



Agenda

Topic 1. Keller's CBBE Model & Brand Exploratory

Topic 2. Brand exploratory in action: Marketing Research Plan



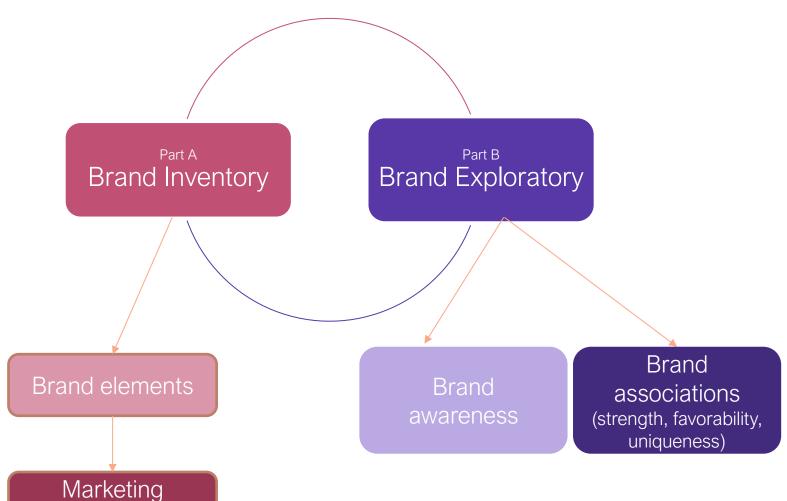
Brand Audit – what is it

"A Brand Audit requires understanding the sources of brand equity from the perspective of both the company and the consumer

Part A: Inventory From the perspective of the company, it is necessary to understand exactly what products and services are being offered to consumers and how they are **marketed** and **branded**.

Part B: Exploratory From the perspective of the consumer, it is necessary to dig deeply into the minds of consumers and tap their **perceptions** and **beliefs** to uncover the true **meaning** of brands and products" (Keller, 2012)

Brand Audit – What is it made of?



programs

The goal of the **Brand Exploratory is to** dig deeply into the minds of consumers and tap their **perceptions** and **beliefs** to uncover the true **meaning** of brands and products

It is rooted in research to understand what consumers think and feel about the brand & the product category it belongs to, to identify sources of equity

- Understand current knowledge and feelings for the brand and its competitors
- 2. Determine depth and breadth of brand awareness, brand image and necessary PoP & PoD with key competitors from the consumer's point of view

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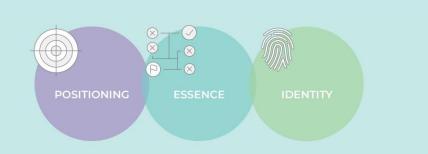
Brand Equity & the Brand Audit

amazon Part B: **Exploratory** DISNEP NETFLIX **PERCEPTIONS EXECUTION** MARKETING MIX (4Ps) **VERBAL IDENTITY** VISUAL IDENTITY

STRATEGY

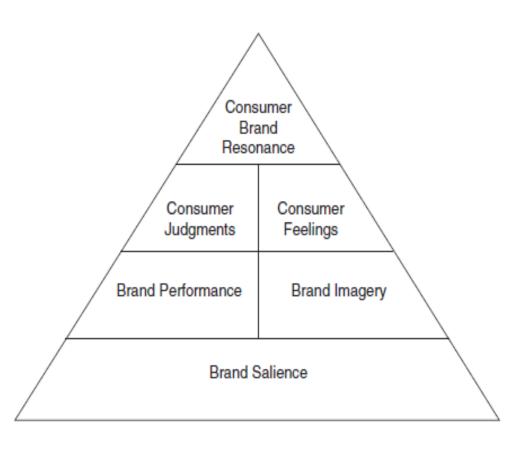
Part A: Inventory

THE BRAND PLATFORM



The Keller model: Customer-based brand Equity (CBBE)

- Basic premise: Power of a brand resides in the minds of customers
- End goal: To create intense, active loyalty relationships with customers
- Building customer-based brand equity requires the creation of a familiar brand that has favorable, strong, and unique brand associations
- Challenge is to ensure customers have the right types of experiences with products & services and their marketing programs to create the right brand knowledge structures:
 - Thoughts
 - Feelings
 - Images
 - Perceptions
 - Attitudes



The Keller model: Customer-based brand Equity (CBBE)

Salience: how easily and often customers think of the brand under various purchase or consumption situations

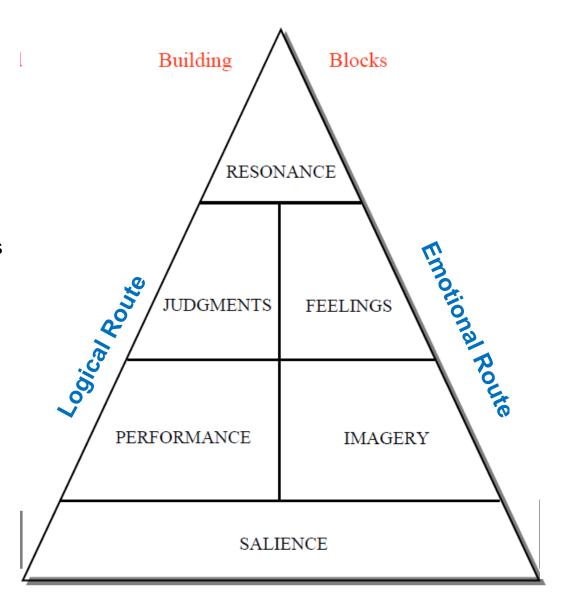
Performance: how well the product or service meets customers' functional needs

Imagery: describes the extrinsic properties of the product or service, including the ways in which the brand attempts to meet customers' psychological or social needs

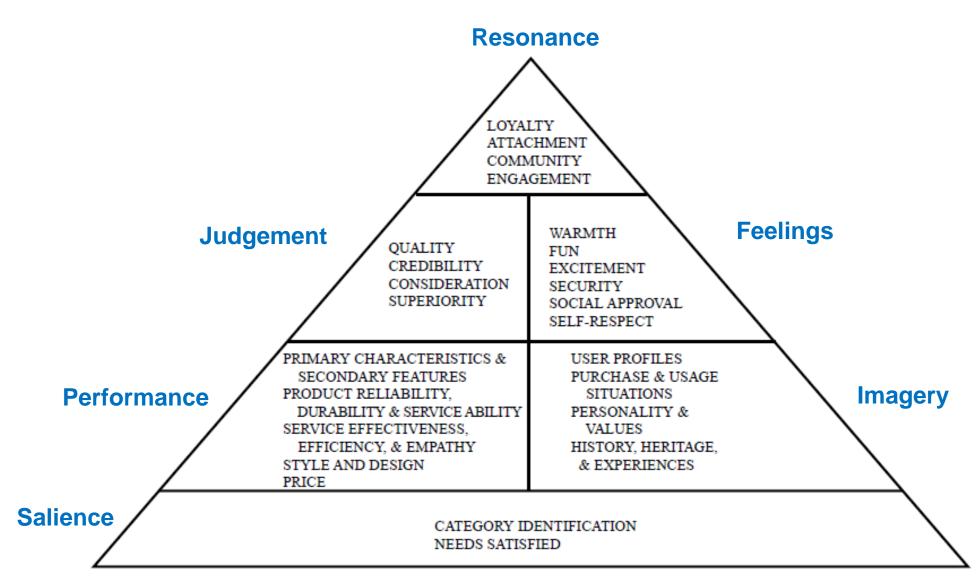
Judgement: consumers' own personal opinions and evaluations

Feelings: customers' emotional responses and reactions with respect to the brand

Resonance: the nature of the relationship customers have with the brand, and how 'in sync' they are



The Keller model: Building blocks sub-dimensions



Which brands of furniture & decoration come to mind?

Have you ever heard of these brands?



sklum.



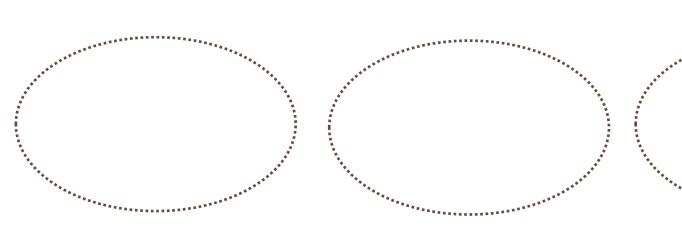








How would you categorize these brands?

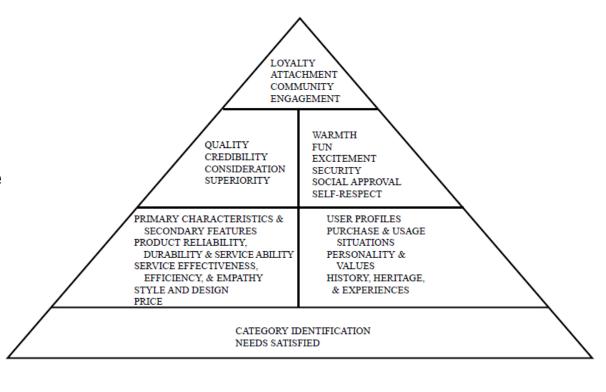


The Keller model: Salience

Salience: how easily and often customers think of the brand under various purchase or consumption situations

- To what extent is the brand top-of-mind and easily recalled, or recognized?
 - Unprompted vs prompted awareness
- Do customers understand the product or service category in which the brand competes?
- Influences the consideration set







Compared to other brands in the category, how well does this brand provide the basic functions of the furniture & decoration category?

How well does this brand satisfy the basic needs of the product category?

What kind of pricing does it use?

How reliable is this brand?

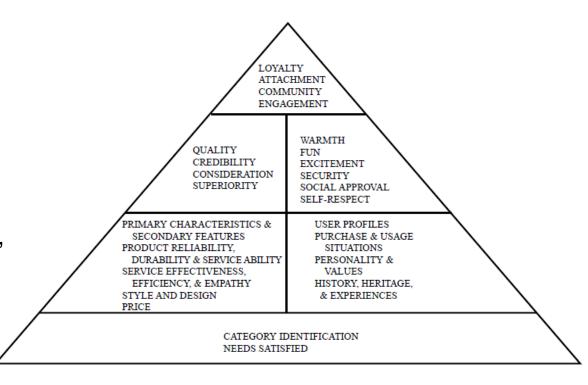
How durable is this brand?

How easily serviced is this brand?

The Keller model: Performance

Performance: what the brand does to meet customers' more functional needs.

- Inherent product characteristics benefits:
 - Reliability
 - Durability
 - Service effectiveness, service empathy
 - Aesthetics: Style, design (size, shape, materials, colors)
 - Price (price tier, volatility, discounts)





If IKEA were a person, what kind of person would they be?
What kind of personality would they have? What job would this person have?

To what extent does thinking about the brand bring up pleasant memories?

What kind of person uses this brand?

How much do you like the people who use this brand?

For which situations would you go to IKEA?

The Keller model: Imagery

 How people think about a brand abstractly rather than what they think the brand actually physically does: Psychological & Social (as opposed to functional) needs

Four important intangible dimensions are:

Brand personality

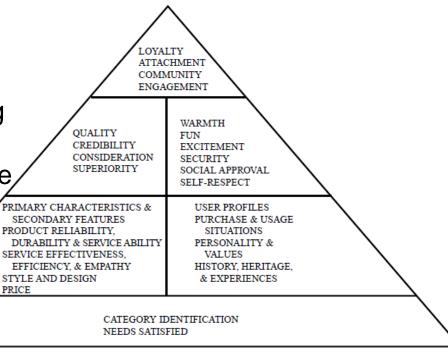
 Personification of a brand: differentiating & enduring set of human characteristics attributed to a brand

• Is at the heart of brand strategy, as it guides the tone of voice and style through which the brand

communicates

History & heritage

- Experiences
- Type of user
 - The type of person that uses the brand



The Keller model: Imagery – type of user









"Hopefully I will see a competent-looking driver, but I know I'll see a soccer mom like I see in every [Hummer] H2 around here."

"I heard a rumor that Porsche was devoting their entire racing budget to the "Cayenne Challenge," an event that pits homemakers from different nations against each other in a challenging obstacle course. ...Events include: 1000 metre grocery dash."





https://www.forbes.com

The Keller model: Imagery – Brand Personality





Brand Personality Dimensions











Sincerity

Excitement

Competence

Sophistication

Ruggedness

Down to
Earth, familyoriented, small
town
Honest, real,
Wholesome,
original,
Cheerful,
friendly,
sentimental

Daring, trendy,
exciting
Spirited, cool,
young
Imaginative,
unique
Contemporary,
up-to-date,
independent

Reliable, hard working, secure Intelligent, technical, corporate Successful, leader, confident

Class: upperclass, goodlooking, glamorous Charm: feminine, smooth

Masculinity:
outdoorsy,
masculine,
western
Toughness:
tough, rugged

Source: Aaker J.

The Keller model: Imagery – Brand Personality



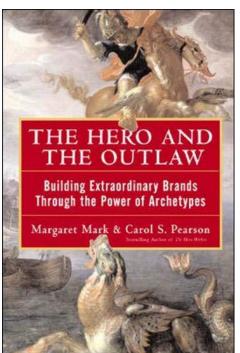






Brand Personality: Archetypes





Archetypes: images and thoughts that have universal meaning across cultures and may show up in dreams, literature, art or religion.

We immediately connect to these, as they stem from our 'collective sub-conscious'

Carl Jung identified several key archetypes. "The hero & ourlaw" brought this in the realm of branding

Archetypes are 'the heartbeat of a brand' because they **convey a meaning that makes customers relate** to a product as if it actually were alive in some way, they have a relationship with it and care about it."

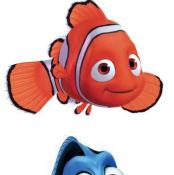
Brands with "tightly defined" archetype identities increased their value by 97% more over six years than "confused brands" or brands with characteristics from many different archetypes.

Brand Personality: Archetypes









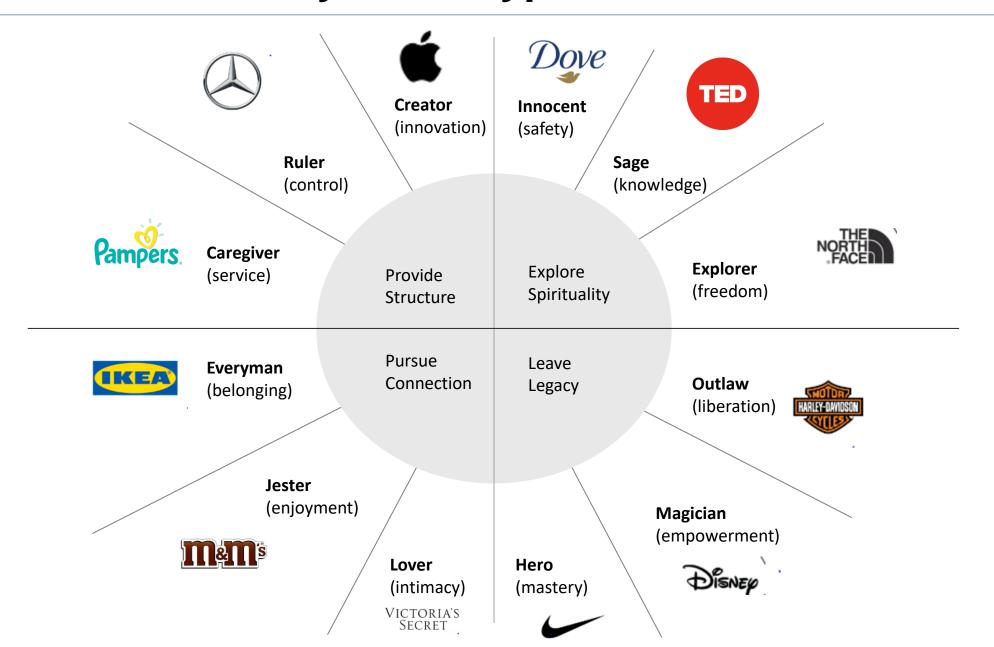








Brand Personality: Archetypes



Brand Personality: Connecting Archetypes & Aaker's personality framework

Archetype	Archetype Manifestation	Personality Trait	Brand Personality Dimension
Ruler	Stability	Reliable	Competence
	•	Tough	Ruggedness
		Upper Class	Sophistication
Creator	Stability	Imaginative	Excitement
	Independence	Unique	Excitement
		Upper Class	Sophistication
Caregiver	Stability	Embraced	Sincerity
	Belonging	Welcoming	Sincerity
		Genuine	Sincerity
Jester	Belonging	Genuine	Sincerity
	Mastery	Charming	Sophistication
	-	Imaginative	Excitement
Lover	Belonging	Welcoming	Sincerity
	Stability	Charming	Sophistication
	•	Embraced	Sincerity
Regular Guy	Belonging	Welcoming	Sincerity
	0 0	Reliable	Competence
		Genuine	Sincerity
Outlaw	Mastery	Adventure	Excitement
	Independence	Tough	Ruggedness
		Charming	Sophistication
Magician	Mastery	Embraced	Sincerity
	Belonging	Reliable	Competence
		Imaginative	Excitement
Hero	Mastery	Adventure	Excitement
	·	Genuine	Sincerity
		Tough	Ruggedness
Sage	Independence	Unique	Excitement
	Stability	Reliable	Competence
	•	Imaginative	Excitement
Explorer	Independence	Adventure	Excitement
	1	Unique	Excitement
		Tough	Ruggedness
Innocent	Independence	Genuine	Sincerity
	Mastery	Unique	Excitement
	,	Reliable	Competence

Source: Bechter, Farinelli, Frey, 2016



What is your overall opinion about the quality of this brand?
Does this brand offer good value?

How innovative are the makers of this brand?

To what extent to does this brand understand your needs?

How much do you admire this brand?

How superior is this brand to others in the category?



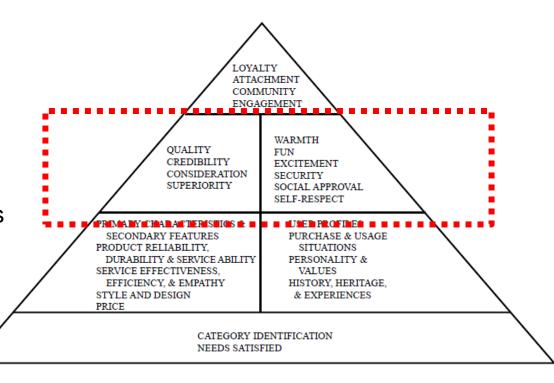
How does this brand make you feel?

Does this brand give you a feeling of excitement?

Does this brand give you a feeling of social approval?

The Keller model: Judgements & Feelings

- Feelings: Consumers' emotional responses and reactions to the brand
 - Can be mild or intense; positive or negative
 - Feelings of warmth/ fun/ excitement/ security/ selfrespect
- Judgments: Consumers' overall brand evaluations
 - How consumers combine performance and imagery associations to form different kinds of brand opinions
 - Quality, satisfaction, credibility, consideration, superiority
- To what extent do the makers of this brand
 - understand your needs
 - care about your opinions
 - have your interests in mind





To what extent do you consider yourself loyal to this brand?

What would you do if this brand was not available in your area?

To extent do you love this brand? Is this brand special to you?

Do you identify/feel a connection with other people who use this brand?

Do you like to talk about this brand with others?

Do you like to visit the brand's website?

The Keller model: Resonance

Brand loyalty is a measure of a **consumer's attachment to a specific brand**

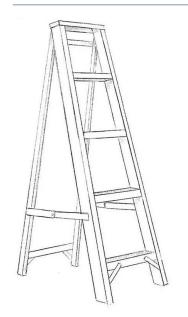
 Committed consumers guarantee future income streams as well as facilitating brand extensions by transferring any positive associations to new brands.

The extent to which customers feel that they are "in synch" with the brand

- Intensity or depth of the psychological bond that customers have with the brand or others
- Level of activity engendered by this loyalty
- Repeat purchase rates
- The extent to which consumers seek out brand information, events, or other loyal customers

- I consider myself loyal to this brand
- I feel this is the only brand of this product that I need
- I love this brand
- I identify with the people who use this brand
- I feel a connection with the people who use this brand
- I am always interested in learning more about this brand
- I am proud to have others know that I use this brand

The Keller model: Resonance – 4 levels



Behavioral Loyalty

Customers' repeat purchases and the amount or share of category volume attributed to the brand

Attitudinal Attachment

When customers view the brand as being something special in a broader context



Sense of Community

When customers feel a kinship or affiliation with other people associated with the brand.

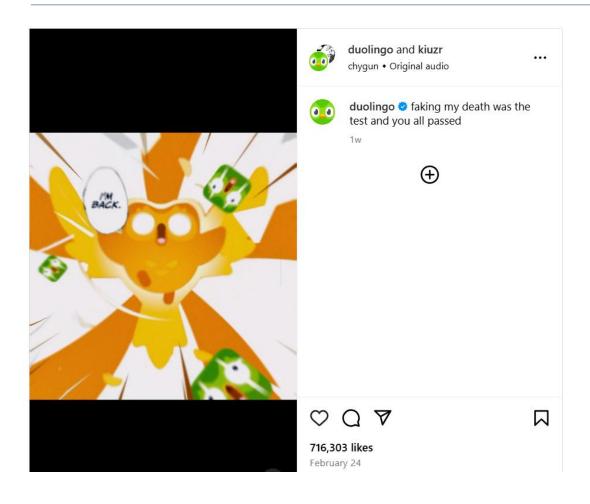
Active Engagement

When customers are willing to invest personal resources on the brand – time, energy, money, etc. – beyond those resources expended during purchase or consumption of the brand





The Keller model: Resonance – 4 levels



In an <u>Instagram video</u> released on Monday, the language learning app quickly recapped the owl's death before the bright green bird is seen bursting from flames with a comic book-style text bubble that reads, "I'm back."

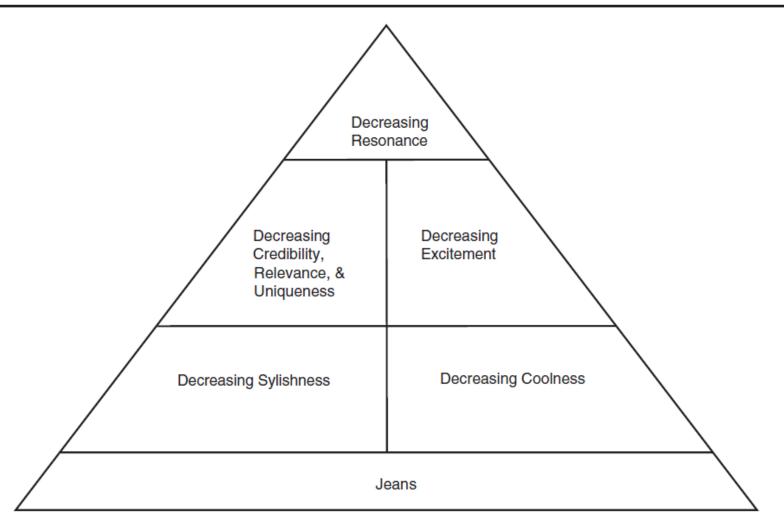
"Faking my death was the test," Duo wrote in the caption, "and you all passed."

The quick-paced video shows the completion of several in-app challenges, implying that users' increased activity on the app may have brought the beloved mascot back to life.

In fact, the stunt was part of a global campaign in which the app pawned different countries against one another to see which could earn the most XP (experience points) to save Duo. As of Monday, the top three performing countries were the United States, Germany and Brazil, according to the Bring Back Duolingo website.

CBBE – Levi's example

Figure 4. CBBE Pyramid Diagnosis for Levi's (Selected Key Dimensions)



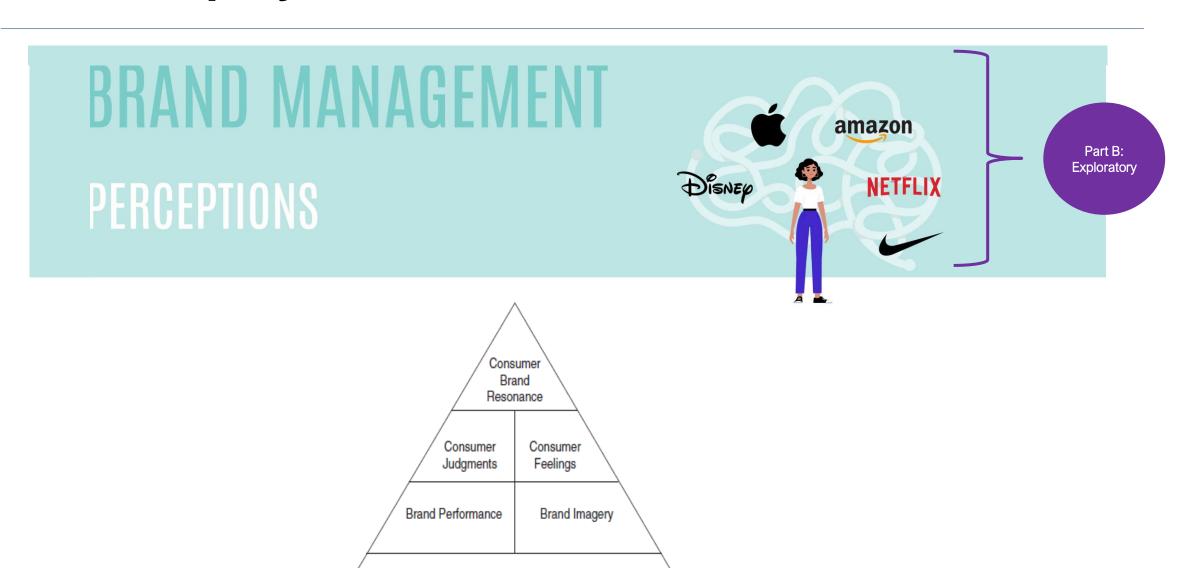
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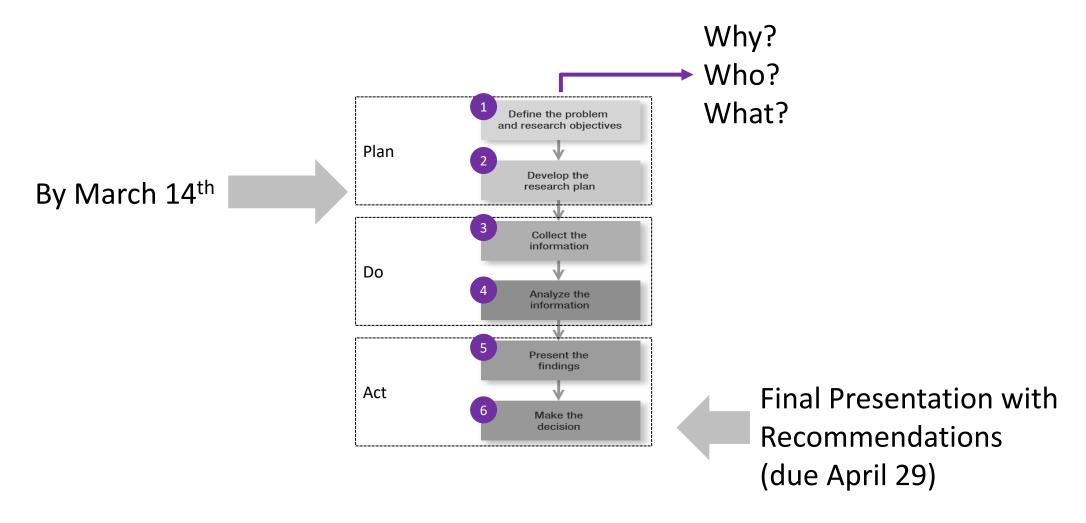


Brand Equity & the Brand Audit

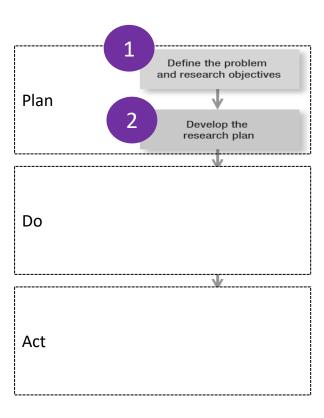


Brand Salience

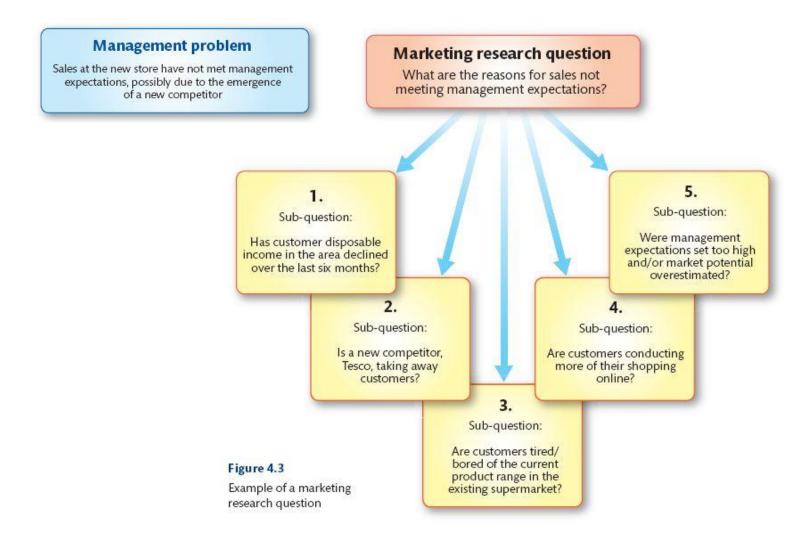
The marketing research process



The marketing research process



Planning marketing research: Define the Problem



For Brand Audit, example:

Problem

The brand is losing relevance in the market

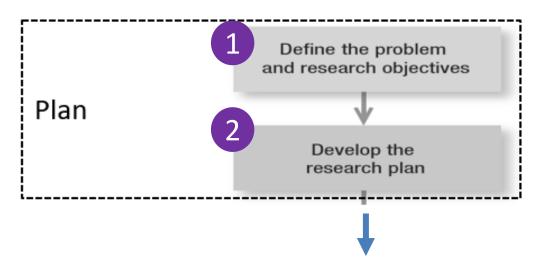
Research Question

What is the current equity of the brand?

Research sub-questions

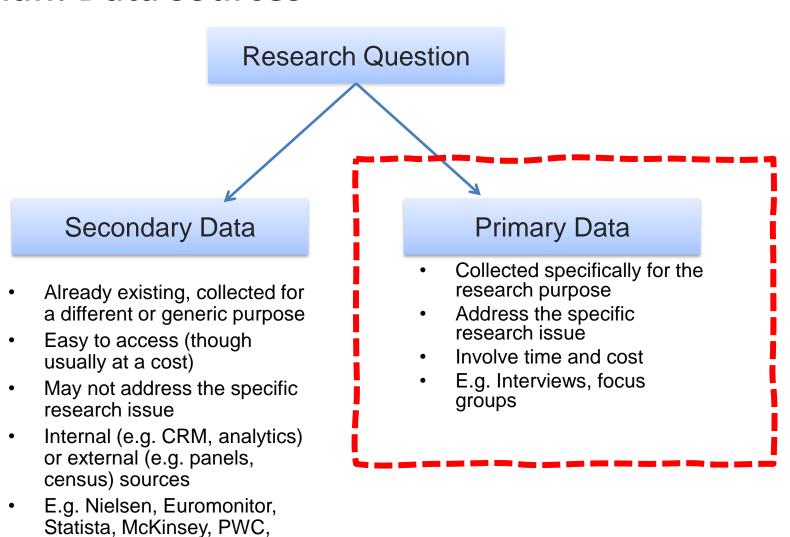
- What are consumers' habits and needs in the category?
- What are consumers' current perceptions of competing brands?
- How can the brand differentiate itself?

Planning marketing research



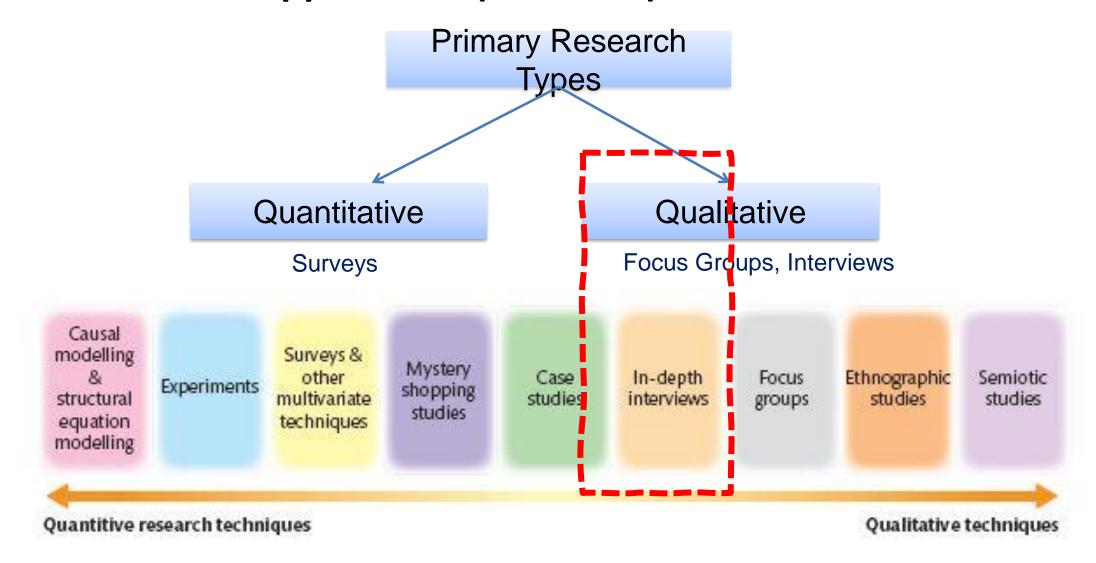
- Data sources
- Research approaches / methods
- Sampling plan

Research Plan: Data sources



BCG reports

Research Plan: Approaches (Methods)



Interviews

- Conducted on a 1:1 basis to gain a deep understanding of individuals
- Uncover underlying motivations, beliefs, attitudes, feelings...
- Enable deeper insight, associating responses to respondent
- Challenging to analyse and interpret data objectively
- Recorded
- Follows a discussion guide to ensure consistency, but can diverge
- Time consuming, but easier to set up
- Risks related to biased moderator

Research Approaches: Types of Primary Data

QUANTITATIVE RESEARCH

- Answers to YES/ NO HOW MANY / MUCH WHERE WHEN HOW OFTEN
- Provides statistical information (%, #)
- Research instrument: structured questionnaire with closed-ended questions mainly
- Sampling: sample size to ensure statistical validity, randomly generated population sample

QUALITATIVE RESEARCH

- Answers to WHAT WHY HOW
- Provides details, not statistical information
- Research instrument: Discussion guide & open ended, in-depth questions
- **Sampling**: group homogeneity, but not statistical significance

Research Approaches: Types of Primary Data

QUANTITATIVE RESEARCH

- Types of questions:
 - Yes / no
 - How much / many
 - To what extent....
- Answers fit in exact boxes
- E.g.
 - Do you own any pets (Yes / No)
 - How many pets do you own (1, 2, 3-5, 5+)
 - What types of pets do you have (Please select: Cat, Dog, Bird, Turtle, Other/Please specify)
 - How strongly do you Agree/Disagree with the following statements about your pet (I love my pet, I feed my pet 3 times a day..)

QUALITATIVE RESEARCH

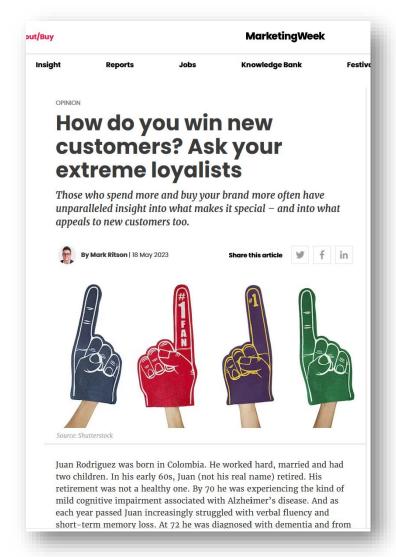
- Types of questions:
 - Please describe a time....
 - How did this make you feel..?
 - Why would you say this?
- Responses do not fit in boxes (i.e can diverge)
- E.g.
 - Please describe a time when your pet misbehaved. How did it make you feel? How did you react?
 - How did you decide to adopt your second pet?

Sampling plan - considerations

Sample

A group of people taking part in a market research project, selected to be representative of the target market overall

- Sampling unit: who to survey
 - Different sample composition depending on the issue. E.g.
 - -Users vs. non-users
 - -Light vs heavy users vs lapsed users
 - Novice vs Experts
 - -Men vs women
 - -Older consumers vs Younger
 - Filters or Screening questions: ensure that sample includes the relevant population (E.g. Gender, Age, Income, Product usage / knowledge, Nationality)
- Sample size: how many people should participate in the research?
 - Surveys: Minimum 100
 - Interviews: min. 20 individuals



Sampling plan – sampling screener

- 2. In the past 4 weeks, which of the following have you purchased?
- 3. In the past 4 weeks, how many times have you purchased the following drinks? (ASK ONLY FOR THOSE THEY ANSWERED IN Q.4)

BEHAVIORAL

	Purchased Past 4	# Times Past 4 Weeks				
	Weeks?	1	2	3	4	5+
Bottled Water	o No o Yes →					
Bottled Flavored Water	o No o Yes →					
Bottled Ice Tea	o No o Yes →					
Bottled Flavored Ice Tea	o No o Yes →					
Bottled Lemona de	o No o Yes →					
Bottled Juice	o No o Yes →					

(IF THEY HAVE PURCHASED 2 OR MORE DIFFERENT TYPES OF BEVERAGES, RECRUIT A GOOD MIX)-(IF 0 or 1 TERMINATE)

4. Now, I'd like to readyou two statements. For each one, please tell me if you strongly agree, agree, neither agree or disagree, disagree or strongly disagree. (READ STATEMENTS AND REPEAT SCALE AS NEEDED)

PSYCHOGRAPHIC

4		1	2	3	4	5
		Strongly	Agree	Neither	Disagree	Strongly
		Agree		Agree or		Disagree
				Disagree		
	A					
	I am concerned about bacteria and germs in the					
	food I eat and beverages I drink					
	В					
	When choosing a product, I always try to					
	consider the manufacturer's environmental track					
	record and practices in my decision					
	·		,			

QUOTA 1: MUST ANSWER A (1 OR 2) AND B (1,2 OR 3) ONLY

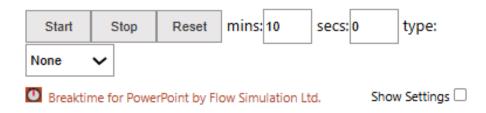
What participants were we looking for this study?



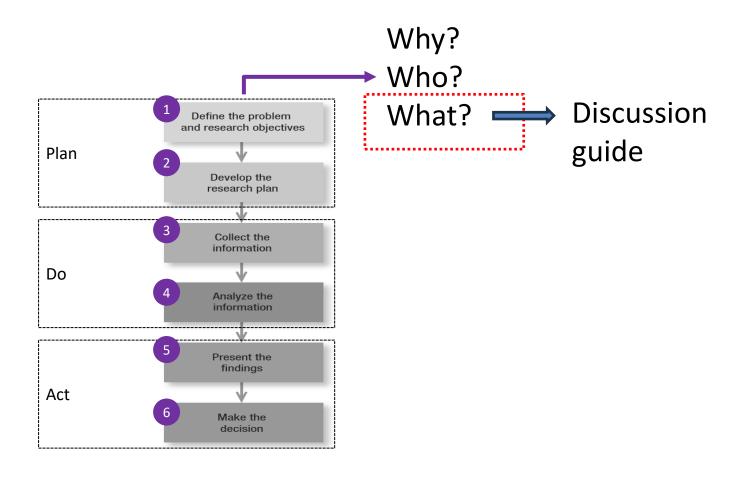
Concerned about germs and bacteria in beverages, or not?

Who will you interview for your project?
Why?
Which screening criteria will you use?

10:00



The marketing research process



Research instrument development: Discussion guide

- Step 1: Start with the overall structure: Main sections/themes you'd like to explore (follow template on Moodle)
 - E.g. Salience, Performance, Imagery, Judgement, etc, or Category, Awareness, Associations, or any other way that you find useful based on your Research Objectives
 - Consult the sub-dimensions of the Building Blocks to clarify what you are looking for in each theme
 - Focus on those that seem more relevant for your brand & adapt
 - Make sure you include category understanding questions and any other topic you've identified as potentially problematic for the brand

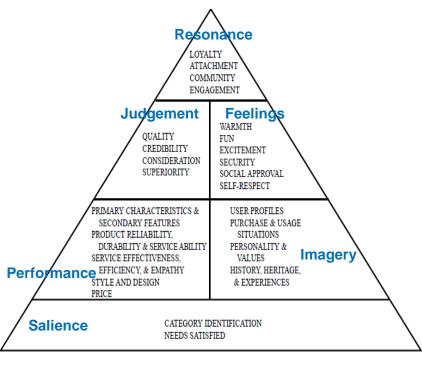


Figure 2. Sub-dimensions of brand building blocks.

Research instrument development: Discussion guide

Discussion Guide template

NOTE: The below template is an *indicative* discussion guide *structure* to ensure all the relevant topics are covered during the interviews. You will need to customize and adapt it to your own brand, based on the brand's issues you've identified in the Inventory phase and the specific Management problem you are trying to solve. In the end, you should be able to fill out Keller's CBBE model for your brand and understand PoPs, PoDs and vulnerabilities of your brand as it relates to its competitors.

Introduction

- Respondent introduction, e.g. greeting, topic of discussion (describe as
 a discussion on the general product category, not your specific brand),
 name, etc.
- Explain what to expect from the process (how long it will take, confidentiality, ask permission to record).
- Explain that there are no right or wrong answers you are only looking for the personal experience and opinion.

Warm up

- Tell me about the last time you bought [product category] (the idea here is to get the participant in the right frame of mind to think about the category in a natural & personally relevant way)
 - What was the experience like? What did you like/dislike about it?

Category habits & involvement

- Awareness of brands
- Purchase habits
- Decision making
- Needs routine usage
- Shopping experience
- Information sources
- XX

Brand Equity: Perceptions of main brand & competitors (1-2) (competitors can include those that participants bring up and/or those you have identified as key competitors in the Inventory stage)

NOVA SCHOOL OF BUSINESS & ECONOMICS

- o Brand Equity: Salience
 - XX
 - XX
- XX
- o Brand Equity: Imagery
 - XX
 - XX
 - XX
- o Brand Equity: Performance
 - XX
 - XX
 - XX
- Brand Equity: Emotions
 - XX
 - XX
 - XX
- o Brand Equity: Judgement
 - XX
 - XX
 - XX

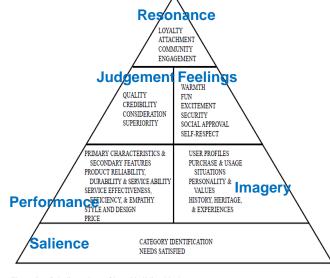


Figure 2. Sub-dimensions of brand building blocks.

<u>Specialized questions</u> (depending on any other issues you may have identified from the Inventory, and depending on who is in your sample)

- XX
- XX

Closing

 Thank the respondent for their time and answer any questions they may have

Research instrument development: Discussion guide

- Step 2: Translate the topics into specific questions that can be used in a discussion (open-ended, not quantitative)
 - Start the discussion from a general (category) point of view, and move to the specific (brand & competitors)
 - Consult the Keller reading for specific questions suggestions by building block
 - Techniques that can be used: Free associations, Projective techniques, Image/card sorts
- Try out the discussion guide to ensure logical flow & highlight missing information
- Compare to your Research Objectives to ensure you have covered everything you need

Research instrument development: Discussion guide – question examples

Appendix. Candidate Measures of Brand-Building Blocks

I. Salience

What brands of product or service category can you think of? (using increasingly specific product category cues)

Have you ever heard of these brands?

Which brands might you be likely to use under the following situations?

How frequently do you think of this brand?

II. Performance

Compared to other brands in the category, how well does this brand provide the basic functions of the product or service category?

Compared to other brands in the category, how well does this brand satisfy the basic needs of the product or service category?

To what extent does this brand have special features?

How reliable is this brand?

How durable is this brand?

How easily serviced is this brand?

Discussion guide development: Category & Behavior Understanding (indicative)

Category Attitudes

- What would you say are the following categories about?
 What do they do for you? What type of people would need each?
- What comes to you mind when you think of [category] products?
- How would you describe this category? Use 3 adjectives to describe it
- How important is [main function of product] for you?
- Why would someone buy [category] products? (e.g. to look good, for pampering, necessity) Is it a luxury or a necessity?
- What would the ideal [category] product be able to do for you? (if you could design the perfect product). Is there any product/brand that comes close to this ideal? Why? Why not?
- What are the main trends in this category?

Routine Usage

- Describe the typical usage of [category] products
- Which kind of products do you use?
- Do you use a combination of products? Are they from the same brand? If you could only afford 1 product, what would it be? (most important one)
- When do you use these? (occasion)
- If you could ask an expert 2 questions to improve the way you [main category benefit] what would they be?

Purchasing

- What are the important factors when buying a [product]? Why?
- Do you know which products are the best for you?
- Are you buying the best products for you?
- How easy is it to choose? Why? What would make it easier?

Discussion guide development: Imagery (indicative)

The Goal is to understand the following

- User profiles
- Personality and values
- History, heritage, experiences
- Purchase & Usage situations

- Examples from Keller (MSI)
 - To what extent do people you admire and respect use this brand?
 - How much do you like people who use this brand?
 - How well do the following words describe this brand?
 - How appropriate are the following situations to use this brand?
- Other (free associations & Projective techniques)
 - What comes to mind when you think of this brand?
 - Use 3 adjectives to describe this brand
 - If this brand were a person, what would they be like?
 What type of music would they be listening to?
 - Probe: for attributes from Aaker's Personality framework

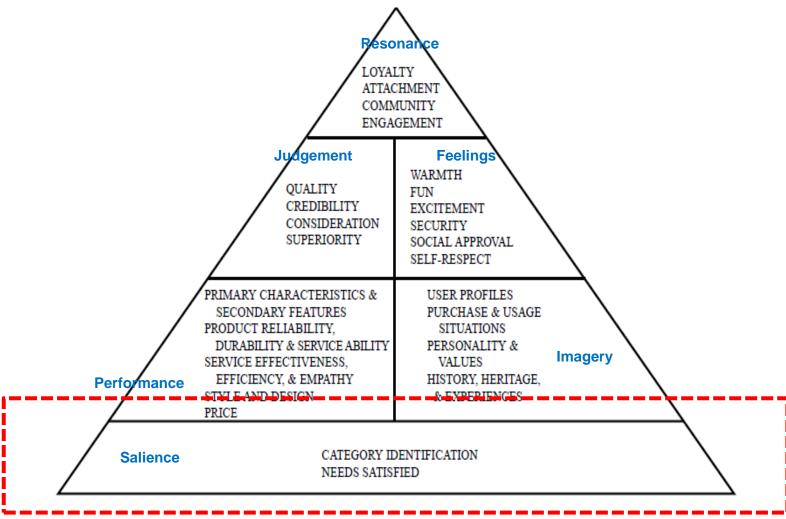


Figure 2. Sub-dimensions of brand building blocks.



What brands might you be likely to use under these situations?

Looking to moisturize my face

Searching for a moisturizing shower gel

Aiming to use the latest anti-aging technology

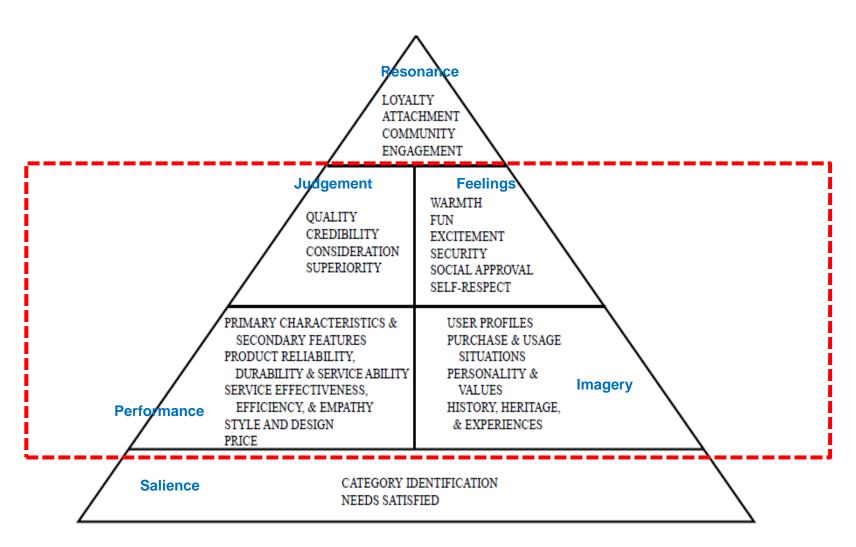


Figure 2. Sub-dimensions of brand building blocks.



Qualitative Research Techniques: Free Associations

- Can also gauge relative strength, favorability, uniqueness of the associations
 - Order of elicitation (what comes to mind first will most likely be a strong association)
 - Comparing associations with those for competitors provide an indication of their relative uniqueness
- Follow up questions can also be used to probe deeper and understand the associations

- Questions that can be used as follow-up
 - What do you like about the brand? What do you dislike?
 - What do you find unique about the brand? How is it different from other brands? In what ways is it the same?
 - Who uses the brand? What kind of person?
 - When and where do they use the brand? In what situations?
 - Why do people use the brand? What do they get out of using it?
 - How do they use the brand? What do they use it for?

Qualitative Research Techniques: Projective Techniques



Qualitative Research Techniques: Projective Techniques





Qualitative Research Techniques: Image sort

- Participants sort images (from magazines, etc, or even logos) into meaningful groups and provide a label or description for each group
- Useful for eliciting competitive sets & knowledge (Salience), Personality traits (Imagery), Emotions (Feelings)
- Useful for the Salience building block
 - E.g. Print logos of the extended competitive set and ask participants to
 - Group them, and label the category
 - Place them in the product category/usage occasion they think fits best

Hotels

 Useful if there is a gap between the company's offerings and the associations by consumers. E.g. Booking.com

Booking Booking

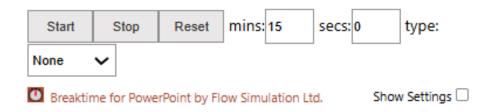
Renting cars

Booking concert tickets

Booking flights

Download the Discussion Guide template and start including the appropriate questions

15:00



For next time

What do you have to do?

Session / Date	Topic	Due	Required Readings
1. Feb 5	Course introduction What is a brand?	Select into groups by Feb 7 by 7pm (Moodle)	Keller: 1
2. Feb 12	Brand Equity Brand Audit (A): Inventory	Submit on Moodle: Feb 14, by 7pm: Team Brand Top 3 choices	Keller:_2 (p. 68-78), 3, 4, & 8 (p. 293-299)
3. Feb 26	Brand Platform: Positioning, Identity, Essence, Values		Keller: 9
4. Mar 5	WORKSHOP: Brand inventory & Brand Platform		Materials from session 2 & 3
5. Mar 12	Brand Audit (B): Exploratory & the CBBE model	Due: Sampling plan and discussion guide by March 14	 Keller: Building Customer-based Brand Equity (Moodle) Keller: 2 (p. 79-end) Kapferer: 7
6. Monday 17/3 MAKE UP	Brand loyalty and engagement	Case study: Taylor Swift In-class quiz	McKinsey Consumer Decision Journey (2009) (Moodle) Ten years on the consumer decision journey: where are we today? (Moodle)
	No class 26/3 — exam period	Submit on Moodle: Individual Assignment, by March 28, 7pm	

