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The meaning of a brand? An archetypal approach

An archetypal approach

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Abstract

Purpose – The purpose of this paper is to analyze customers' perceptions about brand personality in different cultural environments, checking if the archetypal framework of Mark and Pearson (2001) applies to different brands across countries.

Design/methodology/approach – The authors measured consumers' perceptions in different cultural contexts through a survey, and received 537 valid questionnaires from Portugal, Brazil, Colombia and Peru, countries that have some similar indicators of cultural proximity. The authors wanted to verify if the words and sentences that respondents related to each brand were coherent with the archetype/brand, and the homogeneity of the results in different cultural contexts.

Findings – Empirical evidence shows that there is proximity between the literature review and the associations – words and sentences – that consumers from different countries make with those brands. This consistency of results is significantly higher for word associations.

Originality/value – Regardless of the results, the perceptions of consumers expressed through the selected words were often diverse and heterogeneous among countries. This could possibly indicate insufficient efforts from global brands toward a coherent brand personality/global-archetypal approach. Therefore, managing brand personality deserves more attention and marketers must understand consumer behavior patterns in different markets.

Keywords Brand personality, Brand, Brand identity, Archetypes, Costumer perception

Paper type Research paper

Introduction

Consumers identify themselves with specific brands, not for their promises, but rather for the purpose that the brand embodies (Adi *et al.*, 2015). Strong brands are much more than a product or service, are a unique set of companies' promises and customers' perceptions, interactions and experiences, which affect long-term relationships. Large corporations must focus on brand reputation and the legitimacy of the purpose they serve (Crisan and Bortjun, 2017). And brand managers must track the impact of increased brand interactions and experiences across consumers, cultures and countries on customers' brand perceptions, especially those that relate to brand identity and personality, since consumers may not necessarily notice brand personality as intended (Malär *et al.*, 2012).

A strong brand identity comprises the conceptualization and operationalization of a very sophisticated brand strategy that meets the challenges of the different environments where

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brands are present, particularly global brands. The approaches to define identity consider the personality traits of a brand, similar to those of a “person,” as one of its components (Aaker, 1990), or as “Brand Identity Prism” (Kapferer, 1995).

Brand archetypes are part of brand personality. Marketing managers may use an archetypal approach to brand personality in order to define what a brand is, what it stands for, and the relationship with its consumers, thus providing a real meaning associated with their customers’ desires and motivations (Mirzaee and George, 2016; Mark and Pearson, 2001). In an archetypal approach, the focus is on the customer’s brand experience and brand meaning, and the products are merely secondary means to achieve the expected brand meaning (Högström *et al.*, 2015). Consumers’ individual brand perceptions are influenced not only by their exposure to a marketer’s brand stories, and to the media and pop culture, but also by personal experiences and word of mouth (Adi *et al.*, 2015). These external influences lead to different consumers’ perceptions across cultures.

We conducted a quantitative research to examine brand archetype perceptions of three global brands – Facebook, Apple and Amazon – in four countries – Portugal, Brazil, Colombia and Peru. We analyzed: if consumers’ perceptions of the archetypes of international brands are homogeneous in different countries; if the characterization of brands through words and archetypes is homogeneous and accepted by consumers; and whether the existing brand/archetype designations in the literature are still accurate, given the degree of innovation and growth of these brands and consumers’ perceptions across countries. To reach these objectives we checked the words and sentences that respondents related to each brand, as well as the coherence of the associations with the archetype/brand and the homogeneity of the results in different cultural contexts. This analysis has a clear managerial and academic contribution, in the research areas of brand identity and brand personality, leading managers and researchers to a deeper understanding of consumer behavior patterns through brand archetypes, to a more effective marketing strategy and to new research tools. The study of consumers’ perceptions of brand personality is a major research topic (Lam *et al.*, 2013; Sichtmann and Diamantopoulos, 2013).

Literature review

A brand is not just a product or a company name, but rather a complex entity that shows the organization’s commitment to the customer. It is the promise that a company makes to the customer, regarding what the product will provide and how it will fit into the consumer’s business (Campbell, 2002). A company’s products should have a unique identity. In the eyes of consumers, brands communicate their own identities to society, to specific groups and/or to individuals (Strizhakova *et al.*, 2008). Consumers may associate them with different meanings – such as perceived quality, self-identity, group identity, values, family traditions, national traditions –, which may affect their functional, experiential and symbolic benefits (Siamagka *et al.*, 2015). Not all brands develop a symbolic approach and try to tell a story. Consumers unconsciously prefer to tell and to hear stories, as they give life to others’ experience or to their experience with the brand (Woodside, 2006). Compelling stories raise expectations about the brand, which will likely increase the positive emotion when trying it, especially if the relationship between the brand and the stories seems authentic (Hwang, 2017).

International firms may have a portfolio of local, international or global brands: local brands are present in just one country or region, international brands have global elements of their marketing strategy or mix, and global brands use the same marketing strategy or mix in all target markets (Schuiling and Kapferer, 2004). Although a global brand approach has important potential advantages – such as economies of scale, of communication costs and speed of new products’ innovations – the use of centralized marketing strategies may lead to less intimate relationships with local markets, with the local competitive environment and with specific customers’ needs (Schuiling, 2001).

Brands can be a source of organizational differentiation and value creation for companies and customers. Regarding competitive advantage, a company can develop a consistent brand strategy, making sure that the brand keeps the promise, due to the relationship established with the customers. A successful brand provides a unique added value that meets customers' needs, such as familiarity, reliability, risk reduction and personality (Strizhakova *et al.*, 2008). Added value provides intangible benefits, such as feelings, ideas and effects to the brands (Rodrigues, 2008). Brands are an important attribute of consumers' culture, not only for the utility value of the commodity, but also for its symbolic strength. It helps consumers to sustain their identity projects and symbolic meaning (Bengtsson, 2006; Elliott and Wattanasuwan, 1998).

The consumer-brand relationship involves processes of brand identification and product categorization, as well as sensorial, affective and cognitive experiences. These inputs will integrate the brand concept through individual and cultural signaling, and develop an attitude and a relationship (Schmitt, 2012). In addition, the centralization of organizational efforts and marketing teams is also important to reach a greater consensus and create synergies within the organization (Ceballos and Juliana, 2014). Therefore, archetypes mediate between products and customers' motivation, providing an intangible meaningful experience.

A company develops its brand identity from different assets and competencies, which leads to the creation of brand value through customers' unique experiences, and the creation of a brand-specific meaning. Ideally, brand identity is a valuable and unique experience that competitors cannot imitate. Therefore, brand can become a competitive advantage and the expression of an intention (Urde, 1999).

Brand identity is a central issue in marketing research, with two major approaches: Aaker (1991) proposed a preliminary approach that analyzes it under four different perspectives: the brand as a human, a product, a symbol and an organization. Kapferer (1995) claimed that the essence of brand identity is the organizational answer to central questions regarding brand's individuality, consistence, values and signs. This allows companies to specify their brands' meanings (Louis and Lombart, 2010).

Brand personality and brand archetypes

Brand personality is one of the main components of brand identity frameworks, and it is mandatory for brand managers to develop a systematic process to manage this central brand identity dimension. Although Aaker's brand personality scale has been successfully used in many studies, it has some relevant limitations in an international context and in some industries (Escobar-Farfán *et al.*, 2016). In Chile, Rojas-Méndez *et al.* (2004) could not validate this scale in the automobile industry, and Ahmad and Thyagaraj (2014) called attention to validation problems of certain dimensions, in some countries. This led to the development of brand personality scales in local markets, such as in France (Ferrandi *et al.*, 2000), USA (Austin *et al.*, 2003), Germany (Hieronimus, 2003), and Russia (Supphellen and Grønhaug, 2003), among others.

As an alternative to Aaker's (1997) brand personality scale, some brand and marketing executives adopted the platform of archetypes to represent brands. In a marketing perspective, we use archetypes to interact with consumers' deepest motivations and give meaning to the products and brands associated with their conscious and unconscious desires (Mark and Pearson, 2001). The unconscious is divided in personal unconscious – images and impulses from an individual's life experiences –, and a collective unconscious that includes a big variety of shared cultural images and impulses, known as archetypes (Zehnder and Calvert, 2004). Marketing will further advance by understanding the collective unconscious, and how it affects consumers' perceptions and actions (Dominici *et al.*, 2016).

Archetypes are universal topics of human existence, which are evident in the common traits of characters and storylines in myths, fairy tales, novels and films (Faber and Mayer, 2009; McPeck, 2008). Societies do not exist without communication and representation and, to a certain extent, they share their cultural archetypal articulations (Zehnder and Calvert, 2004).

Many brands are representations of “modern myths,” containing cognitive elements, emotional elements, and unconscious processes. Brand archetypes and myths are considered allegories that support the construction of brand-consumer relationships (Muniz and Woodside, 2015). In this context, specific brands may play a pivotal role in enabling consumers to achieve the proper pleasures that facilitate an implicit brand recognition and consumer-brand relationships and experiences (Woodside *et al.*, 2008). The growing interest in archetypes indicates a major transformation in the attitudes of marketing professionals with respect to the unknown regions of the unconscious, and the search for increasingly sophisticated ways to attract, retain and remain relevant to the brand community.

To access these patterns, we examined the verbal vehicles that consumers use to communicate this archetypal theme: their own stories. Brands can capture the essential meaning of the category to which they belong and communicate their messages in subtle and refined manners (Mark and Pearson, 2001). Thus, consumers’ memories associated to brands often materialize into stories through which patterns of archetypes can be identified.

The use of archetypes allows creating a spiritual and mystical identity for brands, helping to establish a deeper and more significant connection with consumers regarding their unconscious aspirations (Siraj and Kumari, 2011). Archetypes mediate between products and customer motivations, providing an intangible experience of meaning.

Mark and Pearson (2001) used Carl Jung’s archetypal model and proposed a business application (Figure 1) that is frequently used. In their model, 12 archetypes are classified into four human main drivers: “belonging and enjoyment,” “independence and fulfillment,” “stability and control” and “risk and mystery.” According to Bosley (2017), Mark and Pearson’s research is the groundbreaking work that links archetypes to brands (Table I).

Although each archetype is autonomous in terms of personality traits, Mark and Pearson (2001) proposed a two-axis framework to group archetypes into clusters. The framework considers their common attributes, according to the four major human drivers (see Figure 1): the *x*-axis links the need to belong and enjoy with independence and fulfillment; the *y*-axis links the need for stability and control with risk/mystery. These motivations are deep, and pull customers in different directions, so they should be included in marketing and brand strategies.

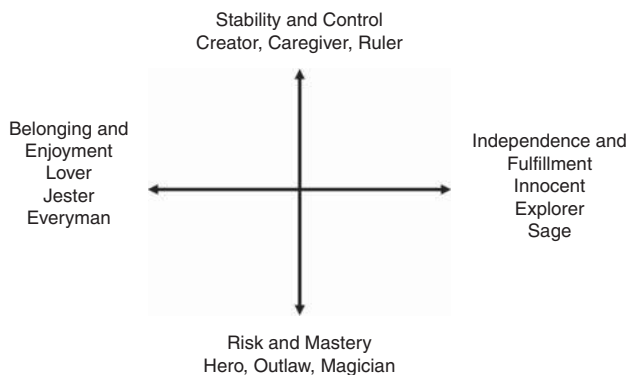


Figure 1.
Major human drives
and brand archetypes

Source: Adapted from Mark and Pearson (2001)

An archetypal approach

| Archetype | Description | Characteristic | Examples of brands |
|-------------|--|---|-----------------------------|
| Caregiver | They want to protect others from harm, to help, to take care | Caring, compassion and generosity. Protective, devoted, sacrificing and maternal/parental. Benevolent, friendly, helping and trusting | Nivea |
| Regular guy | They have the basic desire of connection with others; want to belong, to fit in | Working class or common person, the neighbor, ordered, sometimes fatalistic and self-depreciative, realistic, and disappointed humanist. Having the basic desire of connection with others, want to belong, to fit in | GAP, Visa |
| Innocent | Desire for simple purity, goodness, happiness, faith and optimism | Pure, faithful, naive, child-like character; humble, tranquil, looking for happiness and simplicity | Coke, Disney |
| Explorer | Desire to be free, to find out who they are by exploring the world. Long to experience a better, more authentic and rewarding life | Independent, adventurer. Seeks discovery and fulfillment. Often solitary and indomitable. They want to discover who they are, seeking to explore the world and have an authentic and fulfilling life | Amazon, Starbucks |
| Sage | They want to find the truth. Use their intelligence and analysis to understand the world | Value enlightening and knowledge, truth and understanding; a bit pretentious. They use their intelligence to understand the world, to discover the truth | McKinsey, Harvard |
| Hero | They want to prove their own worth through courageous and difficult action. Aim to exercise mastery to improve the world | Courageous, impetuous, rescuer, crusader. Wants to prove his/her own value through courageous and tough action. Triumphs over adversities. Their skills are persistence, strength, determination, discipline, challenge and ability | Nike |
| Outlaw | Their basic desire is revenge or revolution: They want to destroy what does not work for them or to society | Represented by the rebellious iconoclast, the survivor and a rule-breaker. Can be wild, destructive and a struggler. Revolutionary | Harley Davidson, Apple |
| Magician | They want to know the fundamental laws and functioning of the world or the universe and realize dreams | The visionary, the alchemist. Focused on natural forces, transformations and metamorphoses. They want to know how the world works and influence its transformation | Vanish, Pantene |
| Lover | They want to achieve intimacy and experience sensual pleasure. Aim to maintain a relationship with people | Intimate, romantic, sensual and especially passionate. Seductive, delighted, tempestuous and whimsical. Warm, playful, erotic and enthusiastic partner | Victoria's Secret, Godiva |
| Creator | They want to create something valuable and lasting, participate in forming a vision | Represented as innovative, artistic, self-driven, inventive, a dreamer. Often non-social. Focused on quality | LEGO |
| Jester | They want to live in the present with full joy and entertain the world | Living for fun. Usually ironic and mirthful. Sometimes irresponsible. Live in the moment | Pepsi, Burger King |
| Ruler | They want to control, raise a family, and/or build a successful company or community | Represented by a strong sense of power and control. The leader, the boss, and the judge. Influential and stubborn. High level of dominance | American Express, Microsoft |

Sources: Adapted from Mark and Pearson (2001), Faber and Mayer (2009)

Table I.
Mark and Pearson's
(2001) archetypes

The creator, caregiver and ruler archetypes are associated to those who intend to organize the world, helping individuals to feel more secure. These people's main concerns regard financial aspects, health and loss of control.

The lover, jester and regular guy archetypes refer to the need to connect to others and to be accepted, to belong, but not to change the world. These archetypes focus on people who relate to others and on love/community. Their concerns are exile, orphaning, abandonment, and engulfment (submission/destruction).

The hero, outlaw and magician archetypes represent those who want to change and improve the world, make dreams come true. These are brave protagonists, capable of facing challenges, taking risks, breaking the rules, and changing their realities. They fear impotence, powerlessness and ineffectiveness (the disinterest of others).

The innocent, explorer and sage archetypes relate to the pursuit of happiness. They focus on independence and autonomy, rather than belonging. These archetypes help people to pursue happiness, mainly dealing with the fear of entrapment, conformity, and inner emptiness.

A systematic and strong management of all the components and related items for different stakeholders is mandatory, in order to build a strong brand identity. Companies must monitor stakeholders' insights on how the brand is sensed in their perspective, whether or not they are customers (Urde, 2016).

The perceived brand archetype, and how it relates to the desired brand identity, is a relevant topic to study across market segments and countries: individual perceptions and purchasing patterns are partly determined by the collective values of the local community, including Hofstede's indicators of cultural proximity (Hofstede Centre, 2017). Furthermore, usage patterns and motivations may vary across countries and affect customer's perceptions (Pentina *et al.*, 2016). According to Chau *et al.* (2002), we may expect that people with different cultural backgrounds will respond differently to a global generic website.

Methodology and field research

The empirical research focused on the analysis of customers' perceptions regarding three leading global brands – Facebook, Apple and Amazon –, which are among the largest brands, with high growth rates (Interbrand, 2015) in the four countries. We measured the intensity of the brand-archetype associations by identifying the sentence and number of words that the respondents mentioned, among the three that describe each archetype, and to which they associated the brand. We used the software SPSS 21 to analyze data.

There is theoretical support for associating the three brands to specific archetypes and clusters. Apple is included in the creator archetype and the “stability and control” cluster (Haddad *et al.*, 2015; Muniz and Woodside, 2015); Facebook can be included in the “Regular Guy” archetype and in the “belonging and enjoyment” cluster (Roberts, 2010); and Amazon can be included in the explorer archetype and the “independence and fulfillment” cluster (Mark and Pearson, 2001; Hwang, 2017). For each archetype, it is possible to associate specific sentences and words. We did not assign words to the “risk and mastery” cluster because we did not use any brand previously included in that cluster. Nevertheless, we kept the corresponding sentences, as detailed in Table II.

In relation to each archetype specifications, Mark and Pearson (2001) proposed a major sentence, as detailed in Table II. They also highlighted a list of major attributes, closely related to each archetype. In this study, we chose to use multiple items (three words for each archetype) to represent these theoretical concepts, as a means to reduce measurement errors and get a better concept estimation (Hair *et al.*, 2009). Based on an extensive bibliographical research, including a detailed analysis of Mark and Pearson's (2001) framework, three academic researchers with multi-cultural backgrounds carried out autonomous analyses of the different archetypes, and proposed a list of words/personality traits to characterize each

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| Archetype | Sentence | Word | Cluster |
|-----------|---|----------------------------------|------------------------------|
| Sage | "The truth will set you free" | Learning, Expert, Credibility | Independence and Fulfillment |
| Innocent | "Free to be you and me" | Optimism, Simplicity, Goodness | |
| Explorer | "Don't fence me in" | Freedom, Adventure, Independence | |
| Ruler | "Power isn't everything. It's the only thing" | Power, Control, Authority | Stability and Control |
| Creator | "If it can be imagined, it can be created" | Creativity, Innovation, Vision | |
| Caregiver | "We live to serve" | Friend, Care, Protection | |
| Regular | "Love thy neighbor as yourself" | Democracy, Regular, Empathy | Belonging and enjoyment |
| Guy | | | |
| Lover | "I only have eyes for you" | Sensuality, Pleasure, Intimacy | |
| Jester | "A life without fun is a life half-lived" | Enjoyment, Humour, Relaxation | |
| Hero | "Where there's a will, there's a way" | Not considered | Risk and Mastery |
| Magician | "It can be done!" | | |
| Outlaw | "Rules are meant to be broken" | | |

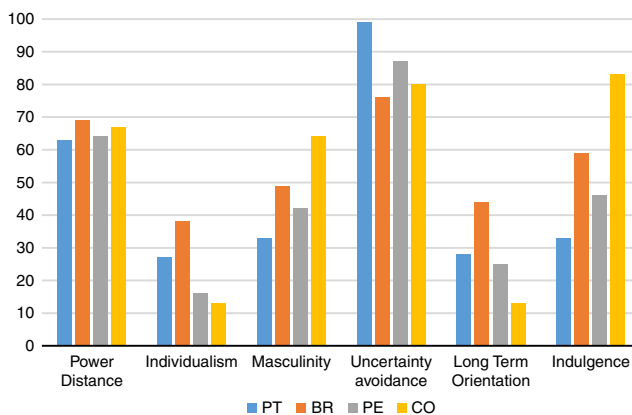
Source: Adapted from Mark and Pearson (2001)

Table II.
Archetypes-related sentences and words

archetype. These lists were shared and debated, in order to achieve a final 27-item scale to apply in a multi-cultural survey, where participants were asked to make a link between the brand and each word. For each personality trait, respondents had to say if it was related (Yes or No) to each brand: we used three brands, each one included in a different cluster of three archetypes: 3 brands \times 3 clusters \times 3 archetypes = 27 words.

We measured consumers' perceptions in the different cultural contexts through a survey conducted in two Spanish-speaking countries, namely, Colombia (CO) and Peru (PE), and two Portuguese-speaking countries, Brazil (BR) and Portugal (PT). According to the Hofstede Centre (2017), these countries have very similar indicators of cultural proximity in terms of power distance and uncertainty avoidance, but indicators such as individualism and indulgence show very different results (see Figure 2). It seemed relevant to study how three brands with a global approach behave in this diverse cultural contexts.

We conducted an online survey between March and May 2016, with a young population, mostly undergraduates. There were 537 valid questionnaires, from participants between



Source: Adapted from Hofstede (2017)

Figure 2.
Cultural proximity indexes

17 and 40 years old, with an average value of 27.2 years, and 41 percent were women. The distribution among countries was 116 valid questionnaires in Portugal, 130 in Brazil, 190 in Peru and 101 in Colombia.

Results from apple

Apple was founded in 1976 and its predominant archetype nowadays is the “Creator.” According to their corporative statement “Apple designs the best personal computers in the world [...] leads the digital music revolution [...] reinvented the mobile phone and is defining the future of mobile media and computing devices” (Apple, 2013). For this brand, we observed a significant coherence regarding the archetype mentioned in the literature (creator) and consumers’ perceptions, through words and sentences. As shown in Table III, the most commonly words used in all countries were associated with the creator archetype.

The word Innovation is the most cited (between 85 and 95 percent along the countries), followed by creativity and vision. By analyzing the words that respondents associated with the Apple brand, the dominant archetype was creator (22 percent of all words mentioned), followed by Sage (15 percent) and Ruler (13 percent). On average, respondents associated 2.58 (out of 3) of these words with the Apple brand; among the countries, we confirmed that Brazil is the one where the association of the brand with the Creator archetype was more evident: 80 percent of the respondents mentioned the three words.

Answers regarding the sentences associated with the Apple brand were also very consistent: 61 percent of the respondents associated it to the sentence “If it can be imagined, it can be created.” The second most mentioned sentence was associated with the Ruler archetype, which belongs to the same cluster and received only 8 percent of the answers.

We conducted a χ^2 test to analyze the independence of the observation of archetypes (sentences and words), with respect to the countries of origin. We concluded that in the case of the most present archetypes for this brand – Creator (p -value = 0.000) and Sage (p -value = 0.000) –, consumers’ perceptions were not independent of the country of data collection, with a significance level of 0.05. However, considering only South American countries, the most present archetype for this brand (Creator) reached a p -value = 0.025. That is, in these three countries, individuals’ perceptions toward Apple are independent of their place of origin, as observed in Table IV.

The analysis of the chosen words showed that the most relevant clusters of archetypes are Stability and Control (44 percent), Independence and Fulfillment (30 percent) and Belonging and Enjoyment (26 percent), as shown in Table V.

By analyzing the results from the literature review and respondents’ associations, expressed through words and sentences, we concluded that all associations are very clearly related to the reference cluster (Stability and Control), which is consistent with the literature.

| No. | Word | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) | Archetype | Cluster |
|-----|--------------|--------------|------------|----------|--------------|-----------|-----------|------------------------------|
| 1 | Innovation | 95 | 95 | 85 | 93 | 91 | Creator | Stability and control |
| 2 | Creativity | 85 | 90 | 82 | 92 | 87 | Creator | Stability and control |
| 3 | Vision | 64 | 85 | 75 | 73 | 75 | Creator | Stability and control |
| 4 | Expert | 72 | 70 | 63 | 71 | 68 | Sage | Independence and Fulfillment |
| 5 | Power | 76 | 72 | 58 | 56 | 65 | Ruler | Stability and control |
| 6 | Credibility | 49 | 76 | 57 | 68 | 62 | Sage | Independence and Fulfillment |
| 7 | Enjoyment | 53 | 44 | 44 | 49 | 47 | Jester | Belonging and enjoyment |
| 8 | Optimism | 50 | 53 | 47 | 34 | 47 | Innocent | Independence and Fulfillment |
| 9 | Pleasure | 40 | 55 | 40 | 51 | 46 | Lover | Belonging and enjoyment |
| 10 | Independence | 37 | 43 | 43 | 36 | 40 | Explorer | Independence and Fulfillment |

Table III.
Apple – the ten most mentioned words

As shown in Figure 3, most of the sentences are associated with the Stability and Control cluster (72 percent). The same happens with the words (46 percent), although, in this case, the dispersion is larger, especially in the cluster of Independence and Fulfillment (33 percent).

An archetypal approach

Results from Facebook

Facebook was associated to the words Enjoyment, Friend and Humor, which belong to the Jester and Caregiver archetypes (see Table VI).

The analysis of the words that respondents associated with the Facebook brand shows that the Jester archetype is the most relevant: 64 percent of the respondents associated at least two of the words, and 34 percent associated all three words with this archetype. Then, the Regular Guy (41 percent) and Ruler (38 percent) archetypes were associated with

| Archetype | PT BR CO PE 4 countries | BR CO PE 3 countries | PT BR 2 countries | Words global archetype share |
|-------------|----------------------------|-------------------------|----------------------|------------------------------|
| Creator | 0.000 | <i>0.025</i> | 0.000 | 22 |
| Sage | 0.001 | 0.001 | <i>0.651</i> | 15 |
| Ruler | <i>0.013</i> | <i>0.013</i> | <i>0.725</i> | 13 |
| Caregiver | 0.000 | 0.001 | <i>0.960</i> | 9 |
| Lover | 0.004 | <i>0.079</i> | <i>0.107</i> | 9 |
| Innocent | <i>0.013</i> | <i>0.324</i> | 0.001 | 9 |
| Explorer | <i>0.342</i> | <i>0.173</i> | <i>0.878</i> | 8 |
| Jester | <i>0.046</i> | <i>0.026</i> | <i>0.905</i> | 8 |
| Regular guy | <i>0.013</i> | <i>0.187</i> | <i>0.107</i> | 5 |

Note: The significance level used for italic values was 0.05

Table IV.
Apple χ^2 test in
the countries –
three words

| | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) |
|------------------------------|--------------|------------|----------|--------------|-----------|
| Stability and control | 45 | 47 | 45 | 46 | 46 |
| Independence and fulfillment | 35 | 32 | 33 | 31 | 33 |
| Belonging and enjoyment | 20 | 21 | 22 | 24 | 22 |

Table V.
Apple – association
of words to the cluster
of archetypes

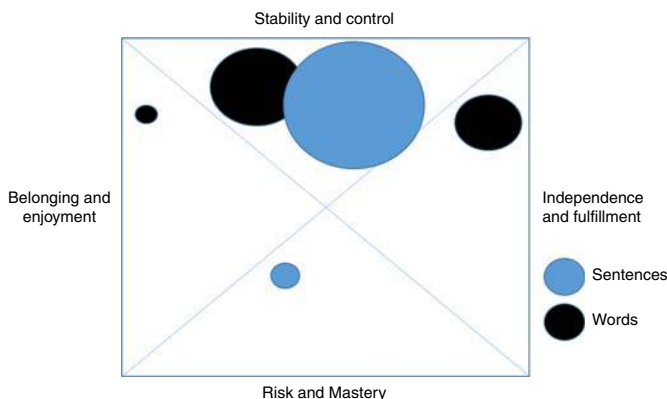


Figure 3.
Scatter diagram:
Apple

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| No. | Word (%) | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) | Archetype | Cluster |
|-----|------------|--------------|------------|----------|--------------|-----------|-------------|------------------------------|
| 1 | Enjoyment | 62 | 79 | 82 | 67 | 74 | Jester | Stability and control |
| 2 | Friend | 79 | 53 | 76 | 61 | 68 | Caregiver | Stability and control |
| 3 | Humour | 76 | 60 | 68 | 50 | 65 | Jester | Stability and control |
| 4 | Power | 53 | 58 | 48 | 52 | 53 | Ruler | Independence and Fulfillment |
| 5 | Pleasure | 51 | 55 | 57 | 42 | 52 | Lover | Stability and control |
| 6 | Control | 49 | 67 | 41 | 46 | 50 | Ruler | Independence and Fulfillment |
| 7 | Regular | 48 | 40 | 49 | 54 | 48 | Regular guy | Belonging and enjoyment |
| 8 | Relaxation | 53 | 16 | 71 | 35 | 47 | Jester | Independence and Fulfillment |
| 9 | Freedom | 47 | 52 | 50 | 32 | 46 | Explorer | Belonging and enjoyment |
| 10 | Empathy | 28 | 40 | 51 | 36 | 40 | Regular guy | Independence and Fulfillment |

Table VI.
Facebook – the ten most mentioned words

two and three words, respectively; on average, the respondents associated 1.83 of the words of the Jester archetype with Facebook brand, 1.22 words of the Regular Guy archetype and 1.21 of the Ruler archetype.

A χ^2 test analyzed the independence of the most relevant archetypes from the countries of origin, as shown in Table VII. We concluded that the observations were independent of the country of origin for the Regular Guy archetype (p -value = 0.059), for all countries. For the Jester archetype, this independence did not occur in any of the analyses (p -value = 0.000). Moreover, in the Ruler case, it happened only among the respondents of Portugal and Brazil (p -value = 0.522). The analysis of the independence of the archetypes in relation to gender generated high p -values (greater than 0.1), thus confirming this independence.

The analysis of the Facebook brand affiliation to clusters of archetypes, made through word associations, showed a clear predominance of the Belonging and Enjoyment cluster, as stated in the literature, in all countries, especially in Peru. The most relevant archetype cluster is Independence and Fulfillment, and there are important differences in consumers' perceptions among the countries, especially in the Belonging and Enjoyment cluster, where Portugal and Brazil present a level of perception very different from Peru and Colombia (see Table VIII).

| Archetype | PT BR CO PE 4 countries | BR CO PE 3 countries | PT BR 2 countries | Words global archetype share (%) |
|-------------|----------------------------|-------------------------|----------------------|----------------------------------|
| Jester | 0.000 | 0.000 | 0.000 | 18 |
| Regular guy | <i>0.059</i> | <i>0.031</i> | <i>0.333</i> | 13 |
| Ruler | 0.002 | 0.001 | <i>0.522</i> | 12 |
| Explorer | 0.000 | 0.001 | <i>0.056</i> | 11 |
| Creator | <i>0.228</i> | <i>0.675</i> | <i>0.038</i> | 11 |
| Lover | 0.002 | 0.000 | <i>0.333</i> | 10 |
| Caregiver | 0.000 | <i>0.015</i> | 0.000 | 10 |
| Innocent | <i>0.008</i> | <i>0.139</i> | <i>0.030</i> | 8 |
| Sage | 0.002 | 0.004 | <i>0.602</i> | 7 |

Table VII.
Facebook – χ^2 test along countries and clusters of countries – three words

Note: The significance level used for italic values was 0.05

Table VIII.
Facebook – association of words to clusters of archetypes

| | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) |
|------------------------------|--------------|------------|----------|--------------|-----------|
| Stability and control | 33 | 34 | 30 | 35 | 32 |
| Independence and fulfillment | 29 | 27 | 27 | 24 | 27 |
| Belonging and enjoyment | 38 | 39 | 44 | 41 | 41 |

By comparing the results of the literature with the answers, the words clearly relate to the Belonging and Enjoyment cluster. Furthermore, the chosen sentences were more dispersed, with a slight predominance of references to the Jester archetype and the cluster Independence and Fulfillment (see Figure 4).

In the case of Facebook, there is a relevant homogeneity with respect to the words and clusters of the archetype present in the literature, even though some relevant disparities are apparent regarding the mentioned sentences and the depth of the associated words. The word/archetype associations are more dispersed regarding the Facebook brand, and there is less independence in the countries.

Results from Amazon

Although Amazon does not have a specific webpage, nor stores and offices in Portugal, Peru or Colombia, native consumers use the international webpage with local delivery for several categories of products.

The words associated to Amazon brand were Credibility, Expert and Learning, that is, all of the Sage archetypes belonging to the Independence and Fulfillment cluster. The Sage archetype was the most mentioned in all countries, although its relative importance ranged from 38 percent in Portugal to 55 percent in Colombia.

Amazon's associations with the words for Caregiver, Creator and Ruler archetypes belonging to the Stability and Control cluster are also very important. Hence, in global terms, these two clusters are very significant (see Table IX). On the other hand, the literature associates Amazon with the Explorer archetype, while in our study it was not often mentioned.

The collected data supported the conclusion that Sage archetype is the most relevant for Amazon brand: of the four words more often mentioned, the three defined words were among them. In total, 61 percent of the respondents associated the Amazon brand with at least two words of the Sage archetype. The second most relevant archetype (Creator) had a much lower association rate (36 percent), and the Ruler and Caregiver archetypes achieved a level of association (two or more words) of 33 and 32 percent, respectively. In terms of clustering, Independence and Fulfillment was also prominent, but Stability and Control had a very close result (see Table X).

The most selected sentences relate Amazon brand to the Caregiver archetype "We live to serve" (29 percent) and the Hero archetype "Where there's a will, there's a way" (21 percent). There was no consistency between the words and sentences, in terms of the archetypes and

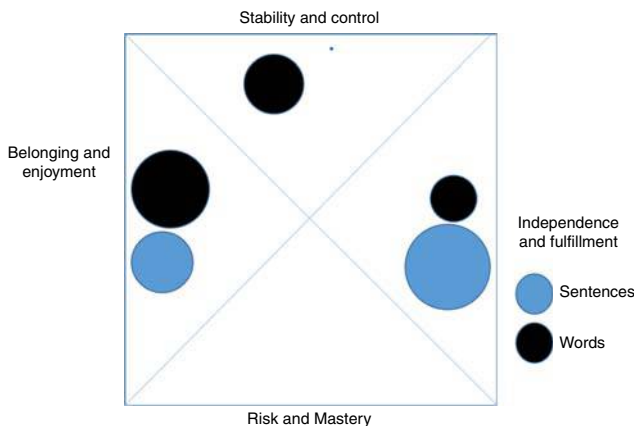


Figure 4.
Scatter diagram:
Facebook

REGE

| No. | Word | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) | Archetype | Cluster |
|-----|--------------|--------------|------------|----------|--------------|-----------|-----------|------------------------------|
| 1 | Credibility | 47 | 77 | 55 | 63 | 67 | Sage | Independence and Fulfillment |
| 2 | Expert | 34 | 48 | 49 | 55 | 45 | Sage | Independence and Fulfillment |
| 3 | Vision | 22 | 51 | 36 | 46 | 42 | Creator | Stability and control |
| 4 | Learning | 32 | 46 | 42 | 47 | 42 | Sage | Independence and Fulfillment |
| 5 | Care | 39 | 36 | 38 | 27 | 37 | Caregiver | Stability and control |
| 6 | Independence | 33 | 39 | 32 | 35 | 36 | Explorer | Independence and Fulfillment |
| 7 | Innovation | 20 | 43 | 32 | 38 | 36 | Creator | Stability and control |
| 8 | Simplicity | 40 | 32 | 33 | 24 | 34 | Innocent | Independence and Fulfillment |
| 9 | Control | 34 | 30 | 46 | 41 | 34 | Ruler | Stability and control |
| 10 | Pleasure | 29 | 39 | 20 | 34 | 33 | Lover | Stability and control |

Table IX.

Amazon – the ten most mentioned words

Table X.

Amazon – associated words

| | Portugal (%) | Brazil (%) | Peru (%) | Colombia (%) | Total (%) |
|------------------------------|--------------|------------|----------|--------------|-----------|
| Stability and control | | 32 | 36 | 41 | 40 |
| Independence and fulfillment | | 42 | 41 | 41 | 40 |
| Belonging and enjoyment | | 26 | 24 | 18 | 19 |

clusters, of the chosen archetypes. As shown in Figure 5, there is a predominance of word associations regarding the Independence and Fulfillment cluster (as indicated in the literature review), followed by the Stability and Control cluster, whereas in the case of sentences, there is some emphasis on the Risk and Mastery cluster.

A χ^2 test led to the conclusion of interdependence between the Sage archetype (p -value = 0.001) and the Creator archetype (p -value = 0.001) in the countries. When we analyzed the three South American countries, we got p -values from 0.04 for Sage and 0.343 for Creator (see Table XI). For both archetypes, we noticed independence from gender observations (all p -values registered values above 0.005).

We concluded that Amazon closely relates to the Sage archetype, especially in South American countries. However, no alignment exists regarding consumers' perceptions in the four countries, probably due to different insights about the brand value or communication strategy.

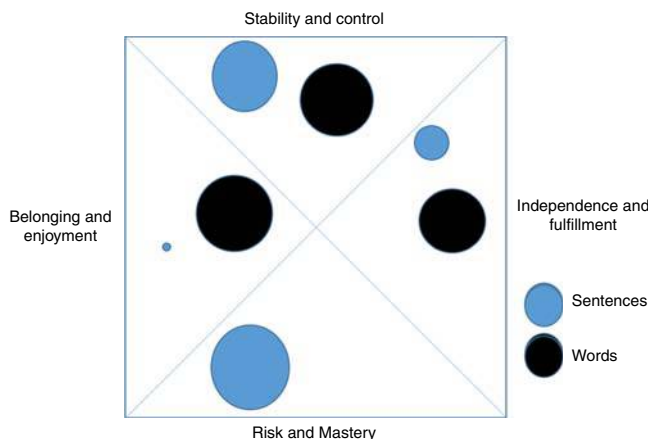


Figure 5.

Scatter diagram – Amazon

Discussion and conclusions

The extensive literature review highlighted the importance of customers' perceptions, interactions and experiences, and their consequences regarding sensorial, affective and cognitive relations with a specific brand. In this context, brand managers must focus on developing and monitoring an appropriate brand identity framework, managing customers' brand perceptions, especially the ones related to their identity and personality, across countries and cultures. Brand personality can be achieved through a platform of archetypes, which was developed by Swiss psychologist Carl Jung in the 1940s, and applied to brand management by Mark and Pearson (2001).

The overall analysis of consumers' associations relating to Apple, Facebook and Amazon brands supports the conclusion that there is a proximity between the associations observed in the literature and those of consumers of different countries about these three brands. This proximity is much more relevant in the case of clusters, as shown in Table XII.

We also showed that the consistency of results in the analyzed brands is significantly higher for word associations – that is, archetypes are more similar –, than in the sentences which Mark and Pearson (2001) used to characterize the different archetypes. We found the biggest differences in Facebook and Amazon brands, while for Apple the consistence of perceptions is significant (see Table XII).

These three brands are very recent and have a global approach or at least important global elements in their marketing strategy. Moreover, most of these brands do not have a direct presence (offices) in some of the chosen markets (except in Brazil, for some of them). The centralized and global approach may lead to a less accurate monitoring of local customers' brand perceptions, due to different cultural and value traits, consumer behavior patterns, brand experiences and social influences (social groups, social networks, word of mouth).

| | PT BR CO PE 4 countries | BR CO PE 3 countries | PT BR 2 countries | Words global archetype share (%) |
|-------------|----------------------------|-------------------------|----------------------|----------------------------------|
| Regular guy | <i>0.352</i> | <i>0.294</i> | <i>0.845</i> | 19 |
| Creator | 0.001 | <i>0.340</i> | 0.000 | 27 |
| Sage | 0.001 | <i>0.040</i> | 0.000 | 41 |
| Jester | 0.000 | 0.000 | <i>0.181</i> | 13 |
| Ruler | <i>0.352</i> | <i>0.074</i> | <i>0.824</i> | 25 |
| Caregiver | <i>0.171</i> | <i>0.204</i> | <i>0.926</i> | 28 |
| Explorer | <i>0.134</i> | <i>0.057</i> | <i>0.031</i> | 24 |
| Lover | <i>0.033</i> | <i>0.024</i> | <i>0.524</i> | 13 |
| Innocent | <i>0.007</i> | <i>0.324</i> | <i>0.195</i> | 22 |

Note: The significance level used for italic values was 0.05

Table XI.
Amazon – χ^2 test
in the countries and
clusters of countries –
three words

| | Literature review | | Words (2 or more words) | | Sentences | |
|----------|-------------------|------------------------------|-----------------------------------|--------------------------------|--------------------------------|--|
| | Archetypes | Cluster | Archetypes | Cluster | Archetypes | Cluster |
| Apple | Creator | Stability and Control | Creator (89%) Sage (63%) | Stability and Control | Creator(61%) Ruler (8%) | Stability and Control |
| Facebook | Regular guy | Belonging and Enjoyment | Jester (64%) Regular guy (41%) | Belonging and Enjoyment (Both) | Innocent (27%) Jester (23%) | Independence and Fulfillment and Belonging and Enjoyment |
| Amazon | Explorer | Independence and Fulfillment | Sage (61%) Creator (36%) | Independence and Fulfillment | Caregiver (32%) Hero (26%) | Stability and Control and Risk and Mastery |

Table XII.
Brands and archetypes –
literature review
and empirical study

Although global brands have a global strategy and positioning, they can foster consumers' experiences and expectations locally. For example, in South American countries, technological products (Apple) are very exclusive and expensive, due to local taxes and lower average salaries. Companies' portfolios may vary across countries, and so do the perceptions of consumers: in some markets, Amazon mostly sells books and technology, but in others, they also sell new products and services, as FMCG, Convenience Stores (AmazonGo), and even new categories, as Amazon Alexa. In addition, social networks, such as Facebook, may offer different uses, according to specific cultural items, such as indulgence.

In our research – and aligned with Interbrand Report – we concluded that the three brands are very relevant in these countries: they all have a high level of brand awareness and brand associations. We also found that consumers' perceptions differ substantially, at least for the two most recent brands: Facebook and Amazon. The reason for these differences relates to the specific local usage patterns and motivations, cultural and social issues, and possibly a lack of marketing research on specific programs for each country. The consolidation of perceptions can be a slow process, unless there is a focus of brand owners on subjects related to the perceptions of brand personality in these countries.

By comparing our results with the literature, we noticed a clear coherence of the Apple brand in all countries (Creator Archetype); as for Facebook, literature places it into the Regular Guy archetype, but our results showed a prior allocation in the Jester, followed by the Regular Guy (both archetypes belongs to Independence and Fulfillment cluster). In the case of Amazon, literature allocates the brand in the Explorer archetype, and empirical results placed it in Sage (both archetypes belong to the Independence and Fulfillment cluster). For all brands, the χ^2 test did not show significant differences in the results of the four countries. We also noticed that the classification of brands by words and sentences is homogeneous, given the χ^2 test results and the "word scores" in Tables III, VI and IX. Respondents' acceptance of the words is a fact, observed by the high number of fully answered questionnaires, in all countries.

The study has a significant theoretical contribution, mainly about the importance of using multiple variables for each dimension in order to perform a more accurate analysis – instead of a single sentence –, for measuring consumers' perceptions of brand archetypes. This conclusion matches the concepts of Hair *et al.* (2009) toward a more accurate analysis and the possibility to use exploratory and confirmatory factor analysis. To develop and test a list of words that characterize each archetype is another significant theoretical contribution to the study of brand archetypes. The majority of related studies focus on intended brand archetype (from the perspective of the brand manager), while ours deals with customers' perceptions regarding major global brands in distinct countries. The differences found in consumers' results prove the importance of this methodology.

This study has also a significant practical contribution. Marketing managers must carefully analyze the existence of such different costumers' perceptions regarding brand archetype. We provide a tool for monitoring brand performance, in domestic and international markets, through the application of surveys and other research tools.

Implications for academics, brand managers and future research

The theory of brand archetypes describes the value of implementing a specific brand personality approach to brands. The model suggests a monitoring system of consumers' perceptions of brand archetypes in various countries. In fact, from literature review, we conclude that this area was not appropriately studied, especially regarding global brands and international comparisons.

We tested the methodology developed by Mark and Pearson (2001), and we extended its scope in order to include the observed variables along with the proposed sentences; hence, we carried out a deeper measurement of consumers' perceptions to include local attributes.

Most of the research on brand archetypes is based on semiotic and content analysis of the brand communication (the sender's perspective.). In this study, we measured consumers' perceptions of brand archetypes in different countries, affected by all brand communication, experimentation and contact with other consumers, and through cultural, competitive and personal aspects, which are most relevant under the impact of social networks and brand storytelling (word of mouth). This research is the first step of a larger process that focuses on the development of better branding tools, that may include brands from different size industries, in different locations, with different cultural approaches.

For future research, we suggest applying other methodological alternatives for cultural and industrial diversification. This might bring more knowledge about the brand personality component and better methodologies and tools for academics and marketers.

From a methodology standpoint, future research studies should use sophisticated quantitative methods with a numerical scale (Likert-type scales). This would allow a stronger data analysis with exploratory and confirmatory tests and scale validation. Similarly, researchers may link this issue to a deeper perspective of global branding systems, thus providing better understanding and monitoring systems.

By knowing consumers' perceptions of individual brands in different countries, managers may create more sophisticated or effective marketing strategies for their brands. They could make decisions regarding their brand personality traits, according to the similarities between countries and their specifications. Monitoring consumers' associations related to brand personality traits might help in the evaluation of marketing and brand strategies and their local and global performance.

Frequently, companies do not use a brand personality systematic methodology to allocate their brands to these archetypal brand identity components, which is critical for establishing emotional associations of consumers with a brand. An archetype can be an appropriate choice in many situations. In fact, this research shows how consumers' perceptions vary across countries, even for top brands, and how important it is to monitor them.

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