toys for an online audience of millions. What started rather innocently, with his mom and dad filming Ryan unboxing toys, is now a multimillion business model. End 2019, Ryan Toys Review had 21.6 million sub-

scribers and 32.1 billion views on YouTube. Aged only 8, Ryan is the world's top earning YouTube star, making 22 million dollars in a single year. Today Ryan's brand has turned into a multimillion-dollar franchise, with his face on the shelves of Walmart, on toothbrushes, and on TV.

However, the selection of influencers requires caution, since their behavior and reputation - positive and negative - will be transferred onto the product and service. Reach (breadth and depth), expertise and willingness to share their experience are key criteria when recruiting a brand's amplifiers. The influencer approach can be very valuable for brands working in a B2B environment where traditional advertising is often less effective (or even nonexistent). According to Harvard Business Review, 84% of B2B sales begin with a referral (Harvard Business Review, 2016). The business magazine also highlights that peer recommendations influence 90% of B2B purchase decisions. Yet a referral strategy or influencer approach can also be of value for start-up and underdog brands that are still in the 'infancy stage'. Brand disciples can help create a grapevine or snowball effect, in particular when a company does not have the means, network or reach to push a product to the market with a big bang.

A brand that introduced itself to the market using the 'Influencer Religion' approach is OnePlus. The smartphone market is a hard-to-enter market for a new player, with severe competition from big established players like Apple and Samsung. In 2014, OnePlus entered the space through an invite-only sale, where people could only purchase a OnePlus if they had received an invite. These were distributed through contests, tech experts or people that had already bought a OnePlus. This system allowed the brand to spread through peers while also avoiding the risk of having too much stock. The strategy created a huge ripple effect and resulted in OnePlus becoming the respected 1.9 billion US\$ brand they are today.



## Research Implications and Applications

Social Intelligence, a combination of social media listening, search term analysis and social ethnography, can aid strategy development in terms of identifying the key influencers for a brand, category, market or trend. This can be combined with consumer research to assess and validate which influencers/ individuals/ partner brands/ events... are a permissible and positive fit for the brand.

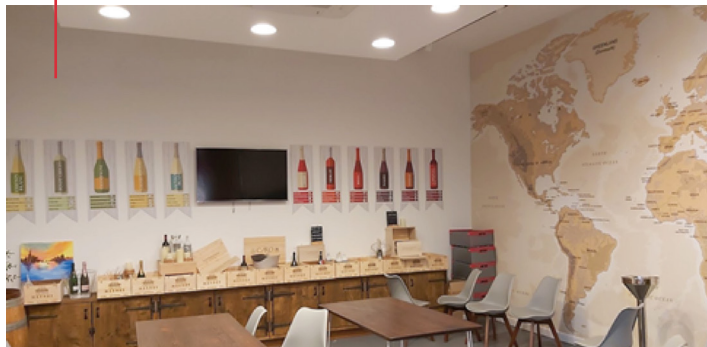
However, not all conversations about brands take place online, and this is where trend research steps in. Through desk research and in-market safaris, we can bring to life how influencers and trends manifest themselves in the real world (which is especially of use for niche brands and early-stage audiences).

## CASE

### How Laithwaite's Wine grew its appeal by involving leading-edge consumers

*UK-based Laithwaite's Wine was founded more than 50 years ago with a very specific insight: great wines simply cannot be mass-produced, but farmers working on a smaller scale don't have the means to introduce their wines to the mass market. Laithwaite's remedied the market-introduction issue with their personalized offering, which proved to be hugely successful. However, in a changing marketplace, a greater inter-generational appeal was needed. But where to start?*

*We first identified a set of target trends with a strong appeal among both younger and older consumers. These trends were then applied to the wine industry via trend mapping and qualitative exploration with leading-edge consumers. This uncovered twelve key opportunity areas for Laithwaite's Wine around how the trends are manifested within the wine industry. To apply the trends, an ideation workshop was organized, bringing the trends to life via immersive presentation and stimulus boxes, so stakeholders could fully experience the trends for themselves. The research team facilitated creative-idea-generation exercises tailored specifically to their business challenge, resulting in four unique concept areas and a set of applied consumer trends to refer to day-to-day within the business.*



## #3

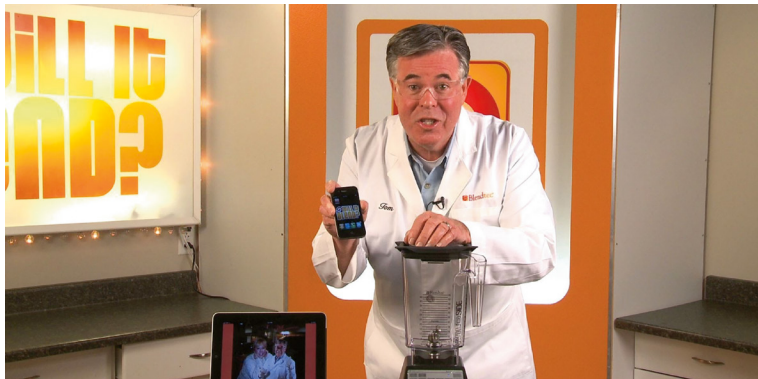
# NO CONTENT WITHOUT PURPOSE

With conversations being the 'Influencer Religion's' currency, brands need to have a conversation-first mindset and action plan. According to the Havas Media report of 2019, 58% of the content created by the world's leading 1,800 brands are poor, irrelevant and fail to deliver (Havas Group, 2019). In a world of content overload, where every minute of the day more than four million videos are added on YouTube and 49,000 photos are posted on Instagram, the act of carefully considering conversation content increases in importance. Brand conversations should be relevant and serve a purpose. Or as Jonah Berger puts it, conversation content becomes contagious if it is STEPPS. In this acronym, the initial S stands for Social currency, which refers to the fact that those that talk about a brand or share its content should feel special. T is for Trigger: good content is associated with ideas, activities or occasions in people's lives; this will keep the brand top of mind. The E refers to Emotions: when we care, we share. The first P stands for Public, as the content should be publicly available so people can copy it and make it their own. The second P goes to Practical value: good content equals useable news. Lastly, the final S stands for Stories; good content wraps the product or service in a shareable story or narrative.

An example of a brand that succeeded in creating contagious content is Blendtec, a company that sells professional and home blenders. The story goes (and this brings us the final S in STEPPS), one day George Wright, a new marketing hire, walks into the office and notices a pile of sawdust on the floor. When asking about it (assuming it's the



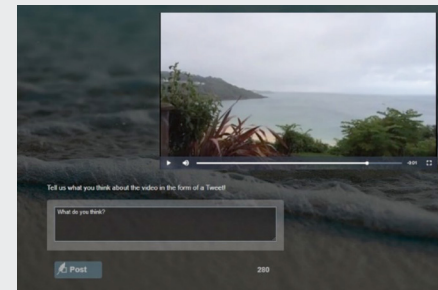
residuals of some office refurbishing efforts), his colleagues tell him it is the result of the CEO's daily activity (and personal challenge) of trying to break the blenders. Every day the CEO would take a random object and throw it in the blender, to see if the blender would break. This gave George an idea: with a 50\$ budget, he bought a white lab coat and a pair of safety glasses, and he started filming the CEO doing what he was already doing: trying to break blenders... They sent the hilarious videos to their mailing list and before they knew it, it caught on like wildfire. People saw the videos and wanted to share them with their friends (or the first S in STEPPS).



### Research Implications and Applications

A research application which identifies whether conversations are purposeful is 'conversation mapping'. Whatever the scenario or brand execution, consumers are invited to phrase what they would say, whom they would say it to and in what context. This is quite a structured and

heavyweight approach, sometimes resulting in a form of digital segmentation (as illustrated in the Twitter case below). A much simpler approach for testing the likely social WOM that a brand activation might generate is to mimic what people would say or share on Facebook or Twitter. Participants see stimuli and are then invited to create a Facebook status update/ Tweet which they would share as a reaction (whether it would be shared at all, with whom... could also be captured).



### CASE

#### Identifying conversation drivers on and for Twitter

*Twitter wanted to understand what motivates its audience and how brands could best engage with them. Using a combination of cutting-edge data science analysis and primary market research, the research identified 75 subcommunities, four of which were examined in detail: Health, Music, Football and Gaming. A hybrid approach was used, including data analysis of follower graphs and bios, online diaries, in-depth interviews, cultural analysis and a quantitative survey (n=1,500) to ensure the richest and most robust results. The analysis uncovered the unique roles that Twitter plays within each community and the reasons why people engage with them. These included feeling part of a broader conversation, staying connected, and accessing up-to-date information and news. Discovering entertaining content and receiving*

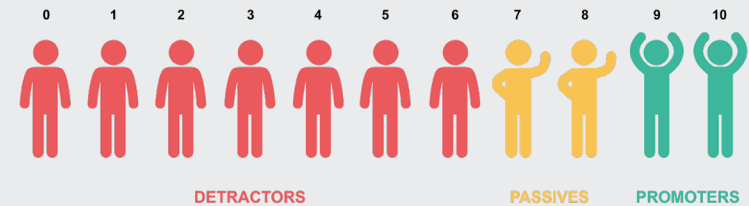
*emotional support came next in the list, and finally, the opportunity to influence others. For brands, the research identified what they can do to ensure being successful when getting involved with these communities.*

The goal in influencer marketing is to create a snowball or ripple effect, with people talking about and sharing brand and product experiences. Whether offline or online, recommendations play a key role in purchase decisions. According to Nielsen and Roper reports, 92% of all consumers report that a word-of-mouth recommendation is the 'leading reason why they buy a product or service'. Similarly, reviews are impacting people's decision-making process. A report published by Spiegel Research Center shows that 95% of shoppers read online reviews before making a purchase (Spiegel Research Center, 2017). The power of a written review is also visible in a B2B environment, where research found that 92% of B2B buyers are more likely to purchase after reading a trusted review (G2, 2018).

## Research Implications and Applications

A key metric for measuring success in relation to this belief is the likelihood that people recommend the product, and this is where the NPS (Net Promoter Score) comes in. This metric, originally defined by Frederick Reichheld in collaboration with Bain & Company and Satmetrix Systems, measures the likeliness of people to recommend a product or service to family and/or friends. This is measured on an 11-point scale from 0 to 10, and provides a score when deducting the detractors (those attributing a score from 0 to 6) from the promoters (scoring 9 or 10). The NPS can be as low as -100 (everybody is a detractor) or as high as +100 (everybody is a promoter).

NET PROMOTER SCORE = % PROMOTERS - % DETRACTORS



Brands and organizations following the 'Influencer Religion' strive to create promoters amongst both customers and employees. Net Promoter Score enthusiasts say high-NPS customers stay longer, spend more, give feedback and praise products to friends and family. Examples of companies with a high NPS in 2019 are Starbucks (77), Netflix (68), Tesla (96), Airbnb (74) and Amazon (62). These scores clearly match a brand's level of awareness and reflect customer retention and growth.

## CASE

### How NPS serves as a barometer for Mobile.de

*Mobile.de, Germany's biggest online vehicle marketplace, finds it important to keep a finger on the pulse when it comes to their platform performance. For both buyers and sellers on the platform, the company measures the extent to which users would recommend the site ('Wie wahrscheinlich ist es, dass Sie mobile.de Familienmitgliedern, Freunden oder Bekannten für den Autokauf empfehlen?'). Mobile.de's NPS has been tracked for years, and serves as a barometer when changes are made to the platform. While Mobile.de is performing well, the brand feels the need to keep track of the recommendation power. Mobile.de sees it as a reflection of the consumers' raising standards, a result of the online vehicle marketplace having reached maturity in the market.*



# THE INFLUENCER RELIGION

#1  
CONVERSATIONS  
CUTS THROUGH THE  
CLUTTER

#2  
MARKET THROUGH  
PEOPLE, NOT TO PEOPLE

#3  
NO CONTENT  
WITHOUT PURPOSE



# THE RELATIONSHIP RELIGION

The 'Relationship Religion' is centered around the belief that people feel a deep emotional affinity with brands, resulting in brand-consumer relationships. Supporters of this brand strategy highlight the importance of building a long-term relationship with consumers, as this leads to loyalty and positive sales results.

The 'Relationship Religion' is inspired by thought leaders and their publications, such as Kevin Roberts' *Lovemarks*, Susan Fournier's work on consumer-brand relationships, Tim Halloran's *Romancing the brand: how brands create strong, intimate relationships with consumers*, and books like *How Cool Brands Stay Hot* by Joeri Van den Bergh and Mattias Behrer, just to name a few.



The 'Relationship Religion' can be summarized in the following three beliefs

### #1 EMOTIONS GUIDE ACTIONS

### #2 CREATE AN IDENTIFIABLE IDENTITY

### #3 BUILD LONG- LASTING LOVE

## #1 EMOTIONS GUIDE ACTIONS

Research has shown that if the brain's emotions centers were damaged, people would not only lose their ability to laugh or cry, but also to make decisions (Seymour & Dolan, 2008). Emotion and reason are intertwined, but if in conflict, emotion wins. As demonstrated in a recent BBC Two documentary (see below), researchers are still debating about what percentage of our decisions are taken implicitly, automatically, intuitively.... Nonetheless, they are unanimous that the far majority (according to some even 95% or more) of our decisions are less considerate than thought previously.



When making a decision, one does not say 'What do I think about this', but rather 'How do I feel about this'. Therefore, emotions are a serious opportunity to drive consumer behavior.

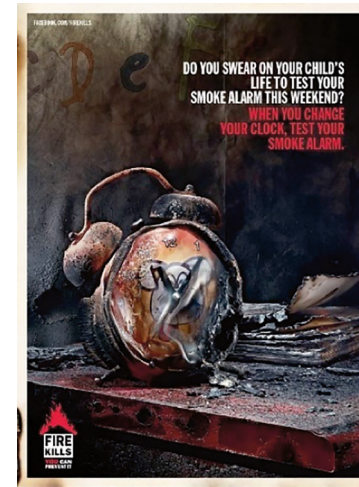
*“Emotion leads to action, while reason leads to conclusions”*

**Donald Brian Calne**, Canadian neurologist

For years, researchers have tried to pin down an exhaustive list of emotions. Paul Ekman’s thinking (first defined in 1984) that there are six universal expressions of emotion, namely happiness, sadness, fear, anger, surprise and disgust, is still dominating. This theory treats these feelings as unconnected islands, building blocks which can be the foundation of more complex emotions (e.g. the emotion ‘anticipation’ can be broken down into fear and happiness).



Emotions are powerful attributes in branding and advertising. A study by Pringle and Field, using a database of 1,400 advertising campaigns, has shown how campaigns with purely emotional content significantly outperform those with only rational content (31% vs. 16%) in terms of effectiveness (Pringle & Field, 2008). Emotional-only campaigns also do slightly better than those with mixed emotional and rational content (31% vs 26%). The researchers attribute this to the fact that our brains are better at recording emotional stimuli.



While it is common to play on positive emotions, one can also find examples of brands tapping into the other end of the emotional spectrum. Depending on the category, product or objective, even playing on negative emotions can create the desired effect. Fear, for example, is used effectively to discourage certain behavior (e.g. anti-smoking campaigns or campaigns promoting smoke detectors). The use of fear is often coined as ‘fear appeal’ and ‘shockvertising’ in advertising.

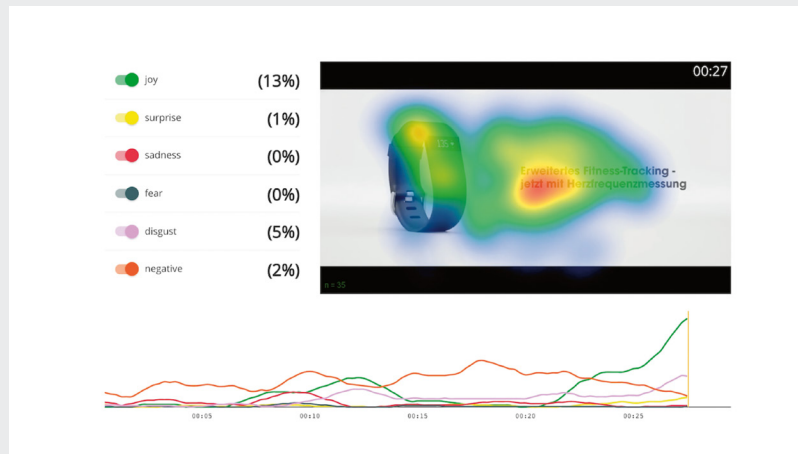
## Research Implications and Applications

Within the ‘Relationship Religion’, the key metrics for evaluating advertising executions relate to consumer emotions. At InSites Consulting, we use different tools and techniques to understand the emotions conveyed by an ad. With emotions being typical ‘type-1’ processes (i.e. processes that emerge at a more unconscious level), using measurement techniques that avoid (over-)rationalization can be beneficial.

An example is our Implicit Association task, a time-pressure-based research activity where the spontaneous emotional associations with an ad are captured. This method filters out over-rationaliza-

tion, which is useful when wanting to measure the prompted implicit emotional associations linked to a stimulus. An alternative that produces comparable results is our proprietary 'Pulse tool'; participants press their keyboard's left and right arrow keys to indicate their (dis)liking when watching an ad (extract). The result is a curve visualizing the level of positive and negative emotions throughout the spot, highlighting potential areas for ad optimization.

Another approach for capturing emotional reactions is to harness the world's fastest growing language of emojis. In the right context (audience, brand and subject matter), emojis can contain and express nuances in emotions that consumers cannot or are not prepared to fully express in words.



## CASE

### Understanding which emotions boost donation intention

*An example of an emotion-focused analysis to optimize brand executions is a project executed by InSites Consulting for a global NGO that wanted to understand which print communications worked best to motivate people to donate. A first phase was to identify the (emotional) drivers for donating. The second phase looked at capturing the emotions triggered by the different ads. This was done through a time-pressured Implicit Association task, where people were invited to indicate the emotions they linked to the ad. Matching the results from the Association task with the driver analysis enabled us to understand which ads work best. The research also found that stimuli showing volunteers helping people in need outperformed those only showing people in need. A possible explanation of the better performance of the former is that it shows that something is being done with donations, and that donating leads to change and action.*



## #2

# CREATE AN IDENTIFIABLE IDENTITY

The 'Relationship Religion' preaches the benefits of building an emotional connection, a relationship with consumers. Research has shown that consumers do feel some affinity with the brands around them and that these relationships conform with what one can find in the interpersonal relationship space. Miller, Fournier and Allen identified different brand-consumer relationship types that link closely to our everyday, interhuman relationships. Marriages, best friends, acquaintances, adversary relationships, even flings represent different connection levels between consumers and brands. Despite what marketers might think, all relationship types are valuable. A 'best friend', a 'fling', or even an 'adversary' relationship may pay off. Research highlights how only 7% of brand flings are based on a single purchase, with 26% of consumers even staying with the brand for several years (Fournier, Breazeale & Fetscherin, 2013). Especially at the start of the fling, consumers exhibit very frequent brand usage. One could argue that a fling is a stepping-stone towards a longer-term relationship.

Yet, regardless of the relationship type, building a consumer-brand connection starts with building a strong brand identity that consumers can relate to, and even identify with. The core is to know oneself as a brand. Even before meeting the consumer, you must fully understand yourself. If you don't know who you are and what makes you different, better or special as a brand, how do you expect consumers to know?

In the early '50s, psychologist Carl Jung presented the notion of twelve psychological archetypes, each representing powerful identities with their own set of characters, values, attitudes and behavior. Mark and Pearson, authors of *The Hero and the Outlaw*, use those twelve archetypes to frame brands, consumer markets and individuals. These archetypes can be grouped into clusters based on two dimensions (Mark & Pearson, 2001):

- The need for belonging and enjoyment vs. independence and fulfillment
- The need for stability and control vs. risk and mastery



Strong brands can be associated with one dominant archetype, yet this archetype is not necessarily sector-specific. A given sector can contain brands with different archetypes. Consider the car industry, with brands like Tesla, Volvo and Volkswagen. Tesla is rather the 'creator', striving to be at the forefront of innovation in terms of driving mechanism, as well as in the features and service aspects it introduces. The brand recently introduced the 'dog mode' feature, for example, which aims to





keep unattended pets at a comfortable temperature in a vehicle while also informing passers-by of their safety. Volvo on the other hand is more in the 'caregiver' space, taking a stand in safety aspects with claims like "By 2020 no one should be killed or injured in a new Volvo". Volkswagen represents 'the sage, the everyman', emphasizing to be a car for everyone (which is also what the brand name implies, as translated from German it reads 'a car for the people').

Once brands have defined what they stand for (i.e. their archetype), it is time to define their consumer type. Every brand has an ideal consumer that feels the brand was made for them. Brands need to identify that ideal consumer and their functional, emotional and social needs, and match those needs with what they have to offer to that consumer. Identification is key in this context and as such serves as an important metric in this brand religion. Brand identification refers to the extent to

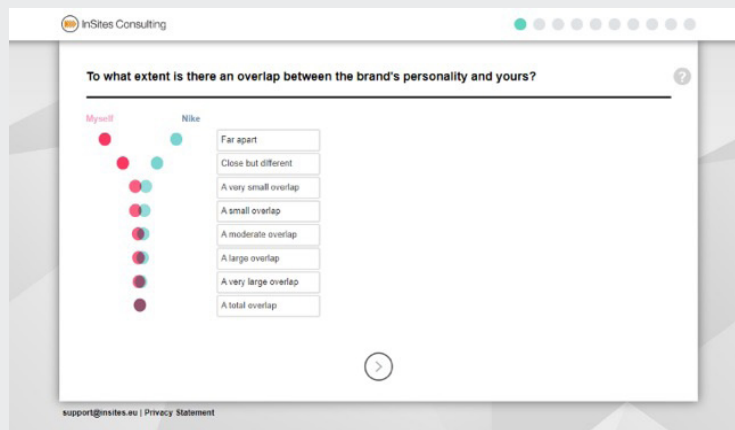


which a consumer recognizes an overlap between their own personality and a brand's. A concept also referred to as brand congruence, or the fit between the consumer's self and the brand; it has been proven to influence brand preference as well as purchase intention (Lam, 2012).

### Research Implications and Applications

Both qualitative and quantitative research can be used to assess the type, nature and strength of relationships which consumers feel they have with brands. However, 'being in a relationship' with a brand is an abstract concept, so online exercises using projective techniques can be an effective way of getting consumers to explore and map brands onto the Brand Archetypes and Fournier frameworks (e.g. personification, being the host of a house party where the brands are guests etc.).

Measuring consumer-brand identification or brand congruence is key when wanting to understand the extent and size of identity overlap. This can be done using metaphorical mapping techniques, such as placing brands on a target with the consumer ('Me') or a brand attribute as the bull's-eye. A similar technique is the use of a visual measurement scale, where both the brand's and the consumer's identity are visualized through circles, which line up from not overlapping at all, through some overlap, to a full overlap. Consumers then indicate the extent and size of the identity overlap.



### #3

## BUILD LONG- LASTING LOVE

Although there lies profit potential in all relationship types, the ultimate brand-consumer relationship scenario for many brands is a long-term commitment. Brands do not want to be a fling to everyone; the holy grail within this brand religion is to have a long-lasting bond with consumers: true love.

Rather than focusing on a short-term trial-and-acquisition approach, this brand strategy invests in a lasting relationship with the customer. Relationship marketing tries to foster customer loyalty for the long run; it is all about customer retention. Supporters of this religion emphasize the positive financial returns that come with this strategy. Research done by Dawkins and Reichheld shows how an increase in customer retention rates by 5% makes profits grow by 25% to 95% (Dawkins & Reichheld, 1990). Returning customers not only tend to buy more over time, the costs to serve them also decline. These financial effects are coined in the term CLV (Customer Lifetime Value), a metric indicating the value a business will derive from their entire relationship with a customer.

Consumers are important spokespersons for brands they love. Consumers that feel love for a brand are more likely to talk about it (Batra, Bagozzi & Ahuvia, 2012), functioning as brand ambassadors (taking us to the 'Influencer Religion'). Moreover, brand love will make people go out of their way to protect and support a brand. As Kevin Roberts puts

it: “Take a brand away and people will find a replacement. Take a love brand away, and people will protest”. Love, one could say, is loyalty beyond reason.

To strengthen the bond with consumers and leverage these effects, brands invest in all kinds of loyalty programs. Uber, for example, offers college tuition to its best drivers. The ride-sharing company launched ‘Uber Pro’, a reward scheme with four levels, each with different perks. With Uber Pro, drivers can unlock rewards like higher earnings, savings at gas stations, or free dentist visits. The two top levels of the program allow drivers (or their families) to enroll into online classes at the Arizona State University for free.

Yet, like human relationships, a brand-consumer love relationship comes with its ups and downs. We all know that love is hard work. Similarly, brands should actively try to keep the spark alive. People change, their expectations change and for brands to stand the test of time, they need to move along with these changing desires and behaviors. If not, the disconnection will grow and divorce will be imminent. A brand that failed to keep the spark alive is Abercrombie & Fitch. A&F always was a bold brand, marketing themselves as the cool kid on the block, selling to the cool and the good-looking. Yet A&F did not see how imperfect became the new perfect, and how the rise of individuality was reshaping the consumers’ needs and wants. At a certain moment, the target audience had enough of the perfect (unrealistic) six-packs, the half-naked torsos and the overly perfumed fitting rooms. Walking around with hoodies with a huge logo also no longer matched the definition of cool. Yet A&F was stubborn, with their former CEO Mike Jeffries even causing an outrage with a blunt comment during an interview: “In every school there are the cool and popular kids, and then there are the not-so-cool kids. Candidly, we go after the cool kids. A lot of people don’t belong [in our clothes], and they can’t belong. Are we exclusionary? Absolutely. Those companies that are in trouble are trying to target

everybody: young, old, fat, skinny. But then you become totally vanilla. You don’t alienate anybody, but you don’t excite anybody, either”. It is essential for brands to keep a finger on the customer’s pulse. Brands might undergo a shift (or gradual change) in identity (for a variety of reasons), yet so will consumers. What consumers want, desire and aspire today will be different tomorrow.

## Research Implications and Applications

As we explored before, projective techniques can be very effective to understand the abstract and potentially complex relationships that people can form with brands. Social media listening and monitoring is a cost-effective way of keeping on top of how consumers perceive a brand, by analyzing the sentiments in their conversations on social media, online forums, reviews or even Google search term analysis. A qualitative analysis of the data can also give an indication of the themes and reasons behind the sentiment (depending on the category).

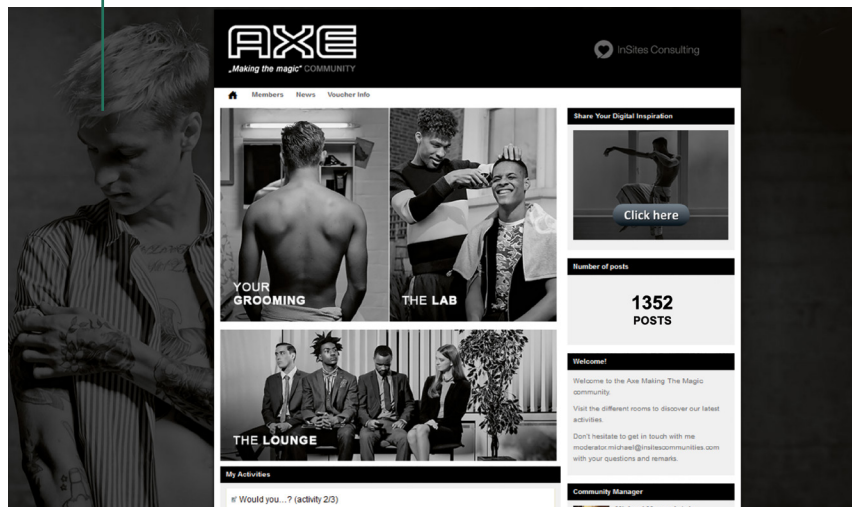
To gain insights into the why behind (changing) consumer behavior, one needs to deeply connect with consumers. This is where research communities come in. These online and mobile platforms allow brands to connect with consumers and engage them in activities to dig deeper into their needs and wants, as well as into the drivers of their behavior. At InSites Consulting, we built our own proprietary hybrid community platform to allow brands to connect with consumers anytime, anywhere. Our integrated suite of qualitative and quantitative research solutions and state-of-the-art tools and techniques results in deep consumer and contextual understanding.

## CASE

### How AXE/LYNX understood the changing meaning of masculinity

*An example of a brand that managed to keep the spark alive with its changing consumer audience is AXE/LYNX. If one were to ask what comes to mind when thinking of the typical AXE/LYNX advertisement, the answer would probably be 'a guy with a six-pack, chased by a group of gorgeous women' or 'a man spraying AXE/LYNX, making every woman in the street turns around'. Although that might have been the characterization of masculinity in the past, it no longer stands today. AXE/LYNX understands that the definition of masculinity has changed. To get a grasp of this new dynamic, they connected with their target audience in an InSites Consulting online community to better capture these changing ideals and understand what makes them tick. These learnings were incorporated in the brand's updated positioning and communication strategy, with 'the noise' being one of the first campaign executions expressing this new reality.*

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# THE RELATIONSHIP RELIGION

#1  
EMOTIONS  
GUIDE ACTIONS

#2  
CREATE AN  
IDENTIFIABLE  
IDENTITY

#3  
BUILD LONG-  
LASTING LOVE



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# THE EXPERIENCE RELIGION

Brands are operating in a market reality where entry barriers are lowering (more on this also in our Innovation Envy bookzine), and consumers experience an increasing (perceived) choice overload as they are overwhelmed by product and attribute options (Schwartz, 2004). This phenomenon creates a growing feeling of brand clutter, leading to decision fatigue or avoiding making decisions altogether (such as not buying a product) (Iyengar & Lepper, 2000).

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Enter the experience economy, a concept first coined by Pine and Gilmore in 1998, arguing that brands must orchestrate memorable events where the experience itself becomes the product (and brand extension). Experience marketing, also referred to as engagement marketing, live marketing or experiential marketing, is the act of letting an audience know, experience and connect with a brand, interactively and creatively.

*“Welcome to a new era of marketing and service in which your brand is defined by those who experience it.”*

**Brian Solis**, digital analyst, speaker and author

The goal is to ensure positive brand touchpoints for people while buying and experiencing the product and services, so beyond features, value for money or price deals. Research in service design indicates that customer decisions are driven as much, if not more, by memorable experiences than they are by a product's price and functional performance (Connell & Steward, 2016). This religion claims to facilitate the creation of a sustainable competitive advantage as products can easily be duplicated, whereas strong customer experience cannot.

Experience marketing has been gaining in popularity in recent years, especially amongst the younger experience-seeking generations. A study by Eventbrite found that 72% of Millennials prefer to spend money on experiences rather than on material things (Eventbrite, 2014). Yet it transcends age, with many (older) consumers also valuing experiences more than products and services.



The 'Experience Religion' can be summarized in the following three beliefs

**#1**  
MEMORIES OVER  
MERCHANDISE

**#2**  
INTERACT.  
DON'T ACT

**#3**  
CREATE LASTING  
IMPRESSIONS

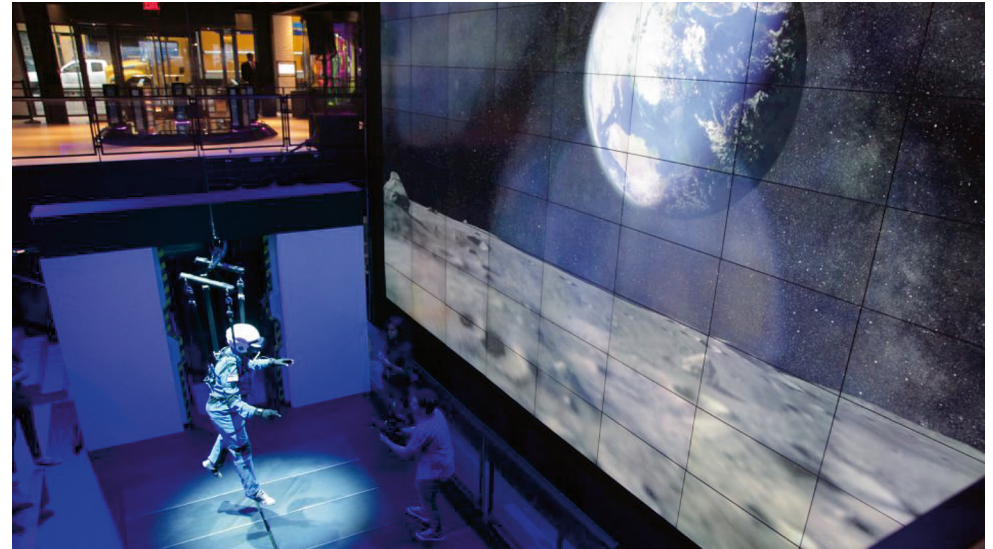
# #1

## MEMORIES OVER MERCHANDISE

The experience itself is this brand religion's currency, with the experience surpassing the actual product or service. A good product or service will always be important, yet here it rather serves as a brand's ticket to play and operate in the marketplace. What truly matters according to this brand philosophy is building a lasting and memorable connection with consumers, beyond the product.

Experiences transcend transactions; they provide a unique layer, allowing consumers to see and feel the brand. At its heart, experiential marketing is a marketing strategy geared towards promoting a brand's message, rather than towards focusing solely on selling a specific branded product or service. This is also what Samsung is doing with their Experience Stores. Samsung understood that the days are over when brands could attract customers by simply showcasing products. The current consumer generation does not enter a store to get information; this is something which happens earlier on in the customer journey (e.g. online). People are often well-informed before entering a store, and what they are looking for is a more experiential environment where they can see, feel and test the product. Samsung 837, located in the Meatpacking district in NYC, uniquely combines the latest technology with art, fashion and sport. It's not a store, but rather an experience center featuring Samsung's cutting-edge technology. People can for example try out the Samsung Galaxy Watch Active in a temperature-controlled workout, or experience the Samsung Galaxy S9+, or the Samsung Gear VR and immerse themselves in a visual and physical

VR experience that accurately recreates a fictional moon mission, allowing them to know what it feels like in lunar gravity.



To avoid brand attribution problems (i.e. the extent to which consumers link brand attributes and experiences to the wrong brand), a clear brand link is vital. Crafting an experience just for the experience itself is not sustainable; there always needs to be a relevant brand link so that the experience is transferred to the brand (and the other way around). Moreover, experience marketing goes beyond organizing a one-time experiential event; it should be scaled both in time and across touchpoints. Studies shows that a longer engagement equals a deeper experience (Smith & Hanover, 2006). Similar to crafting a content plan, where one pinpoints which messages and campaigns to release into the world, brands need to plan their actions and experiences across touchpoints. Next to that, it is about adopting an active problem-solving strategy.



Scaling an experience also means stretching the time consumers interact with the brand, beyond the actual 'brand consumption'. 'Live Today, Love Tomorrow, Unite Forever' is Tomorrowland's iconic slogan, with the brand stretching the experience from the moment people register to the after-movie that takes attendees back to the festival days, weeks and months after the festival. Once registered, the anticipation starts growing, with people looking forward to receiving the box with the unique festival entrance bracelet. For people with a travel package including Tomorrowland flights, the festival starts at pre-boarding with DJs playing beats at the check-in, and hostesses dressed in Tomorrowland attire. Once at the festival, every single detail builds up to the special Tomorrowland experience, where every part of the festival is decorated magnificently, from stage to toilets, so people are sharing pictures with the outside world. It's just one simple illustration of how 'today' can be stretched to several days or even longer before and after the experience.



## #2

# INTERACT, DON'T ACT

An essential component of experience marketing is the shifting role of the consumer, from a passive recipient to an active participant. It revolves around having a direct, real-time interaction with consumers, welcoming them into a multisensorial brand environment. This active involvement of consumers comes with two positive side effects. Firstly, brand understanding increases through participation; the more participatory the experience, the better the audience will understand the brand (Homburg, Jozić & Kuehnl, 2015). The second effect is a result of the emotions aroused by interactions; allowing consumers to interact with a brand entails a positive, emotional connection that traditional forms of advertising cannot achieve. A report by the Event Marketing Institute shows that 74% of consumers have a more positive opinion about company, brand, product or service after an event experience (Event Marketing Institute, 2015).

*“It’s not just about getting people into the environment, so they can see the brand, but getting them to be a part of the journey that makes it understandable, pleasurable and memorable.”*

**Chris Preston**, Managing Director, Freeman EMEA

It is about moving from storytelling (which closely links to the 'Influencer Religion'), over story-doing (which taps into the 'Relationship Religion') to story-making and co-creation, where the focus lies on expressing oneself as a brand and involving the customer while doing so. This is what the Bloomon experience is all about. Bloomon is a flower subscription company that started in the Netherlands and succeeded in reshaping the flower (subscription) business. Receiving a Bloomon bouquet is a whole experience and it all starts the moment the flowers arrive at the customer's doorstep. Don't expect to simply drop the Bloomon flowers in a vase; Bloomon's recipe for success lies in the bouquet arrangement where the customer is in the lead. The carton wrapping that holds the flowers also includes must-read instructions to craft the perfect bouquet. Since every flower in the bouquet is unique, and every receiver uniquely builds their own bouquet, the end result is different for every Bloomon customer. Core here is the whole user experience; customers even receive timely mobile alerts on when to change the water in the vase. Bloomon is successfully expanding the formula to other markets like Germany, Belgium, the UK and Denmark, and has already extended the experience formula by organizing flower arrangement workshops.

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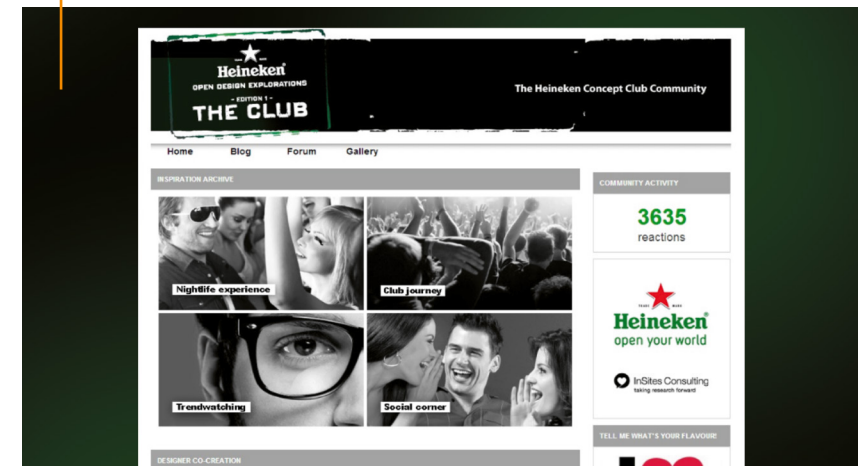


## CASE

### Co-creating the Heineken Club Of The Future

*Heineken, the Dutch brewing company ranked third largest brewer in the world, organized a global design project to shape 'the club of the future'. The initiative invited talented emerging designers from around the world to co-create this new clubbing concept. The project started with a 3-week 'Getting Close' online consumer immersion community with 120 design-savvy clubbers, to gather needs, perceptions, experiences and motivations linked to 'going out'. This served as both briefing and source of inspiration for the designers, that in fact built and showcased the Concept Club at the Salone del Mobile 2012 in Milan. The insights from the community challenged designers to explore solutions to frictions in club design, and to delight the crowd by truly understanding the brand experience. An example is the long wait at the bar breaking the moment and serving as frustration point in the total experience. The Concept Club included interactive bars that dealt with this specific friction. In keeping the balance between triggering the senses of the individual and encouraging social interaction, Heineken is co-creating a nightlife experience to remember.*

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# #3

## CREATE LASTING IMPRESSIONS

The success of experience marketing doesn't lie solely in its power to cut through the traditional branding and communication clutter; it has the great potential to stick, to be memorable. Ultimately, that's the goal of experience marketing: create lasting impressions. Just as in the 'Relationship Religion', emotions are important to create memorability, but the difference is that it is about having a proactive strategy to promptly create positive emotions in terms of delight and surprise. Positive great experiences generate the richest pay-off as they inspire to purchase. Next to that, memorability leads to multiplier effects in a connected world (Thomke, 2019), where people will talk about the brand after the experience ended (which would bring us to the 'Influencer Religion'). We found that three key elements impact (and can extend) memorability:

**MEMORABILITY = SPECIAL X SENSES X STUN**

### 1. SPECIAL

Exclusivity is a powerful weapon in experience marketing. To be memorable (and shareable), experiences must align with the unique needs, wants and desires of individual customers. No two people wish for or should have the same experience. It's about adapting the brand experience to each consumer in particular, where people can engage in the experience in different ways and lengths, and feel special. This pairs

closely with personalization and customization. Not only do more and more consumers expect it, people are no longer impressed by standardized marketing messages, products and services.

Levi's, leading by example in creating personalized and customized retail experiences (and therefore also products) with their tailor stores where people can have their jeans altered, took the exclusivity dimension to a whole new level. Available in London, NY and San Francisco is a next-level tailor shop: LOT NO.1, making jeans to order. Guided by the Levi's master tailor, customers are fully immersed in a one-on-one design experience where they can choose from a wide range of rare denims and fabrics, resulting in a one-of-a-kind handmade pair of Levi's that is 100% personalized. The finishing touch is the customer's name and edition number stamped on the inside pocket.



## 2. SENSES

Experiences that trigger one's sense also contribute to memorability. All raw information enters our brain through our senses, where our five senses - sight, hearing, touch, smell and taste - act as learning portals. In fact, the part of the brain that is responsible for interpreting these senses (the hippocampus) is also responsible for memory (Smilansky, 2017). This is why people will remember experiences that tap into multiple senses better than those where they were exposed to only one.

Many sensory marketing efforts focus on sight, sound or smell; however, touch is proven to be an essential, yet often forgotten sense (Smilansky, 2017). Even in times when the online channel is growing rapidly, touch and physical handling are key. Many retailers are reintroducing brick and mortar stores (e.g. pop-up shops) to allow consumers to touch and feel their products. Touch has the power to create some psychological sense of ownership - physically holding a product can drive this 'must-buy' feeling. This is also what explains the shift in product display strategies amongst retailers like Apple store and Best Buy, where products have been moved out of display cases. The premium supermarket chain Waitrose introduced their own gardens and vertical farms in-store at the end of 2019, where people can hand-pick their own vegetables. This initiative taps into the need for a more sensorial retail experience as a reaction to the rise of Amazon and other online retailers.

By appealing to the consumers' senses, brands are tapping into one of the most effective ways to encourage interaction and memorability. While each of the senses has its own strength, the power lies in their combination. This is where synergies come into play, as, when combined consistently, they amplify each other and fuel increased memorability. This multisensorial experience is also what Voyages-SNCF, the French

railway company, aimed for with their 'Les Instants V' campaign that promotes a new event-and-train combi package; Voyages-SNCF put up a range of larger-than-life billboards in Paris which highlighted the many different forms of entertainment in their offering. Through the billboards, passers-by could feel, touch, see and hear the diverse events and attractions. The billboards included a gigantic opera singer's mouth belting out melodies, a super-sized touchable Marilyn Monroe skirt blowing in the wind, and a water-splashing rugby player in the shower.

External aids can amplify the experience's memorability, where 'phygital' (i.e. physical combined with digital) tokens function as souvenirs that anchor the memory of the experience. Physical evidence associated with an experience is found to lengthen memory retention (Smilansky,



2017). Brands should leverage these external aids, which can range from physical items (e.g. the leather festival (entry ticket) bracelets that Tomorrowland visitors keep wearing long after the festival) to digital tokens (e.g. an amusement park sending a ‘throw-back’ picture of a visit). These tokens make the experience accessible long after the actual experience. Sony’s ‘Lost in Music’ pop-up in NYC features an interactive experience that generates an individualized ‘MeMix’ music track for each visitor. Powered by cutting-edge Sony technology, a unique tune is created based on a visitor’s personal rhythm and interactions. The visitor’s body language is translated into a musical track that’s matched to the rhythm of their heartbeat. The personalized track is then made available for download, for visitors to take with them.



### 3. STUN

The most basic way to get someone’s attention is to break a pattern. People quickly adapt to patterns (which is also the reasoning behind the auto-pilot (purchase) behavior in the ‘Relationship Religion’). Yet whilst being creatures of habit, our brains are wired to detect change

(Heath & Heath, 2006). Surprise gets people’s attention, violating people’s expectations and giving them something they don’t expect. Research shows that when people are surprised, they raise their brows, which causes the eyes to widen, providing a broader field of vision. Paul Ekman and Wallace Friesen coined the term ‘surprise brow’ to describe the facial expression of surprise where the eyebrows move into a high curve (Ekman & Friesen, 1975). The surprise brow is our body’s way of forcing us to see more; the extra attention logs a better record of unexpected events into our memories.

When building a brand experience strategy, brands can benefit from incorporating random acts of surprise. Important here is to diversify these surprise acts so people are not exposed to the same element twice (Smith & Hanover, 2006). If not, the surprise effect and its benefits will be lost. Mastercard has been running a long-term program based on the idea of rewarding customers with great surprises. The ‘Priceless Surprises’ campaign is set out to surprise cardholders when they least expected it. These spontaneous gifts range from small gifts like cupcakes from Magnolia Bakery to more extravagant ones like concert tickets and VIP celebrity meetings. To date, the #PricelessSurprises campaign has surprised 97,867 cardholders across 25 countries.

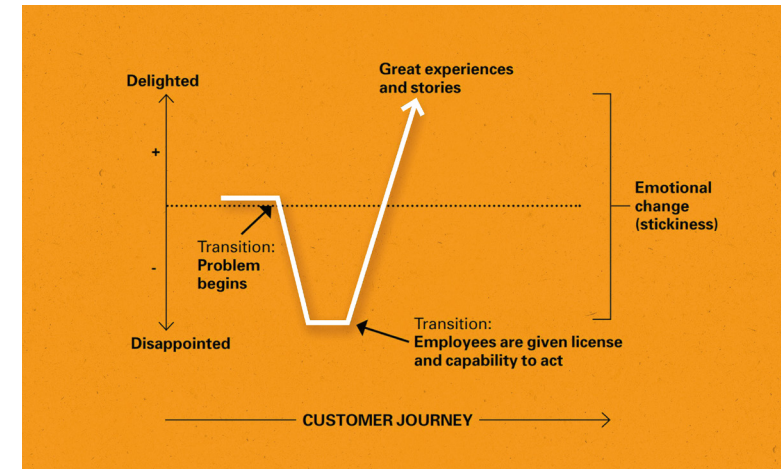
Although surprise does fuel memorability, it does not last. Surprise has an expiration date, losing all its power after its occurrence. Yet this is where a delighting strategy comes in. Brands should delight, as in going above and beyond in their customer experience. Delighting is about consistently trying to exceed people’s expectations. The opportunity space here is extensive, especially in the service sector where only 7% of consumers say that their service experience exceeds their expectations (Hubspot, 2019).

A fine example is the continuous delight efforts by Chewy, the online pet food retailer. They have always prided themselves on providing a personal touch with an impeccable customer service; they even send hand-written holiday and birthday cards. In an interview with Bloomberg in 2016, Chewy CEO Ryan Cohen said, *“We obsess over our customers, and we know the products better than any other pet store. Our focus is that if you’re looking for the best products, you call us, and we know it better. We obsess over fast shipping. We obsess over being competitively priced, and we’ve been able to do that at scale. And, we do all the small things right. This year we are sending out two million hand-written holiday cards that literally just went out on Friday. Being able to build special relationships with our customers has given us a really big competitive edge.”*



A product can be duplicated fast, but a strong delightful customer experience is difficult to copy. Yet, ‘outstanding customer experiences’ is more than service excellence. An active problem-solving strategy which promptly turns customer disappointment into delight in case of problems is key. While many customer care approaches focus on eliminating pain points and minimizing complaints, the ‘Experience Religion’ finds it is much better to maximize delight; it’s about stunning

one’s customers. But it does not all have to be fully scripted. Being able to delight customers can also be done by providing employees with degrees of freedom to turn problems into opportunities. The Oberoi hotels, for example, provide employees with a budget to create moments of delight. In that context even negative events are an opportunity for brands. If customers experience a problem, resolving it promptly and creatively creates positive and lasting memories. This is nicely illustrated in the figure below (Thomke, 2019).



Imagine travelling for business and wanting to get home and see your family. You missed your flight and it is unclear whose fault it is, or it is not clear or expected that your airline needs to solve the problem. But, with a smile, no questions asked, they book you on another flight and solve your problem: your disappointment is turned into delight. This is what is coined as the ‘peak-end rule’ in psychology, which states that people judge an experience largely based on how they felt at its peak (i.e. its most intense point) and at its end, rather than based on the total sum or average of every moment of the experience.

## Research Implications and Applications

Today's technology allows people to share their feedback on the go, whilst experiencing certain brand events or when being in certain touch-points. This can be done through geo technology, where we send consumers triggers to share their feedback when in certain locations or by sending people on missions (e.g. going to the supermarket and sharing their observations). By means of our proprietary community platform, we can tap into those experiences real-time through consumer missions, video upload, chat and more.

*“At SkyTeam, our position is to help member airlines offer customers a more seamless travel experience. With the SkyPriority Panel project, we can offer our member airlines crucial real-time feedback, allowing them to improve the customer experience.”*

**Mauro Oretti**, Vice President Sales & Marketing

*To become truly customer-centric and fuel consumer-led business thinking, the research program onboarded a network of high-value customers that could provide real-time feedback during their journey through a mobile application. Using geofencing technology, feedback is prompted at relevant occasions (e.g. when a passenger enters an airport), allowing travelers to review each journey touchpoint when relevant for them. Next to their completing short surveys, the broader narrative of their experience is captured through pictures and bottom-up comments, ensuring feedback is always in-context.*

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## CASE

### How SkyTeam is aiming high in customer experience

*As an association of nineteen airlines, SkyTeam's mission is to create a seamless travel experience through operational excellence, by putting the customer at the center, in particular for their SkyPriority offering, where they aim to give high-value customers a consistent premium experience. However, covering over 1,000 airports, SkyTeam faces the daunting task of creating and implementing such services across a group of disparate members, all with unique characteristics, cultures, languages and geographies.*

*SkyTeam sought to bridge the divide between themselves, their members and the end customer. To guarantee a consistent superior customer experience, they wanted to hear from SkyPriority customers throughout all journey touchpoints.*



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# THE EXPERIENCE RELIGION

#1  
MEMORIES OVER  
MERCHANDISE

#2  
INTERACT,  
DON'T ACT

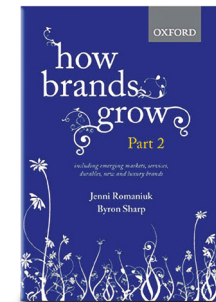
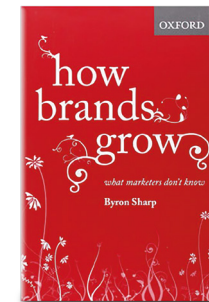
#3  
CREATE LASTING  
IMPRESSIONS





# THE PENETRATION RELIGION

The 'Penetration Religion' is a recent school of thought that has turned the (marketing) tables in many marketing departments and organizations. This thought-provoking thinking is primarily the result of the work of Byron Sharp at the Ehrenberg-Bass Institute for Marketing Science, and is gaining popularity amongst many brands and marketers. Sharp's book *'How Brands Grow: What Marketers Don't Know'*, published in 2011, challenges the classic marketing rules and thinking, and introduces new marketing laws based on the analysis of behavioral and purchase data.



With the first book being criticized for introducing examples which were focusing dominantly on the Fast-Moving Consumer Goods (FMCG) or Consumers Packaged Goods (CPG) sector, a sequel was released in 2015, showcasing how these new marketing laws can also be applied to other contexts (e.g. emerging markets, services, durables, luxury brands...). The thinking behind the 'Penetration Religion' has been the subject of many publications by Romaniuk, Stern, Riebe and others.



The 'Penetration Religion' can be summarized in the following three beliefs

**#1**  
GROW, GROW,  
GROW YOUR BASE

**#2**  
MARKET YOUR  
TARGET, DON'T TARGET  
YOUR MARKET

**#3**  
BE AVAILABLE  
EVERYWHERE, FOR  
EVERYONE

# #1

## GROW, GROW, GROW YOUR BASE

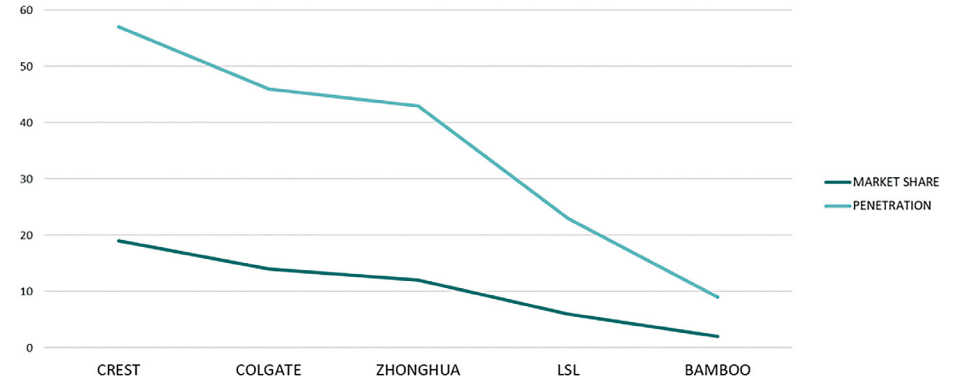
Market share growth is the holy grail in branding, marketing and business. Yet it is a daunting task, with many marketers and brand executives continuously analyzing cause and effect of their efforts, in search for the true success drivers.

Traditional marketing thinking (as also defined by the 'Classic Religion') states that growth can be the result of two factors, namely (1) more people buying the product (= increase in number of buyers or penetration) and (2) the current customers buying more frequently (= increase in buying frequency). Considering the above principle, two brands could be of equal size, where one has many buyers that buy the brand occasionally and the other has half the number of buyers, yet these buy twice as often (see table below).

	Annual market penetration (%)	Number of purchases per buyer per year	Resulting market share (%)
Brand A	32%	3	14%
Brand B	16%	6	14%

While this might be a sound scenario in theory, the 'Penetration Religion' highlights that, in reality, two brands with an equal market share by definition have similar levels of market penetration, since the latter is the core driver for growth. The analysis of market-share shifts over

time shows that brands primarily grow by increasing their penetration (Anschuetz, 2002). Yet this dynamic is also visible in the short term. Research by the Ehrenberg-Bass Institute, analyzing 157 brands for one year, has confirmed that both rising and declining brands display more change in penetration than in purchase frequency (McDonalds & Ehrenberg, 2003). When comparing brands within a category, one can see that there is a lot of variability in penetration metrics, while the average purchase frequency does not differ that much. This means that, according to the 'Penetration Religion', sales growth mainly comes from a growth in customer base, and that penetration is the primary growth metric.



BRANDS OF TOOTHPASTE	MARKET SHARE	PENETRATION	AVERAGE PURCHASE FREQUENCY
CREST	19	57	2.8
COLGATE	14	46	2.5
ZHONGHUA	12	43	2.4
LSL	6	23	2.2
BAMBOO	2	9	2.0
<b>AVERAGE</b>			<b>2.4</b>

Consider the above table with the example of toothpaste brands in China. Crest is the market leader with a 19% market share, while Bamboo is the smaller player with a 2% market share. One can observe how the penetration numbers (i.e. 57% for Crest and 9% for Bamboo), indicating how many people bought the brand at least once in a particular time frame, follow the market share. The two metrics are almost linearly correlated (see next figure), with a correlation score of 99%. In other words, bigger brands have more people buying them, and this in proportion to their market share.

The average purchase frequency across brands in the example, however, is 2.4 a year, meaning that, on average, people buy toothpaste twice or three times a year. This toothpaste buying frequency does not vary a lot across brands, big or small, yet we see a slightly higher purchase frequency for the market leader Crest (2.8) and a below-average purchase frequency for Bamboo (2.0). While purchase frequency does not vary dramatically between small and larger brands, it does follow penetration and market share, not the other way around. The toothpaste example illustrates how bigger brands not only have a higher penetration, they also get bought slightly more often. This pattern is known as 'double jeopardy', an empirical law in marketing where, with very few exceptions (e.g. store brands), lower-market-share brands have fewer buyers in a given period that also purchase the brand less frequently. So smaller brands get hit twice: their sales are lower because they have fewer buyers, and these buyers also tend to buy (slightly) less frequently. This double-jeopardy principle is valid across a wide range of sectors, categories, and in every country it has been tested in (Romaniuk & Sharp, 2016).

So, how does a brand sustain or even grow its customer base? Marketing background or not, chances are one is familiar with the marketing proverb “it costs much less to retain a current customer than to acquire a new one”. This notion has been at the basis of many customer-retention programs and loyalty initiatives, and of extreme investments in customer excellence initiatives (see the ‘Experience Religion’). Yet Sharp highlights that empirical evidence points in a different direction, and that this thinking is based on a thought experiment rather than on real-life data (Sharp B., 2011). In reality, reducing defection rates is a very difficult and expensive task, as they also follow the double-jeopardy law: those of directly competing brands do not vary significantly (as we also saw with purchase frequency).

All brands lose customers, and the number of customers one loses depends on the number of customers one has. Bigger brands will lose more customers, yet these represent a smaller portion of the total customer base. The common metaphor is that of the ‘leaking bucket’, where one could compare a brand’s customer base to a perforated bucket. The bucket leaks, continuously losing content. Therefore, brands must make ongoing efforts to keep (re)filling the bucket.

Empirical evidence delivered by Sharp shows that, market after market, the potential gains from acquisition outperform the potential gains from reducing defection rates. Research has shown that growth (i.e. increased market share through increased penetration) is almost entirely due to acquisition (Riebe, 2003). Similarly, the defection rates of declining brands match those of stable brands, yet their acquisition rates are poor. In any category, two 10%-share brands will have similar penetration rates as well as very similar repeat-purchase metrics. This clearly shows that customer-base growth is mostly due to excelling in acquisition (Sharp B., 2011).

Gaining market share by halving the defection rate would be nearly impossible. Simply getting existing customers to buy more often and to buy with 100% loyalty is unrealistic: no one buys a product more than required, and no brand can command 100% loyalty. This might sound a bit controversial, yet the loyalty rates of even the most iconic brands are often far lower than one would assume. Consider Apple, for example; the repurchase rate of Apple lies at 55%, meaning that 1 in 2 would switch to another brand when considering a product renewal. For Harley Davidson it lies at 33%, while for the average FMCG/CPG brand this is 14% (Sharp B., 2011). We are far less loyal than we think (or than we expect consumers to be).

According to the ‘Penetration Religion’, loyalty in its purest form is a myth. This does not mean that loyalty does not exist - it sure does, yet rarely in its pure form. Customers are at best ‘promiscuously loyal’, and switch between alternative rival brands based on availability. Consider the example of Coca-Cola and Pepsi; in the UK, 72% of Coke drinkers also buy Pepsi (Sharp B., 2011). Buying is not random; customers have a clear behavioral preference and restrict their purchases to a personal repertoire of brands.

All brands enjoy a certain loyalty, yet bigger brands do so at a slightly higher rate (yet this does not vary dramatically across competing brands). Loyalty is another double-jeopardy metric: bigger brands have more customers, and these are also somewhat more loyal. This can be explained by the fact that larger brands have proportionally more light buyers in their base (that are more loyal by nature: for once-a-year soft drink buyers, chances are it will be Coca-Cola). Therefore, larger brands have more 100%-loyal buyers, as they have more customers that did not purchase any other same-category brand during the analysis period.

## #2

# MARKET YOUR TARGET, DON'T TARGET YOUR MARKET

This brand religion stipulates that brand growth comes from growing one's customer base, through an acquisition rather than a retention strategy. So how does one approach this acquisition strategy?

While the 'Classic Religion' emphasizes the benefits of segmentation and target marketing (i.e. a marketing strategy where brands do not try to sell to all buyers of a category but rather focus on a partition of the market, or a segment of people), the 'Penetration Religion' is all about the power of undifferentiated mass marketing. According to Kotler and the other 'Classic Religion' contributors, brands need to segment a market and focus efforts on (heavier) buyers that have a greater interest (Kotler P., Armstrong, Brown & Adam, 1998). Yet Byron Sharp argues that buyers of a category are not that different, and that a uniform mass marketing strategy is the most effective approach for acquisition.

This market homogeneity is highlighted in research by Hammond, Ehrenbergh and Goodhardt (1996), showing that brand-user bases seldom vary despite the efforts to segment and differentiate (Hammond, Ehrenberg & Goodhardt, 1996). Many marketers have targeted special audiences (following a target market strategy), yet without any real results. An example is the UK brand Yorkie Chocolate with its famous former tag line: "It's not for girls". Since its inception, the large-chunks brand has been marketed to blue-collar male workers promising them

extra energy. The packaging was a serious attempt to target men. Yet these efforts did not lead to any extreme gender distribution differences in buyers, 44% of their buyers being female.

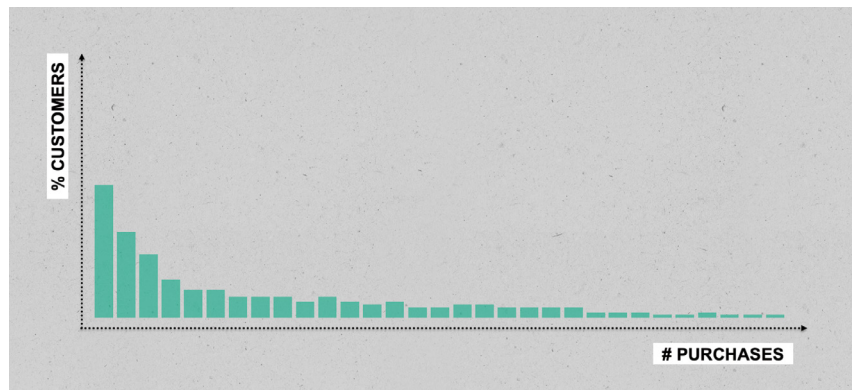


According to the 'Penetration Religion', segmentation is not only useless, it can even be dangerous: brands might focus on the wrong segment. Consider the example of Smart cars, designed as a modern, funky city car to appeal to young urban Millennials. Yet it turned out the core buyers had passed the Millennial expiration date for quite some time already, with baby boomers being the key Smart buyer group. Not only could baby boomers afford the premium pricing that was withholding Millennials from buying one, it also provided them with a decent, safe, small and easy-to-maneuver vehicle.

So, instead of focusing on a select few, this school of thought promotes marketing to the whole population of potential buyers. A brand that also understood this, is Goya Foods, a food manufacturer specializing

in Hispanic food. At its start, the brand focused on servicing Latinos in the US. Yet a few years back, the brand's CEO Bob Unanue had the simple but powerful idea to market the key products to non-Hispanics as well, by also marketing in English, thereby targeting both second-generation Latinos and a broader non-Spanish-speaking audience. Unanue's reasoning was simple: "We like to say we don't market to Latinos, we market as Latinos". This resulted in a revenue growth from 1 to 1.3 billion dollars in two years.

The 'Penetration Religion' highlights the importance of also focusing on light buyers, a group that is often overlooked or ignored in (classic) target-marketing strategies. Byron Sharp points out that brands typically follow a skewed, J-shaped distribution curve, where heavy buyers are the minority and the big bulk of customers are light buyers. In order to maintain sales and grow, marketers must reach these masses rather than to focus on the select few.



This theory throws overboard the famous Pareto law, which states that 80% of a brand's sales come from 20% of its customers. Sharp and Romaniuk documented a Pareto law closer to a 20:50 pattern, meaning that the top 20% of the customers contribute to 20-40% of the sales (Sharp & Romaniuk, 2007). Growth, according to the 'Penetration

Religion', should therefore come from a proportional increase in all kinds of buyers (light, medium and heavy), with a special focus on light buyers. As controversial as it might seem, if brands do want to target, they should target light buyers, as it is the most lucrative strategy. The reasoning is that it is nearly impossible to target light buyers without also reaching heavy buyers: in targeting light buyers, brands ipso facto reach their heaviest buyers as well. Heavy buyers see everything a brand does: they see the packaging, are often Facebook fans and spot communication easily. Light buyers and potentials do not, so brands need to keep reminding them and drawing their attention.

For the 'Penetration Religion', target marketing is dead. A core principle that turns the premise of the 'Classic Religion' upside down: do not market the target, target the market. Forget segments; undifferentiated mass marketing generates the greatest penetration.

### #3

## BE AVAILABLE EVERWHERE, FOR EVERYONE

The 'Penetration Religion' does not consider consumers as strictly loyal (i.e. that would go out of their way to buy a brand). They are at most 'behavioral loyal', where they will buy a brand according to availability, both mentally, where it is top of mind in a buying situation (i.e. mental availability) and physically, where is available and easy to buy in a buying situation (i.e. physical availability).



MENTAL

&

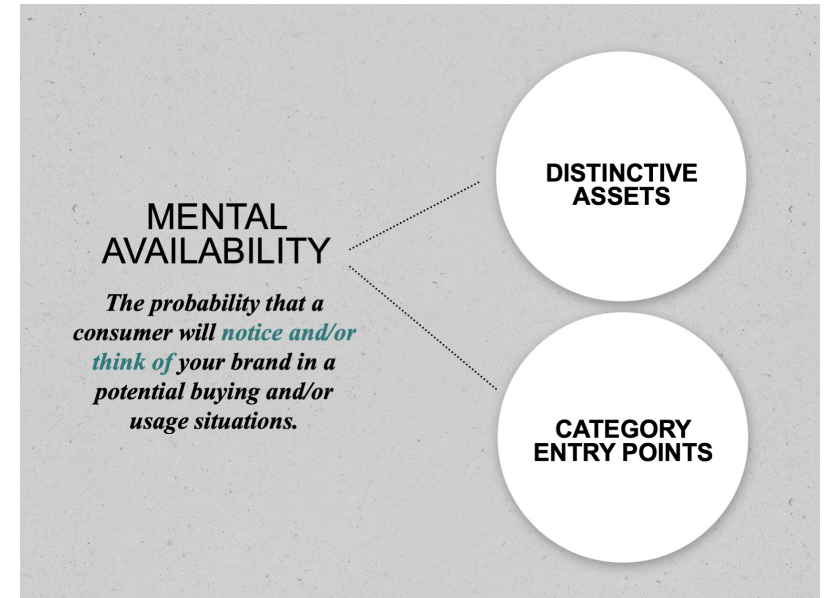


PHYSICAL

### MENTAL AVAILABILITY

Mental availability refers to the probability of a consumer easily noticing, recognizing and thinking of a specific brand in a given purchase situation. It is the accessibility from memory across a range of situations and needs that buyers encounter. Mental availability is about creating memory structures that help people make easy and fast decisions. According to the Bass-Ehrenberg Institute, it takes a consumer only 13 seconds to select a brand in-store. Consumers 'think fast' and spend little time thinking about a purchase decision. They make decisions without really being aware of the why, and with little significant mental effort. Our brains default to function automatically and highly subconsciously, and rely on the depth of memory structures created by brand advertising, packaging etc. Decisions are made easily and rapidly. A brand's marketing efforts should be centered around building mental availability, by creating and strengthening the mental shortcuts linked to a brand.

Mental availability consists of 2 components: (1) consideration in Category Entry Points and (2) possessing Distinctive Brand Assets.



### Category Entry Points

Category Entry Points (CEP) are situations, contexts, reasons or occasions in which or for which consumers consider buying a certain product or service. People use CEPs as cues that trigger options to buy. They are pathways to a brand in the consumer's mind, and serve as channels that build mental availability. In other words, brands need to identify the most common and most important entry points for their product category and make sure people think of them in as many entry points as possible. How many CEPs a brand should (attempt to) dominate depends on how big a brand is, can be or wants to be. Either way, large-market-share brands are linked to a broader range or number of CEPs (which they 'own' in the consumers' minds) than smaller brands, and there are no large brands that own small or niche CEPs.

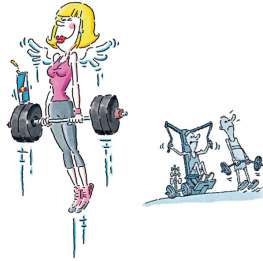
**FROM A TO B  
WITHOUT ANY  
ZZZ'S.**



RED BULL GIVES YOU WINGS.



**HOW DO YOU  
TAKE YOUR ROUTINE  
TO THE NEXT LEVEL?**



RED BULL GIVES YOU WINGS.

**MAKING TEAMWORK, WORK.**



**GOING BACK  
AND FORTH, FIFTH  
AND SIXTH?**



**'T WAS THE SPRINT  
BEFORE CHRISTMAS.**

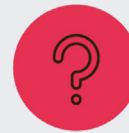


A brand that does well at building and strengthening CEP awareness and consideration in its communication is Red Bull. The famous 'gives you wings' slogan has been smartly integrated and used in a variety of illustrated context occasions, ranging from car driving to workouts to long days at work. For years, Mastercard used a CEP layer in its advertisement efforts, linking their slogan 'for everything else there is Mastercard' to a broad range of use cases. These efforts link the brand to various context occasions, making it top of mind across a multitude of occasions.

## Research Implications and Applications

That is why it is important to capture a brand's relevant CEPs. A first step is to map all possible CEPs, irrespective of their importance, frequency and relevance, by identifying the following five Ws for consumers:

- Why: Why do people buy or consume a particular brand?
- With what: With what do people buy or consume a particular brand?
- Where: Where do people buy or consume a particular brand?
- When: When do people buy or consume a particular brand?
- With whom: With whom do people buy or consume a particular brand?



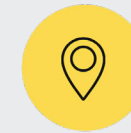
**WHY**

*"To satisfy my hunger"*



**WITH WHAT**

*"With Boardgames"*



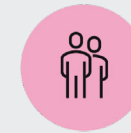
**WHERE**

*"On the road"*



**WHEN**

*"At breakfast time"*



**WITH WHOM**

*"With the kids"*

A next step is to identify the core CEPs for the brand, which is possible by calculating how often a CEP is linked to the brand. This results in a few interesting metrics, assessing the strength of the brand's memory structures:

- Mental market share = the particular brand's percentage of CEP associations of the total CEP associations for the brand and its competitors
- Mental penetration = the percentage of category buyers that link the brand in question with at least one CEP
- Network size = how many CEPs the brand is linked to in the mind of those aware



## CASE

### Using Creative Crowdsourcing to fuel brand extensions in new CEPs

*Seriously, the Scottish cheese brand known for its characterful cheddar, wanted to explore new territories in an increasingly commoditized category. Embarking on this innovation journey, the brand involved the creative eureka network, which inspired the launch of two new products in the UK. Seriously wanted to explore the solution space linked to two emerging category entry points, i.e. office snacking with colleagues and evening snacking. Creative consumers were asked to pitch their ideas on new cheese concepts linked to these alternative category entry points. This resulted in 94 ideas in just 3 weeks, from participants in 26 countries. These ideas were then grouped in themes and mapped on innovation trends in the UK. The winning idea 'Cheddaretta' came from a Peruvian Creator who found inspiration in the Argentine grilled dish Provoleta. This idea inspired the 2018 launch of Seriously Melting Pot.*



The visuals are real examples of raw eureka

## Distinctive Brand Assets

While the classic branding theories emphasize the importance of differentiation and of building a meaningful difference in the consumer's mind that leads to purchase, this religion acknowledges that having similar products or features is the norm. Brands compete with other brands which are selling similar products to similar consumer audiences. Supporters of the 'Penetration Religion' state that differentiation is not sustainable in the current business reality. In this open marketplace, product features are copied (and even outpaced) faster than ever.

What brands should worry about, is whether or not their brand is 'distinctive'. Distinctiveness refers to a brand's identity and to how it is recognized. It is not why people buy a brand (which is the traditional thinking behind differentiation), but rather how people know which brand it is. Brands should therefore look, feel, smell and sound different, even if they do not compete as differentiating brands or are not different from a functional perspective. This is where distinctive assets come into play. Distinctive assets are a set of cues owned by a brand (e.g. all visual, aural and verbal cues) that trigger the brand into one's memory when being seen, smelled or heard. Distinctive brand assets are brand identity elements (e.g. colors, slogans, logos) that signal the brand name to consumers and hence serve as memory shortcuts, allowing consumers to make buying decisions rapidly and easily. The focus should be on assets that are highly and uniquely associated with their brand - i.e. distinct. These assets allow a brand's communication to work effectively. Brands should use these assets in communication and packaging consistently in order to build memory structures in the consumers' minds over time.

Logos are important brand assets, but the same goes for font types, color schemes or even jingles. Just think of how iconic the Nike swoosh is, or the Apple logo, or even the shape of a chunk of Toblerone. Changes to brand-distinctive assets should be minimal and considered; if not, there is a danger of losing the mental equity. Semiotics may be adopted as part of the brand asset management process. Semiotics is the science of studying signs and symbols in a given culture that interact with the signs and symbols embedded in a brand, its communication, packaging or product, which shape consumer understanding. Before changes are made to any brand asset, a semiotic review of the design can help understand whether the intended meaning matches how consumers interpret the new brand design.

This is something Tropicana underestimated when launching their new packaging design for Tropicana Pure Premium in 2009. The brand invested 35 million dollars in an advertising campaign to promote this new packaging. Yet consumers criticized the new design, which did not reflect any of the familiar Tropicana assets. The overhaul of the packaging was drastic (see image), with many distinctive assets removed or adapted (e.g. the orange punched by a straw, the brand name and its font...). The semiotics of the packaging had been changed fundamentally. The old packaging communicated fresh and natural orange juice, picturing orange and straw. The new packaging design appeared premium, exclusive and artificial by focusing on the orange juice in a tall glass, instead of centering on the natural fruit, which made the brand unrecognizable. This disconnection was also visible at a sales level, with a 20% drop in just two months after the launch. A month after the rebranding, Tropicana announced it would return to its original packaging design, and within a few months, the old packaging was back on the supermarket shelves.

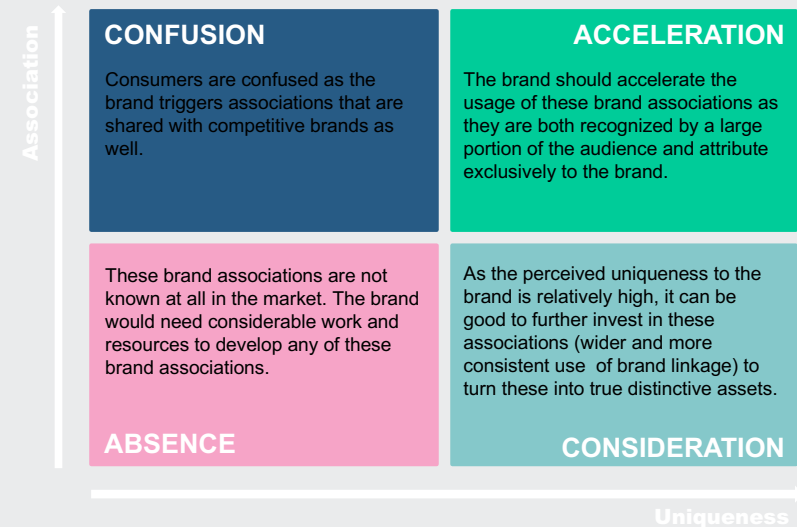


## Research Implications and Applications

It is clear that brands need to understand and capture their portfolio of distinctive assets, as these are what they need to reinforce and highlight in everything they do (from packaging to communication). This starts with mapping all potential assets that can be linked to a brand, ranging from product shapes to color schemes, font types, slogans, jingles, packaging attributes and many more. A technique to gather them is to ask consumers to draw a picture of a brand and to analyze which particular assets consumers focus on and to which extent they are drawn correctly. Another technique is to ask consumers how they would describe the product if they were at a supermarket and had to ask a five-year-old to get the product from the shelf. Both techniques give an understanding of the most prominent distinctive assets of a brand.

A next step is to identify the strength and distinctive potential of these asset, something we do using our proprietary 'Go/No Go' tool. The InSites Consulting 'Go/No Go' tool was developed based on extensive readings of the scientific literature study on implicit constructs and implicit measurement (Nosek & Banaji, 2001). The tool and method were further refined through a series of R&D studies and with the support of Professor Dr. Jan De Houwer at the department of Experimental and Clinical Psychology of Ghent University (Belgium), an internationally recognized expert in implicit measures and cognitive psychology. The tool, a variant of the GNAT ('Go/No Go' Association Task), works as an association exercise; an asset is introduced at the start of the task, after which participants are shown a set of brand names, the one after the other, for a very limited time, and are then to press the space bar if they feel the brand can be linked to the shown asset. When measuring a brand's distinctive assets, associations towards the target brand and one or more competitor brands are measured. This results in two primary output measures:

- **FAME/ ASSOCIATION:** the percentage of responses or the association level for each item. This score gives an indication of the association level for each brand with an asset.
- **UNIQUENESS:** the extent to which people attribute an asset to the right brand and not to any other brand.



## CASE

### How BEAR shaped its distinctive assets for further growth

*BEAR, the fruit- and vegetable-based snack alternatives company with its recognizable colorful packaging featuring a bear, never formally identified their packaging and communication assets. Yet due to their expansion to other markets outside the UK, the brand understood the need to set global brand guidelines as well as to provide clarity as to which aspects individual markets can have more freedom. To gain insights into which assets were core to the brand and as such key to protect and retain cross-markets, the BEAR asset portfolio was tested on its distinctiveness. Using the InSites Consulting Implicit Measurement approach, a wide range of BEAR assets were tested vs. other competitor assets in BEAR's existing market as well as in a new market. This allowed to inform the team about which assets to put forward and which ones to re-think in their new endeavor.*

## CASE

### Identifying distinctive assets for Jacobs Douwe Egbert (JDE)

JDE wanted to get a better understanding of the distinctiveness level of its brand assets. Using an online study in over 15 countries around the globe, we identified the extent to which brand attributes (logos, colors, tag lines and sound bites) were associated strongly and uniquely to the key brands in their portfolio. Next to testing the current assets, the approach also incorporated some assets from the past. Apart from giving insights into what the most distinctive brands and assets are, this approach also brought to light the strength of some former assets which are no longer applied actively, such as the old Douwe Egebarts 'Aroma Lady' logo and the Jacobs 'crown'. These results were used in a new communication and packaging design strategy, where for the Douwe Egebarts brand, the 'Aroma Lady' received a far more central position on the pack in terms of design, color and size. The new Jacobs design emphasizes the key assets of the Jacobs brand, being the crown, cup and aroma.

***“Applying the learnings of this survey to new pack designs lead to a significant increase in shelf performance (improved brand salience and SKU findability) of our brands.”***

**Pascal Mignolet**, Head of Market Research at Jacobs Douwe Egebarts

Even if a brand's advertisement and packaging is noticed, the 'Penetration Religion' states it cannot work unless it refreshes or creates useful memory structures for the brand. All advertisement and packaging elements should reinforce or build memory structures. One could say that this is the brand equivalent of Pavlovian conditioning, where one wants consumers to unconditionally associate assets with a brand.

### PHYSICAL AVAILABILITY

Mental availability efforts are worthless if a brand is not present where and when people shop. If a brand is mentally available but not physically, it will be substituted by one that is. Physical availability boils down to being as easy as possible to buy, for as many consumers as possible, across as many physical buying situations as possible. This includes not just retail penetration, but also hours of availability, ease of purchase... Therefore it is important that physical availability overlaps with mental availability, and that a brand is available at all the relevant CEPs (see supra: Mental Availability).



## Research Implications and Applications

Understanding and measuring a brand's physical availability boils down to two dimensions:

- Presence: is the brand available where it should be?
- Relevance: is the brand (easily) buyable?

This can be done by asking consumers to go on a 'shopping' mission. Consumers can act as mystery shoppers and visit different stores (documented with pictures or videos) to report not only on a brand's presence but also on how easy it was to locate the brand/product and buy it. In-context triggering helps understand not only the what, but also the how.

A brand that succeeded in gaining massive physical availability is Coca-Cola. Remember the old slogan, 'Always Coca-Cola'. Robert Woodruff, Coca-Cola's leading figure from 1923 until his death in 1985, promised to put Coke's products "within arm's reach of desire", and successfully so. Wherever you are in the world, there is Coca-Cola. This is also what an NGO noticed in Tanzania, where they struggled to get medicines to remote villages. To their surprise, they noticed that Coca-Cola was available even in the most remote areas, which they had trouble reaching. As a result, they partnered with a Coca-Cola distributor, using their infrastructure and network to provide these remote areas with medicines.

Another example comes from Target, a large retailer in the US. Feeling the pressure from (online) retailers Walmart and Amazon, Target felt the need to level up its 'ease of purchase' strategy in 2018. The retailer not only added a 24/7 client service, online ordering and home deliveries to their service, they also opened smaller-format stores on college campuses and in cities like New York to help drive traffic. They then invested in a same-day delivery platform to 1,100 stores and an in-store pick-up service where 95% of online orders are processed within the hour. This change in strategy, with a focus on physical availability, turned into a great success, bringing the retailer its best sales quarter in 13 years (Forbes, 2019).



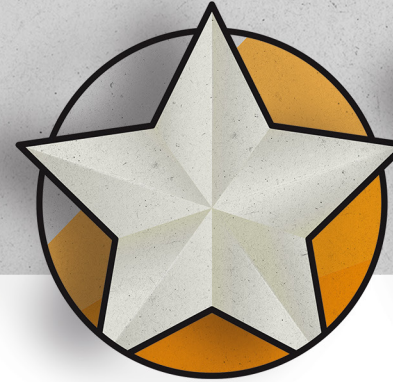
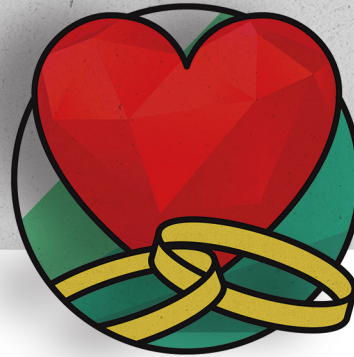


# THE PENETRATION RELIGION

#1  
GROW, GROW,  
GROW YOUR BASE

#2  
MARKET YOUR  
TARGET, DON'T TARGET  
YOUR MARKET

#3  
BE AVAILABLE  
EVERWHERE, FOR  
EVERYONE



## CLASSIC RELIGION

## INFLUENCER RELIGION

## RELATIONSHIP RELIGION

## EXPERIENCE RELIGION

## PENETRATION RELIGION

DIFFERENTIATION IS KEY THROUGH STP

CONVERSATIONS CUTS THROUGH THE CLUTTER

EMOTIONS GUIDE ACTIONS

MEMORIES OVER MERCHANDISE

GROW, GROW, GROW YOUR BASE

ONE-WAY IS THE ONLY WAY

MARKET THROUGH PEOPLE, NOT TO PEOPLE

CREATE AN IDENTIFIABLE IDENTITY

INTERACT, DON'T ACT

MARKET YOUR TARGET, DON'T TARGET YOUR MARKET

ALL EFFORTS LEAD TO BRAND EQUITY

NO CONTENT WITHOUT PURPOSE

BUILD LONG-LASTING LOVE

CREATE LASTING IMPRESSIONS

BE AVAILABLE EVERYWHERE, FOR EVERYONE

# AN INTERMISSION ON BRAND IDENTITY

There is something all brand religions have in common: they all need a brand identity. A 'brand identity' provides a sense of community or a feeling of belonging for all brand stakeholders. Just like actual religions, where communities center around mosque, temple, synagogue or church, brand identity helps provide cohesion, follow rituals and pass down traditions.

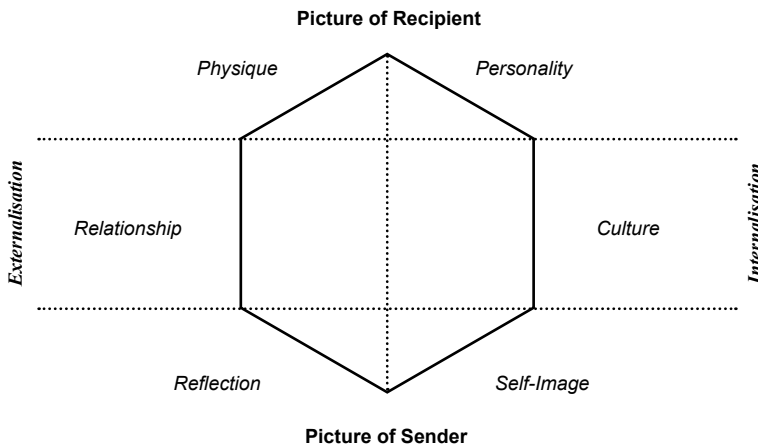
For a brand to be strong and grow, it needs a clear and valuable identity. Brand identity is the starting point for the creation of brand value (Aaker J., 1997). A brand identity is what a company 'wants' its brand to mean in the market: the 'should be' situation and the desired core brand affiliations and associations. It is what a company decides its brand ought to stand for, from color and visual identity over values to features and benefits, all the way up to performance, quality and front-line staff responses. Developing a 'brand identity' is key as it ultimately helps 'position' a brand in the market and achieve a brand image in people's mind or build a structure in their memory. While interrelated, 'brand identity' and 'brand positioning' (or 'brand image') are not the same. Brand identity is independent of any religion adhered to. The brand strategy guidelines (or brand religion mix) rather define which attributes to stress and communicate in the market and/or to specific target audiences.



A series of models can help develop brand identity. We will briefly describe two well-known ones: (1) the brand identity prism and (2) the identity planning/brand vision model.

### 1. BRAND IDENTITY PRISM

The first model we wish to highlight is Jean-Noël Kapferer's Brand Identity Prism. This framework describes three external and three internal factors that should be considered when defining brand identity (Kapferer, 1996).



The external factors are described first. 'Physique' refers to the underlying physical characteristics of a brand. It refers to the salient physical qualities which are seen by the target audience (e.g. color or shape of the logo and the packaging). It may also include product features, symbols or attributes. The physique of a brand turns abstract and elusive characteristics into something visible and visual. For example,

when one sees the Apple iPhone one is attracted by its elegance, style and aesthetics, and immediately recognize the Apple brand without seeing the logo. This dimension is very important in the 'Classic Religion' as well as in the 'Penetration Religion'. 'Relationship' refers to the (strength of the) relationship between a brand and its customers in terms of what the latter think and feel, and how they pursue the brand. Human traits are often used to describe this relationship. The 'Relationship Religion' prioritizes and expands this aspect. Finally, 'Reflection' focuses on how a customer reflects with a particular brand. This means: how are customers that are using the brand perceived by the outside world? This dimension is relevant specifically in the 'Influencer Religion'.

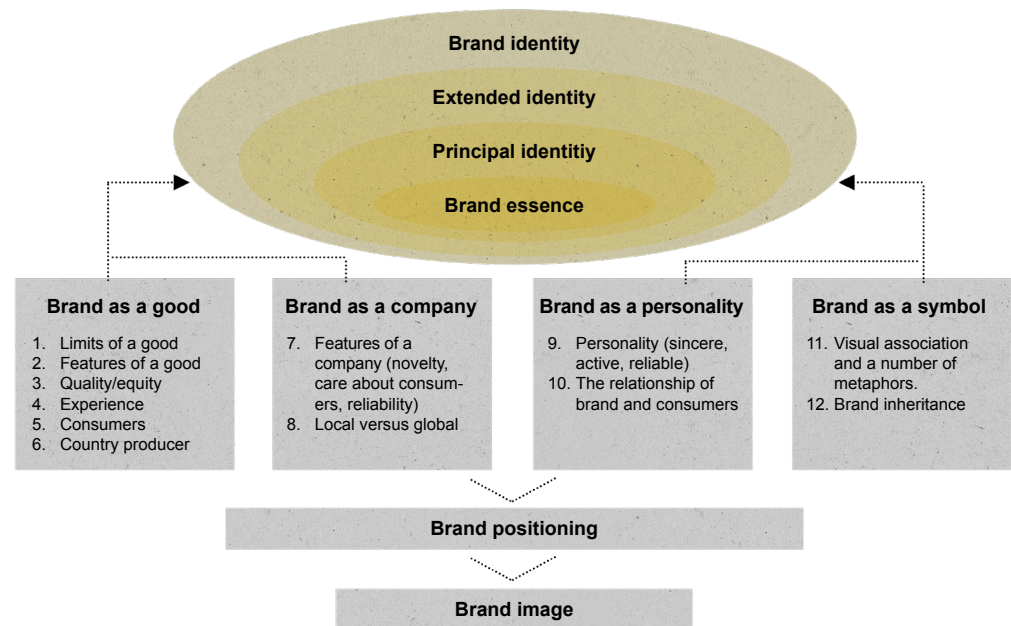
Next to external factors, the Brand Identity Prism also describes three internal factors. 'Personality' refers to how and what the brand would be if personified. It focuses on traits, and includes character and attitude. A brand personality is developed by attributing human characteristics to the brand. This allows consumers to relate to the brand easily. To facilitate this process, some brands hire celebrities to endorse the product's personality. 'Culture' refers to the inherent DNA of the organization behind the brand. It consists of the values, expressions and interactions the organization creates with its customers, its employees, and all stakeholders at every point. Finally, 'Self-image' refers to how customers perceive themselves when using the brand.

## 2. STRATEGIC BRAND IDENTITY PLANNING OR BRAND VISION MODEL

David Aaker is the creator of the 'Strategic Brand Identity Planning/ Brand Vision Model' (Aaker J., 1997), in which he highlights that the brand identity concept is holistic and entails much more than the shaping of a 'visual identity'. The aim of the Aaker model is to build a brand identity in terms of what the brand wants to stand for in the eyes of consumers in an all-compassing way. To reach this objective, Aaker advises to consider a brand starting from four perspectives: 1) as a product or good, 2) as a company, 3) as a personality, and 4) as a symbol (see figure below). The model is intended as a 'pick and choose' model, where dimensions are selected given the context at hand. To make the model manageable, the insights resulting from the multi-perspective approach should be captured in a brand-identity formulation that consists of two or three components: the principal or core identity, the extended identity, and possibly also the brand essence.

The 'principal identity' contains the associations that are most likely to remain constant over time, that are the most compelling and differentiating, and that truly drive the brand-building initiatives. There are typically two to five principal identity elements (Aaker D., 2014).

The 'extended identity' consists of the elements that provide texture and completeness. It is intended to provide rich and complex details, which makes it harder for competitors to copy a brand. Aaker indicates that "...it also allows brand strategists to make better judgments as to whether a program is 'on brand'". In this identity layer, a multitude of elements is typically included (more than five). For example, detailed brand personality elements may be part of the extended identity. Also



elements described by Aaker as "...crucial for success but (that) may not be a basis for differentiation" are included in the extended identity (e.g. high quality). They are included at the extended identity layer as they can and should influence branding programs but not in the principal identity layer, because they are not a centerpiece of the brand - although they may evolve into a core element over time.

The 'brand essence' is a final, optional layer. It is the representation of a central theme or single thought that reflects the core of the brand vision (Aaker D., 2014). It is what the brand aspires to do, and can be used in internal communication, inspiration to employees and partners, and guiding programs. Examples are 'Ideas for Life' (Panasonic) and 'Family Magic' (Disneyland).

## To a strategy canvas with the Brand Key or Brand Box model

Brand identity is needed to ultimately achieve a brand positioning or image in the mind of consumers. The 'Brand Key' or 'Brand Box' model is a strategic and actionable exercise that extends the brand identity and helps decide which elements to communicate in order to achieve an adequate brand positioning. The 'Brand Key' model is a brand strategy canvas that completes nine elements which are relevant to consider when building a brand: root strengths, competitive environment, target, consumer insight, benefits, values/ beliefs/ personality, reasons to believe, discriminator/ distinctive assets and a brand essence/ brand positioning statement.

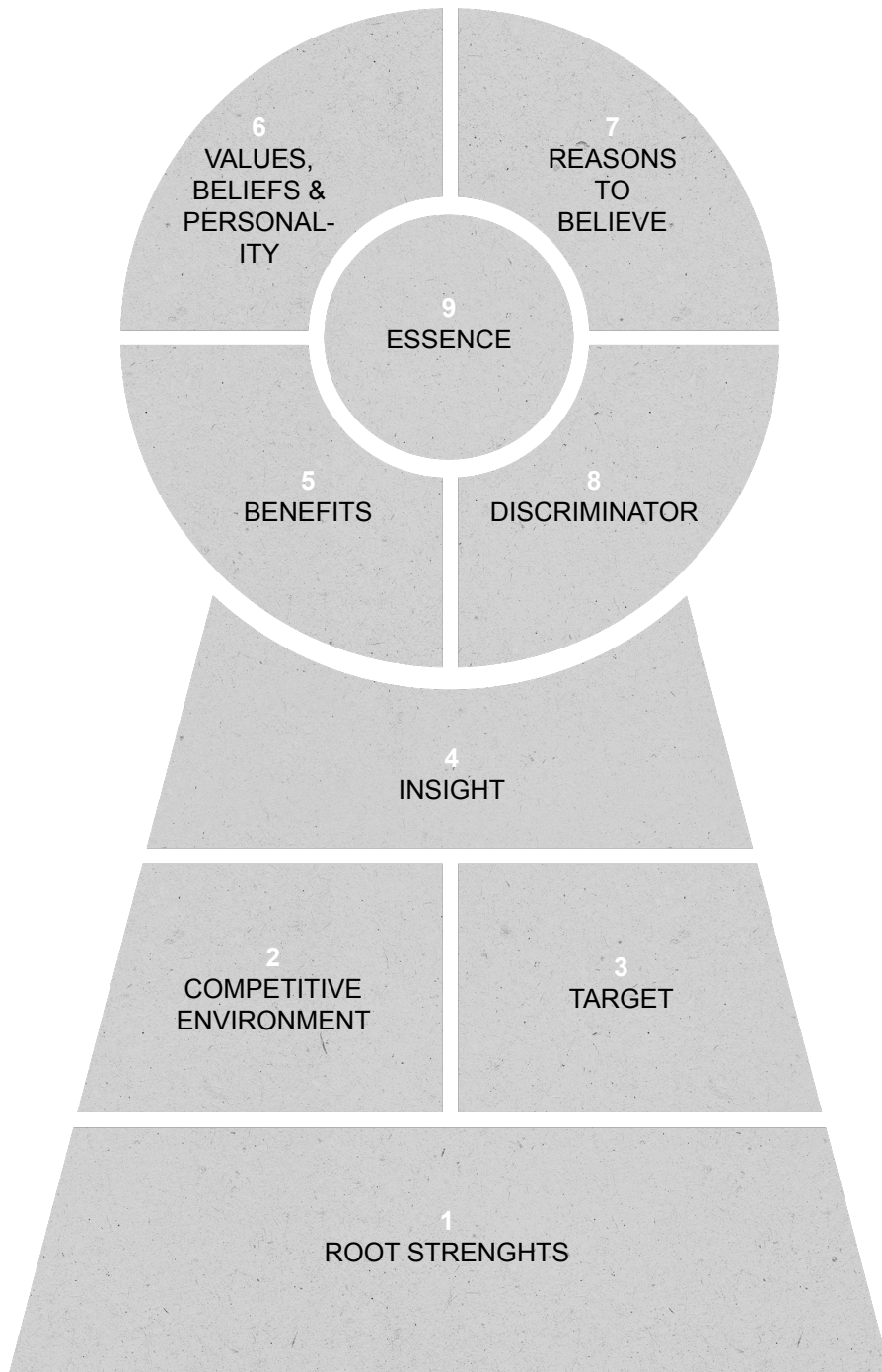
The 'Brand Key' model integrates multiple brand components. The true origin of the model is unclear, but it is mentioned in the book *'Positioning the Brand'* by Riezebos and Grinten (2012), and is sometimes attributed to Unilever's way of marketing.

The elements of the original 'Brand Key' model have been modified slightly (see figure next page):

1. Root strengths: what are the original values and benefits that made the brand what it is now, what was it built on and what is it known for?
2. Competitive environment and intensity: which choices do consumers consider and/or desire when a need occurs and a purchase decision is made? These can be obvious, direct choices as well as less obvious, indirect competitors (e.g. substitutes, new entrants, new technologies...).
3. Target: describes the brand's target group(s) in terms of demographics, attitudes, behaviors etc. In the 'Classic Religion' this could be well-defined segments, for the 'Influencer Religion' it

could be influential, while for the 'Penetration Religion' it could be the entire market (as long as they are not category rejectors).

4. Consumer Insight: what is (are) the (latent) need(s) or friction(s) the brand solves? A good insight is relevant to consumers, provides a fresh perspective but is at the same time present sub-consciously, and people should be excited that there is a brand appealing to it (InSites Consulting, 2018).
5. Benefits: functional and emotional benefits that consumers get when using the brand; help solve consumers' needs. Functional benefits are typically based on 'tangible' attributes and provide functional value. Emotional benefits are less tangible and provide positive feelings or rich experiences.
6. Values, beliefs & personality: what does the brand want to stand for and believe in, and/or its personality.
7. Reasons to believe: the proof points that the brand can deliver on its promised benefits and make the claims credible. What are the arguments that say the brand is the best option for them? "I buy this brand because..." is a typical question that is answered with reasons to believe.
8. Discriminator or distinctive assets: the single most compelling reason why consumers buy a brand. This can be generated by completing the phrase 'only brand X has ...'. In the 'Penetration Religion', there are no USPs or discriminators, rather distinctive assets. Distinctive assets are a set of cues owned by a brand (e.g. all visual, aural and verbal), which serve as memory shortcuts to allow consumers to make rapid and easy buying decisions.
9. Brand essence: the distillation of the brand's genetic code into one or two clear words.



This brand key strategy canvas should result in a 'brand positioning statement'. A good brand positioning statement should be brief, unique, relevant, important, believable, actionable and sustainable. The following table (adapted from Kotler's Brand Positioning Statement suggestions) can be used for writing a brand positioning statement.

Target audience <i>Who is your brand serving?</i>	For:
Category explanation <i>What is a simple description of the product?</i> <i>Where do you play?</i>	BRAND is:
Promise <i>How does your brand solve customer needs uniquely, through which benefits?</i>	That:
Evidence and reasons to believe <i>Why would people believe you will deliver these benefits?</i> <i>Why are you passionate about it? Where do you win?</i>	Because:
Payoff <i>What is the final emotional payoff for the customer?</i>	Such that:

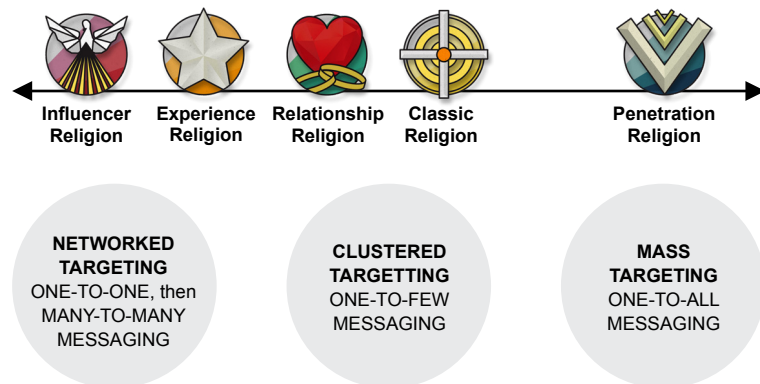


## CLOSING CHAPTER

At the end of the day, all brand religions serve the same purpose: growth through sales. One could say they are merely different routes to the same goal. Despite conflicting thoughts and beliefs, there are some parallels. This closing chapter provides an overview of the core differences and similarities between the five brand religions. This meta-perspective on how the different religions link to one another can help brands understand which religion to pursue, or which elements to combine in order to achieve brand success.

## 1. Communication targeting strategy

A first comparison involves the choice in communication targeting strategy. This ranges from 'networked targeting' using a one-to-one approach to trigger many-to-many brand conversations, over 'clustered targeting' in which one tailored message is sent to a select segment (one-to-few messaging), to 'mass targeting' in which a brand message is sent to as many recipients as possible (one-to-all messaging).

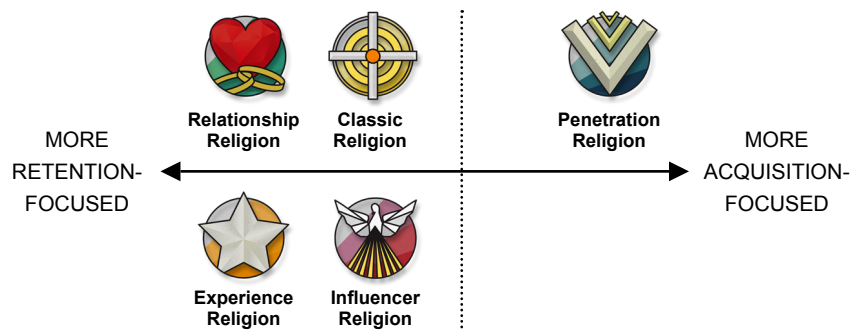


The *'Influencer Religion'* pursues a 'network targeting' strategy. The spokespersons of this religion often point to 'one-to-one' and 'many-to-many' brand communication approaches. The 'one-to-one' aspect refers to the practice that people with 'influential' potential are targeted (individually) to help spread brand conversations, while the 'many-to-many' approach is linked to the practice of fueling a brand community with relevant content that can be picked up and shared. The

*'Influencer Religion'* aims for a combination, where influential gatekeepers are approached to trigger many-to-many conversations. Although possibly orchestrated less explicitly, one could argue that a similar strategy is adopted by the *'Experience Religion'*. The *'Relationship Religion'* also embraces one-to-one messaging (to truly build an emotional connection, one must go one-to-one, yet one-to-few messaging is often the reality). A clustered communication targeting strategy using one-to-few messaging is typical for the *'Classic Religion'*, by using the STP (Segmentation-Targeting-Positioning) philosophy that is characteristic of this brand religion. The *'Penetration Religion'*, finally, clearly adopts a 'one-to-all' perspective: one big message is sent to as many potential customers as possible, in as many occasions and places as possible, and as many times as possible.

## 2. Customer growth strategy

A second (dis)similarity is the choice of customer growth strategy: the extent brands grow through customer acquisition and/or customer retention initiatives. 'Customer acquisition' efforts refer to actions aimed at attracting new customers, where the focus lies on generating new leads and converting prospects into customers, whereas 'customer retention' efforts involve actions aimed at keeping existing customers, building loyalty. The brand religions differ in how they prioritize and define these paths to growth.



The *'Relationship Religion'* is the most profound customer-retention-focused religion, because of its goal to build a long-term relationship (i.e. emotional connection) with consumers. Emotional bonding is also implicitly present in the *'Experience Religion'*, which aims to offer unique and exclusive touchpoint experiences that become memorable. Memorability in its turn leads to customer retention. The *'Classic Religion'* devotes attention to both customer retention and customer acquisition efforts. Nevertheless, with the common phrase 'it is 5 to 7 times more expensive to win a new customer than to keep an existing one', this religion slightly favors investing in customer retention efforts. The *'Influencer Religion'* embraces an integrated approach of acquisition and retention by advocating a member-get-member imperative. It suggests a snowball mechanism where customers and fans (ideally with a substantial 'reach') bring in new ones by sharing brand messages. In this philosophy, retention leads to acquisition. The *'Penetration Religion'* is the most acquisition-focused religion with its continuous hunt for new customers. This school of thought considers a customer base as a leaking bucket, where - in order to sustain and even grow - one must continuously invest in onboarding new customers.

### 3. Loyalty strategy

The brand religions also differ in the type of loyalty they aspire. One can identify two types of loyalty: behavioral and attitudinal. Attitudinal loyalty is based on feelings towards a brand. This is different from behavioral or habitual loyalty, which is due to repeatedly purchasing something. Attitudinal loyalty often leads to behavioral loyalty, yet without the attitudinal component, behavioral loyalty is typically less robust (i.e. it takes less to 'stop' the loyalty of customers that are just behaviorally or habitually loyal than of customers that also have attitudinal loyalty).

Both the *'Relationship Religion'* and the *'Experience Religion'* strongly emphasize the need to build an emotional connection with the brand audience, which ultimately leads to 'attitudinal loyalty'. In contrast to the *'Relationship Religion'* and the *'Experience Religion'*, the *'Classic Religion'* does not consider emotion as the sole loyalty driver. It also emphasizes the importance of more functional elements as drivers of attitudinal loyalty. The *'Influencer Religion'* also tends to favor attitudinal loyalty over behavioral loyalty, as the latter is usually insufficient to drive customers to talk about the brand and/or influence others to buy the brand. Whilst highlighting the strong correlation between customer acquisition and sales growth, this religion does acknowledge the value of recurring customers. Yet, in contrast to other religions, the *'Penetration Religion'* supports 'behavioral' loyalty, namely creating recurrent purchases by being mentally and physically available.

These three dimensions are just a few of the areas where the different brand religions showcase (dis)similarities. Evidently, this is not an exhaustive list and other valuable comparisons could be added. The following overview provides a core summary of the differences and similarities across the five brand religions.



As this visual illustrates, many religions are (somewhat) nuances of others. The *'Influencer Religion'* and the *'Experience Religion'* both welcome the empowered consumer, and both strongly advocate to leverage new, modern channels to build brands and embrace interactivity and customization, making them very compatible. The *'Relationship Religion'*, in its turn, closely links to the *'Classic Religion'* on many aspects. Yet a big difference remains that the *'Relationship Religion'* conceptualizes building brand emotions as the core path to brand growth, while the *'Classic Religion'* also advocates a more functional path. The *'Penetration Religion'* can be considered as the odd one out. It contrasts the most with the other religions. Therefore, combining other religion elements with a *'Penetration'* perspective needs to be done with care to avoid contradicting scenarios.

### The right religion for my brand

In theory, the most advisable option is to streamline all brand efforts into a single brand religion. Choosing a dominant brand religion provides brand owners and marketers with a clear outline of the dimensions to pursue in order to drive brand growth. A clear choice for a specific brand religion forces all stakeholders to pull in the same direction, and clearly identifies the key performance indicators and metrics that will be used to measure brand success. In reality, however, there often is a tendency towards 'best-of-both-worlds' solutions. In the context of brand religions, this implies 'mixing and matching' aspects of the different religions, meaning that a secondary (and possibly even tertiary) layer of brand religion elements is adopted (in addition to the chosen primary religion). Yet key to success is that these components are well-defined and not contradicting.

The choice of a brand religion (mix) depends on a brand's life stage, industry and market context, budget, and strategic focus. For example, the *'Penetration Religion'*, which focusses on brand omnipresence (through mental and physical availability), requires a substantial financial investment. This often makes it a difficult route for market entrants or newcomers on a limited budget. This does not mean entrants must ignore the religion's principles altogether; on the contrary, building and repeating distinctive assets could be a meaningful exercise for any brand, regardless of its life stage. An easier and cheaper route (theoretically) is the one emphasized by the *'Influencer Religion'*, where one identifies the select few that can help spread the brand word. Similarly, other budgetary, life-stage or context elements could influence the choice for a *'Relationship-Religion'*, *'Experience-Religion'* or *'Classic-Religion'* perspective.



At InSites Consulting, we do not believe in a one-size-fits-all approach. No brand is the same, nor should they be measured the same way. Translating the theoretical framework to your brand heritage and ambitions, we co-create the right mix for your brand. Our 'branding and communication research' program is built around three key principles:

- Command: define and align the brand religion principles relevant for your brand
- Create: translate these into your brand efforts and activations
- Conduct: measure impact and performance

The starting point is 'command', gaining understanding and alignment on the brand strategy. Which 'beliefs' do you wish to pursue as a brand and match your brand strategy with? We tailor the theoretical framework to your brand heritage and ambitions, and co-create the right mix for your brand together with consumers. In an inspiring workshop, we immerse you and your (brand) teams in the world of brand religions, exploring what this can mean for your brand reality and brand measurement approach. Consumer immersion initiatives allow to capture current consumer perceptions to identify potential mismatches with who you are and wish to be. In accordance with your brand religion mix, we define the relevant metrics for your brand research program. This results in brand-religion-based immersion and validation studies of brand equity, segmentation, targeting and brand positioning, mental availability, brand distinctive assets, brand archetypes, word-of-mouth & influencers,...

The next step is to 'create' how this can be translated into all your brand activations and efforts. From advertising testing to packaging research, our wide variety of tools and techniques helps shape, opti-

mize and validate all your brand stretch, communication and packaging assets and activations, by means of relevant religion-specific metrics. Through consumer immersion, we explore the consumer permission to stretch the brand or service into a category and discover new opportunity areas. Based on these findings, new brand stretch concepts are developed through ideation and creative crowdsourcing, which are again optimized and validated by consumers. Similarly, we develop brand communication and packaging executions and support at various stages in the development cycle, from getting fresh ideas to optimization and testing, tailored to the chosen religion mix.

Lastly, it is relevant to track your overall brand performance and success, your 'conduct'. Using a tailored set of KPIs in line with your brand religion and strategy, our modular brand, advertising and/or experience-tracking approach measures the pulse of your brand.

The backbone of our branding research solutions is our proprietary online Square platform. This hybrid research community platform does not only facilitate your collaboration with consumers in a structural way, it also activates internal stakeholders by making all brand insights available in one place, bringing them to life through an always-on connection with the consumer, and sharing brand effort learnings across teams and markets, allowing companies to truly shape the future of their brand.

Curious about the right mix for your brand? Get in touch.

In brands we trust.

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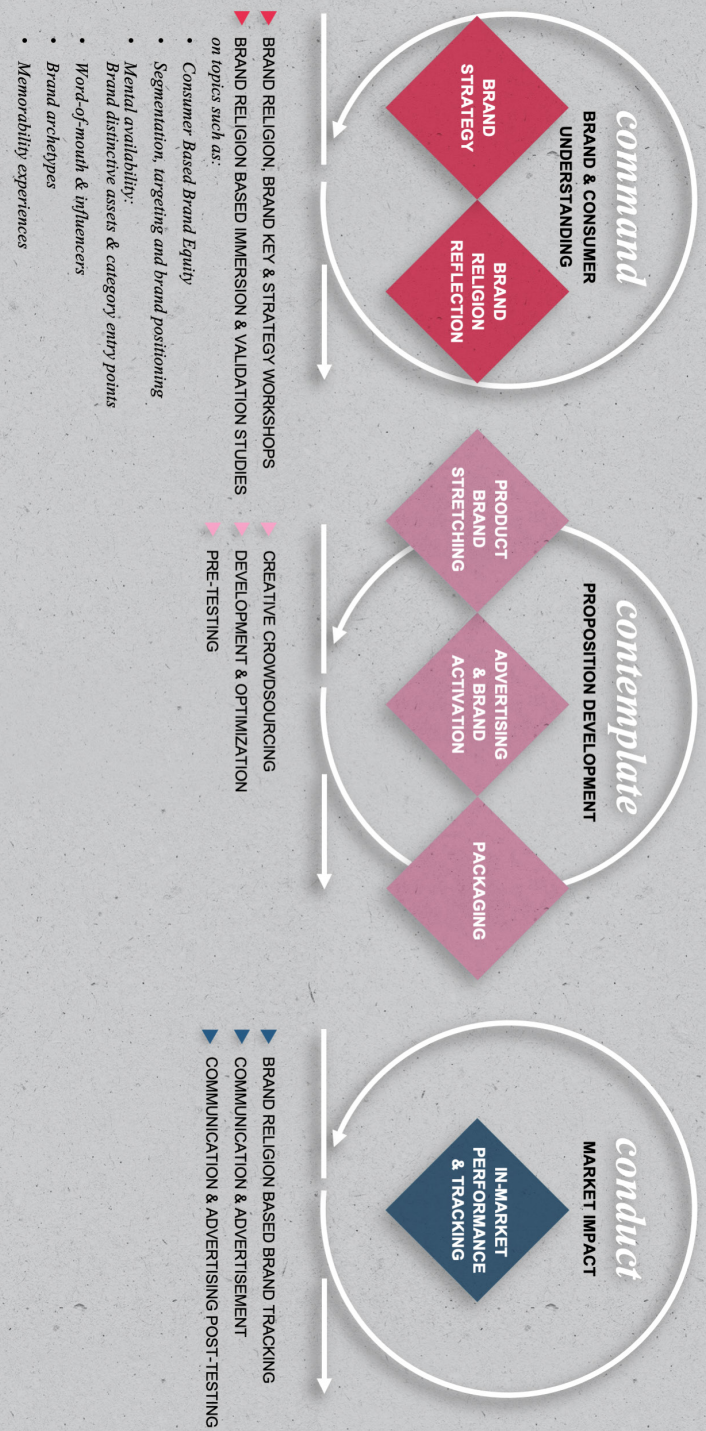
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## THE branding & communication PROGRAM IN DETAIL



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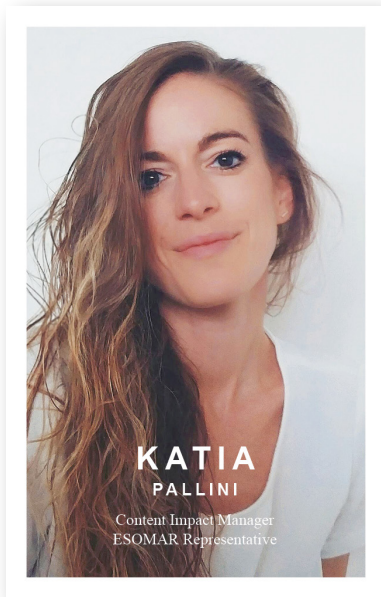
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Marketing research is more than number crunching; it is about understanding why people do the things they do, and what that means for brands. With 10 years of research experience, Katia currently works as a content marketer where she translates the research side of things into digestible yet relevant content.

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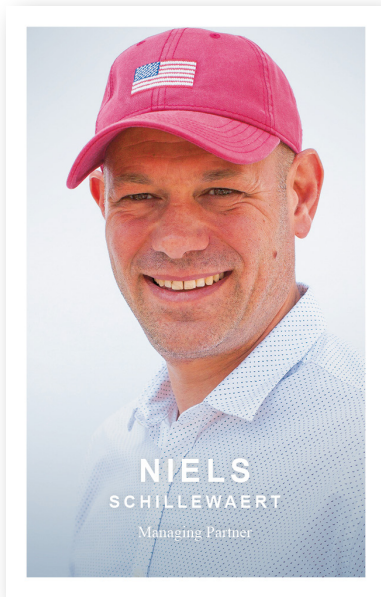
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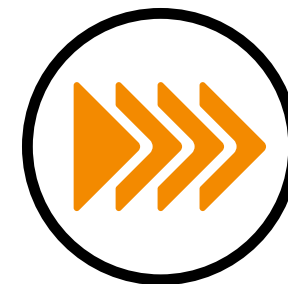
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Niels is the content research specialist for branding. At InSites Consulting's ForwaRD Lab, he laid the ground of many research innovations and thought leadership content. Niels manages a variety of global top accounts and brands. He has as an academic career at Vlerick Business School, Ghent University and Penn State University. He published 30+ articles in leading academic journals. Niels is former ESOMAR President.

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**S**ince the early days of business, marketing gurus have preached their beliefs on how to build strong brands. But with the abundance of models and theories available, clear strategic guidance might become lost in translation. This bookzine aims to simplify the world of marketing, grouping the most popular books, frameworks and beliefs in different school of thoughts or 'brand religions'. The choice in brand religion does not only mark how one defines brand success, moreover which metrics to pursue. So what is your brand religion and are you measuring brand success the right way?

By **Katia Pallini** (Content Marketing Director at InSites Consulting),  
**Niels Schillewaert** (Managing Partner at InSites Consulting) and **Frank Goedertier** (Professor of Marketing & Partner Vlerick Business School)



#### ABOUT INSITES CONSULTING

From the start of InSites Consulting in 1997 until today, there has been only one constant: we are continuously pushing the boundaries of marketing research. With a team of academic visionaries, passionate marketers and research innovators, we empower people to create the future of brands. As one of the most innovative market research agencies in the world (GRIT), we help our clients connect with consumers all over the world.

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