THE BRAND, CULTURE & STAKEHOLDER-BASED BRAND MANAGEMENT PHENOMENON: AN INTERNATIONAL DELPHI STUDY

A thesis submitted for the degree of Doctor of Philosophy

By

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Declaration

I certify that this thesis has not been accepted in substance for any degree, and is not under submission for any degree or qualification - other than that of Doctor of Philosophy, studied and completed at Brunel University. I also declare that this work is the result of my own investigations, except where identified by references; and that I have not plagiarised the work of others.

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Abstract

Most recently in academic literature, over the past decade, it has been observed that the cultural approach to brand management represents a new school of thought. This has emerged from relational and community based brand perspectives: which chart the rising role, significance and influence in brand management of connected and savvy consumers.

Furthermore, the researcher has identified that economic migrancy; the increase in multi-racial and multicultural relations, evident in childbirth; urbanism and urbanization; Globalization; conspicuous branded consumption; and Web2.0 continue to drive new methods and channels for information exchanges, collaboration and societal understanding. These in turn are shaping and changing the way in which branding, management and consumption are being understood and practiced. Brands have gravitated towards a position of offering individual and societal meaning. In doing so they have become cultural artefacts and language shapers. In tandem the conceptual argument for a brand being understood and used as a 'human' has grown in prominence. Collectively, these represent a global cultural phenomenon where the management of brands appears to be a cultural, diffused and self-defined practice.

The purpose of this study was to examine this identified phenomenon in greater detail, from a brand management perspective. The aim was to investigate the nature of the relationship between culture and brands – to the benefit of brand managers.

The method of qualitative investigation elicited iterated views from an international panel of academics and practitioners - in the form of a 16 month Expert Delphi Study. Through the Delphi process, they were encouraged to arrive at a consensus of opinions and understanding.

Findings of this doctoral study suggest that culture and brands share strong relationship bonds, brought into existence by human desires. Equally, brands and culture both have the ability to influence each other. Furthermore, the successful management of brands requires a cultural approach, which mediates dynamic and complex networks of brand stakeholder relations. It was concluded that the understandings of brands, culture and management have to take into account: context, space and time – as porous boundaries of transience and transcendence.

A new, *grounded* theoretical framework for brand management was developed - which took its inspiration from Aristotle's *Praedicamenta.* In addition, alternative criteria for collecting and analysing biographical data were proposed.

Keywords

Acknowledgements

Dedications

Finally, this thesis is dedicated to:
- ❖ My Father, Thomas Wilson
- ❖ My Mother Careen Wilson and Grandmother Dr Olive Wilson, who are no longer with us
- ❖ My Wife Homa and my baby Daughter Hanifa Sakura Careen – *my ray of sunshine* and *my little moonbeam.*

Without you, I have no form or shadow.

Also, I would like to mention:
- o My Brother, Dr Ewan Wilson
- o 'The Altaf' siblings: Deeja-Jaan (Khadijah), Kasumi-chan (Kalsoom), Zaki-kun (Zakariya), The one and only Muzzamil, and My Little Aqsa-jaan
- o Abdullah Al Saber

For all of you mentioned: your love, support, prayers and nourishment have shone a light in the day and the night - which has kept me young, fit, happy and focused in the oceans, valleys and mountaintops of scholarship.

Quotations

"Others can show you the way, but you must walk it yourself"
(Hassan Massoudy)

子曰：學而不思則罔，思而不學則殆。

The Master said,
"Learning without thought is labour lost;
thought without learning is perilous"
(Confucian Analects, Chapter XV)

"The man who views the world at 50 the same as he did at 20
has wasted 30 years of his life"
(Muhammad Ali)

"If they can make penicillin out of mouldy bread,
they can sure make something out of you"
(Muhammad Ali)

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Chapter One: Introduction

Thesis overview: How the journey started, where it went, and where it finished

Chapter 1: Introduction

1.1 Background to the field of study

Brand management falls within the discipline of marketing - and branding has been observed as becoming an increasingly conspicuous and commercially critical element. Kotler (2000) frames marketing as:

> *"a societal process by which individuals and groups obtain what they need and want through creating, offering and freely exchanging products and services of value with others"* (p.8).

It can therefore be assumed that marketing, whether understood, termed, or not: is implicitly, explicitly and tacitly linked to humanity. In addition, the construct presented by Kotler considers the identification of consumer and marketer perspectives on polar scales. In turn it follows that these general principles are also of concern specifically within branding. However, in creating a polar scale, it can be argued that in between them will exist blended roles and realities.

With the advent of technological advances and convergence, and a diffusion of innovations: postmodern marketing is encountering exponential changes. Web2.0, social media, user generated content, consumer commerce, branded individuals, avatars and a global market have contributed to increased information exchanges and social networks – which have lead to an increase in competition for hearts, minds and revenue generation. A further by-product of these is that consumers are more informed, discerning and demanding: and therefore the pull to enter marketer-consumer exchanges which cater for customised consumer-initiated offerings has increased. What remains open for debate however, is how much power and control should be sacrificed to consumers; and how long should strategic time-horizons be forecast.

In tandem: economic migrancy; the increase in multi-racial and multicultural relations, evident in childbirth; and urbanism and urbanization are reshaping societal and cultural landscapes. Therefore as marketing is a part of human living, which touches the lives of people increasingly looking to embrace degrees of civilised urban experience, it follows that this is regardless of definitions or context, culture.

More specifically within branding, with the growth of brand conspicuousness and consumption: lesser branded producers and manufacturers further down the value chain have seen their margins squeezed. So much so, that upstream some organisations have favoured approaches which see them claiming and branding commodities produced by others. By doing so, incremental brand gains offer more than those through producing the commodity in its entirety. And so, creating a brand and a 'conceptual' offering, before even producing the item - in order to generate demand, appears to be the trend.

These in turn are shaping and changing the way in which branding, management and consumption are being understood and practiced. Brands have gravitated towards a position of offering individual and societal meaning. In doing so they have become cultural artefacts and language shapers. Also, the conceptual argument for a brand being understood and used as a 'human' has grown in prominence. Most recently in academic literature, over the past decade, it has been observed that the cultural approach to brand management represents a new school of thought.

Collectively, these observations represent a global cultural phenomenon where the management of brands appears to be a cultural, diffused and self-defined practice.

The result of this is fivefold:

1. Brand strength heavily influences business and management practices
2. The relationship between marketers and consumers is becoming more collaborative, away from polar extremes
3. Brands are governing more evaluative calculations and exchanges – both inside and outside of commerce
4. Perceived value is becoming more and more intangible and subjective
5. And therefore 'profit' calculations have to consider both marketer and consumer perspectives, on what this actually means.

With these in mind: long-term relationship horizons over transactional approaches, reciprocity and delayed gratification are playing bigger parts[1]. These are typified by brand and service premiums, which can be viewed as conspicuous consumption. Examples of this can be seen with: the branding of generic commodities, such as fruits and drugs; and the overt labelling of clothing. Furthermore, such goods tend to offer augmented features, like free information lifestyle guides - which look to increase the number of 'moments of truth', touch points, and conversations concerning surrounding areas of interest.

With such long time-horizons through the legacy of information which remains in the public domain, juxtaposed with instant messaging and hyper-communication, managing reputations is paramount – and reputations which can withstand future shifting landscapes and reframing. This in turn has brought the role of reputation management and corporate social responsibility to the forefront of branding.

Comparably, the launch of brand extensions and stretches has increased. Most clearly, this can be observed with celebrities levering on their brand equity to produce commodities. Anecdotally, within the past five years, marketing textbooks have started to include case examples of music recording artists, such as Jay-Z, P.Diddy, and J-Lo - who have launched product lines in fashion and fragrance. They are now being classified as brands in their own right, when previously more traditional definitions of branding sought to only classify associated inanimate products and services.

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[1] An example can be seen when observing the practices of top-flight English Football Premiership clubs, who are global brands with a raft of brand extensions – such as cafes in India (Ahmed, 2009). On 28th August 2011, two North London teams, Arsenal and Tottenham Hotspur, played Manchester United [reigning 2010-11 Premiership champions] and Manchester City [reigning 2010-11 FA Cup champions] respectively. Manchester United beat Arsenal 8-2, and Manchester City beat Tottenham Hotspur 5-1. Arsenal contacted those fans that travelled to the game, offering a free ticket to a future away match (BBC News, 2011). In this example, several observations have been made. Whist on paper the Arsenal defeat was greater than that of Tottenham's, statistical arguments could also be made for Tottenham's defeat being of more significance - as they had a home advantage, and in line with the added perceived value of away goals and ratio of goals scored, the gap if their defeat is greater. However, only Arsenal offered compensation to their fans. This case gives insight into how brands view their consumers and stakeholders; that long-term horizons are crucial; and that even when a product and service offering has been delivered in theory, in practice this may not in fact be enough. For a team cannot guarantee 'success' - however, for Arsenal fans there are stakeholder expectations, which drive such desires and strong psychological contracts have been forged. Therefore, they were willing to go further in protecting these more intangible and experiential brand relationships.

Therefore, the overarching observation is that brands have risen into becoming integral components of acculturation within modern society. The resulting argument points towards brands and culture sharing intricate causal relationships, which necessitate their management within business.

1.2 Motivation for research

The primary motivation for researching this topic is that whilst adages exist which suggest brands and culture are both important and significant to businesses and consumers, there are still gaps in knowledge and understanding. For the argument is posed that if both branding and culture are so crucial, how much is known about them, which would allow for their successful management and allow for the ability to predict and execute critical success?

Furthermore, there is evidence to suggest that their significance goes beyond previous claims, where the researcher considers whether brands and culture are actually a facet of human existence – meaning that whilst humans exist, there will always be brands and culture.

Holt (2003) asserts that, *"Branding has become one of the most important aspects of business strategy. Yet it is also one of the most misunderstood"* (p.1). It can be inferred from the body of published work that Holt has produced in branding and consumer culture, and the amount of time that he devotes to culture in a modern context: that the intersection with brands and culture and how they are engineered by managers is a key area of misunderstanding requiring more investigation. Holt goes onto suggest that the conceptual understanding of brands has to borrow from the disciplines of anthropology, history, psychology and sociology, in order to understand them as *cultural artefacts.* However, in the face of attempting to understand brands from such diverse range of subject disciplines, there appear to remain gaps in understanding. One that the researcher reflects upon in particular, and in the case of Holt's work, is what is meant by culture and on what level. Holt (2003) cites Klein's (2001) book *No Logo* as evidence of branding being used "in an imperialist manner, feeding on consumers' base desires while ignoring issues of social welfare" (p.12). Schroeder (2010) suggests that

"greater awareness of the associations between the traditions and conventions of culture and the production and consumption of brands helps to position and understand branding as a global representational system" (p.125).

Again, Schroeder refers to the rise of the *No Logo* anti-branding movements embodied in Kelin's (2001) work. Schroeder also observes that consumer culture is critical to understanding brands, with brands becoming a contested managerial, academic, and cultural arena. From this point, he argues for brand researchers requiring more new tools to develop and understand culture, ideology, and politics, in conjunction with more typical concepts, which have been established, such as: equity, strategy, and value. When this is cross-referenced with more recent observations of consumer-led branding, user-generated content and brand-centric social networking, reported by Jacobs (2011) in the *Financial Times,* it is likely that without further understanding in the field of culture linked to branding, brand managers may embark on future paths which impact adversely on their brands and strategies.

Picking up on Schroeder's (2010) point of brands being contested by managers, academics and consumers: the researcher considered critical realism and conceptual theory building; and whether academics and practitioners approach the field in the same way. Baker and Holt (2004), Brennan (2004), Brennan and Ankers (2004), Lilien (2011) suggest that there exists an academic-practitioner divide. Jaworski (2011) calls for the need to advise academics and practitioners in tandem, especially on managerial relevance - where he finds that despite decades of debate, surprisingly little work has been done on the nature of the concept itself. In light of these observations, the researcher felt motivated to investigate this point further and considered how findings could be presented in such a way that they would be of relevance to both academics and practitioners.

The researcher has benefitted from a broad based education in the sciences and arts, and started practicing marketing communications in 1993. Making sense of human existence from varied perspectives has always been a passion. The researcher has attempted to derive meaning and understanding, drawing from: culture - manifest in ancient history, art, contemporary culture, ethnicity, language, literature, music, religion and sport; and the life sciences. Since then he has reflected upon his varied experiences, considering what areas have been of

most interest to him and marketing peers, and where he could make valid contributions to new knowledge through doctoral studies.

In response to these, reflected in the summary observations stated, it is argued that Brands, Culture and their Management are dominant factors within postmodern marketing execution and consumption. Building on this, the researcher considered whether a unifying factor and method of understanding can be arrived at through mapping out the various associated brand stakeholders. Furthermore, with so many rapid changes, is there an argument for reviewing core branding and management principles.

Riezebos (2003) suggests that brands and branding today have their roots in Ancient Greek and Roman times. This adds further credence to the significance of Ancient Greek philosophy and civilisation in this field, and why therefore within this thesis it should remains a central part of background, focal and data theory. Riezebos's observations also argue the roots of brands therefore predate notions that the advent of branding is a by-product of post 1870 industrialisation.

In its broadest sense, as branding falls under the umbrella of marketing, when considering. Bartels (1962) suggestions that marketing 'thought' can be assessed, according to the following philosophical dimensions:

1. Intellectual: drawing from scientific and philosophical perspectives
2. Temporal: how it has evolved over time
3. Spatial: where it exists in connection with other disciplines
4. Interdisciplinary: its correlation with other social sciences
5. Ethical: principled field and form of conduct
6. Spiritual: the link with humans beyond material and physical things

It is argued that these also pertain specifically to branding and furthermore is hypothesised that it can be extended to culture. More simply, Lamb, Hair and McDaniel (1992) state that marketing is, "(1) a philosophy, an attitude, a perspective, or a management orientation that stresses the importance of customer satisfaction, and (2) a set of activities used to implement this philosophy (p.314). Varadarajan (1992) impresses the importance of marketing being an applied discipline, which appraises real world problems and phenomena. From this, he suggests that sustained competitive advantage can be gained through focussing strategically on:

- Marketing skills
- Market Knowledge
- Customer orientation, service and relations
- Brand names and images
- Unique competences

In support of Varadarajan (1992), Myers (1979) views marketing as a professional discipline, rather than an academic one, therefore the role of academic research and resulting knowledge is to improve marketing practice and decision-making.

Definitions and approaches to understanding brands will be discussed in more detail later, but at this stage it is worth reflecting upon the observations above – because they have helped to shape the research agenda and scope of the literature study. As branding is an applied science, which straddles several subject fields, the body of knowledge appears to exist: in varying and wide-ranging sources; and necessitates an appraisal of real-world practitioner perspectives.

1.3 Research context

The research context is one that balanced the requirements of doctoral study, such as research within a specific timeframe; and the pursuit of new knowledge linked to real-world and real-time events – in order to preserve its relevance as an applied science of value to academics and practitioners. The researcher is a full-time Senior Lecturer in marketing and management, and an academic journal Editor - hailing from a marketing communications and media practitioner background. Prior to this, the researcher graduated with a Master of Business Administration; and a Bachelor of Science degree in chemistry, with a focus on the life sciences. Therefore an additional underlying research context lay with the researcher looking to draw from and harmonise these varied experiences – and in doing so attempting to cast a new perspective on an emerging phenomenon.

Following these points, the researcher provides the following explanation into the link between this phrase, his conceptual argument and what communication is being attempted:

- Brands, Culture and Brand Management are three key points
- Attempts are made to link and join them together, where it is inferred there is a current gap or gaps

- Inductive approaches are employed when attempting to link networks
- Meaning and Branding
- It is inferred that in examining Brands, Culture and Brand Management, there may be positive, negative and neutral connectors and transmitters
- Metaphors and allegories are an important element of this thesis

1.4 Aims, scope and objectives

As has been stated: whilst the observation that brands and culture are linked in some way, might appear self evident and common sense; what still remains unclear is more detailed understanding. There remains an imperative for gaining more understanding surrounding concepts such as, amongst others: what and where these links between brands and culture exits; what effects do they have on each other; which, if any, controls the other – are brands governed by culture, or could the reverse be said; are these links universal across product categories, industries, geographic locations, socio-economic groups and different national cultures; and if understood conceptually, how can this translate into engineering and managing such processes?

Therefore purpose of this study was to examine this identified phenomenon in greater detail, from a brand management perspective. The aim was to investigate the nature of the relationship between culture and brands and to see if there are any patterns, which can be identified – to the benefit of brand managers. From this, the final objective was to craft a grounded brand management theoretical framework, which built upon a body of knowledge and provided updated, emergent and new erudite scholarship. It naturally followed therefore that the researcher looked to gather the opinion of expert brand practitioners, with cross-cultural and international experience. Furthermore, with the review of academic theories and literature, the researcher decided that also eliciting the views of academics was a prudent and worthwhile exercise.

1.5 Research methodology

Through adopting Grounded Theory methods and inviting participants in the research study to comment on identified themes, through iteration using an Expert Delphi study construct, it is argued that the significance of the body of

literature is both supported and strengthened. In-keeping with grounded theory methods, the researcher has been driven towards capturing generative and emergent theoretical frameworks, whilst building subject expertise through continuous literature searches. Therefore, rather than being a linear process, significant searches continued throughout doctoral study, also after data collection from participants and subsequent analysis – which enabled the researcher to respond to expert panellists' comments and further identified gaps. To this end, literature searches followed a hermeneutic cycle of discovery, which places a precedent on apparent and absent knowledge, logical arguments, syllogisms and phenomena. Having taken into consideration the views of Bartels (1962), Varadarajan (1992), and Myers (1979) in support of this approach, a key assertion is that the role of an applied science 'real-world' marketing researcher is to present erudition over historical chronologies and statistical patterns.

1.6 The scope of the study and key assumptions

The scope of the study was to research the identified phenomenon within the fixed period associated with doctoral study. In addition, it was assumed that research would be undertaken with limited financial resources. With these in mind and when also considering the researcher as an integral component - shaping the scope and assumptions of the study: it was considered that a significant factor towards the scope, reach and generalizability of findings lay in the ability to attract suitable and willing participants, in a sufficient volume. The underlying assumption was that this was possible, based upon the skills and competences of the researcher.

1.7 Organisation of the thesis

Figure 1 outlines the organization and structure of the thesis, highlighting the fact that the thesis has been structure in such a way that the chapters follow a logical and sequential process, with cross mapping. Chapters are arranged in the form of a conceptual matrix, in order to increase methodological strength and rigour of the process, through triangulation. Furthermore, it is judged that such an approach increases the linkages and transitions between chapters.
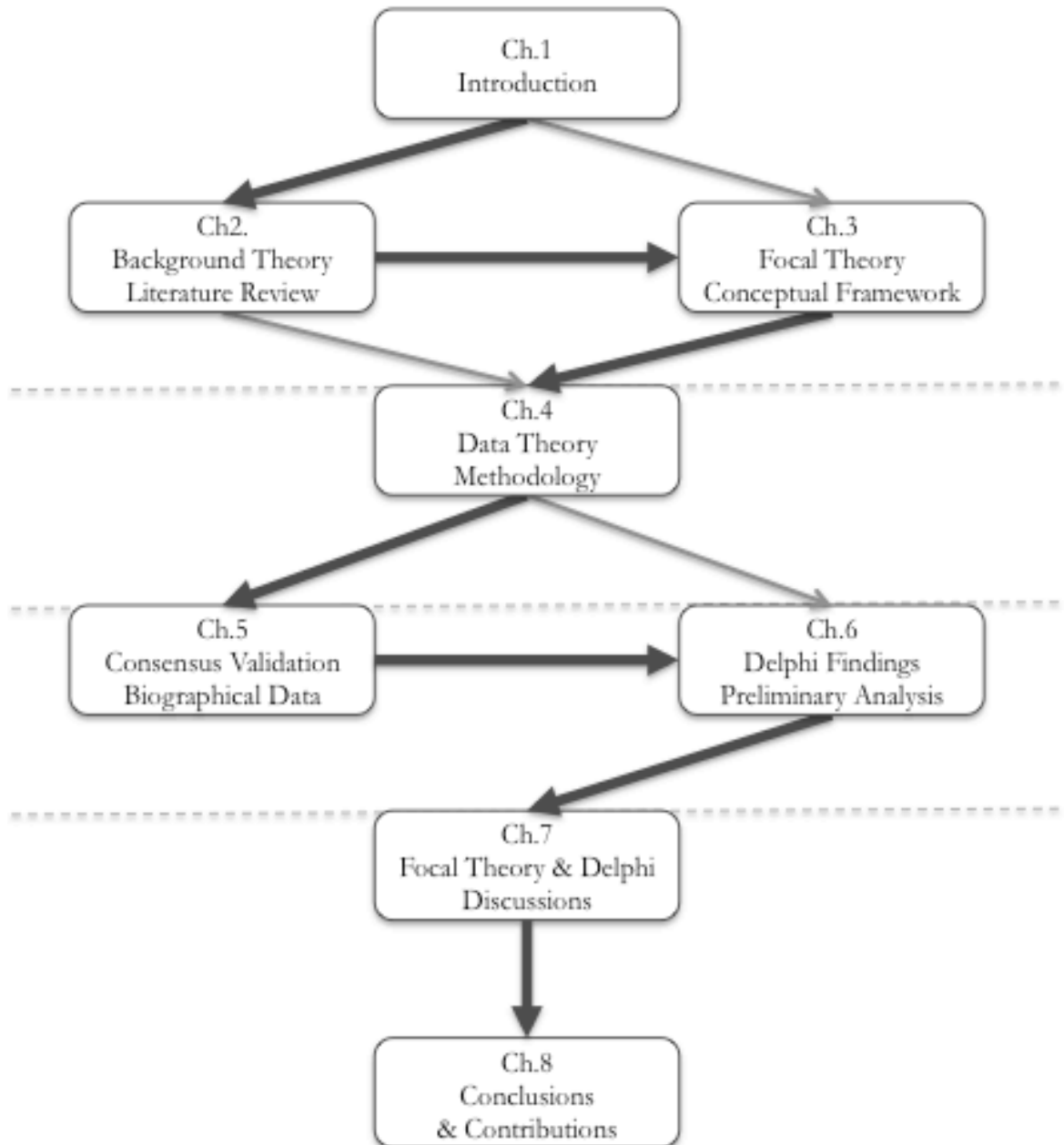
Figure 1 Organisation of the thesis

More specifically, the thesis is structured according to the following chapters:

Chapter One: is grounded in understanding the body of existing knowledge in the field and identifying what is less known – through thematic regrouping and conceptual investigation. To this end, what is presented is the background to the field of study, articulating why there is an argument for investigating what has been identified as a both a phenomenon and problem necessitating further

structured research. In further support, the chapter discusses from what perspective and in what way the research study will be conducted.

Chapter Two: presents the findings of a background study, in the form of a critical literature review. Themes and groupings of brand management perspectives and approaches are reviewed and presented, with the aim of updating existing knowledge in the field, as a stand alone dissertation. Also, in response to the observations discussed in Chapter One: relevant literature on culture, from business and anthropological perspectives; and stakeholder analysis were mapped to brand management theory and practice. From these, a sound basis for making preliminary conclusions was judged to have been arrived at, which in turn guided thinking towards what primary data collection, from where and how, was most germane to the research exercise.

Chapter Three: Delves deeper into the preliminary findings of the background theory and identified gaps - in order to create a focal theoretical framework and thesis, which in principle could be tested. Here, philosophy guides practice and investigation. Driven by the thesis, which sought to remedy identified gaps, research questions were proposed in order to probe and test the identified phenomenon, its causes, driving factors, nature, motives, context, scope and consequences. Questions were both specific to the research problem and also reflective of wider factors held to be of relevance and with the potential to contribute further understanding.

Chapter Four: outlines the philosophical approach and research methods by which primary data collection could be undertaken and analysed. The researcher considers methods by which new knowledge and understanding could be unearthed and how, within identified constraints. It was decided that under the conditions of doctoral study, a grounded theory approach to data collection manifest in the form of an Expert Delphi Study was the most appropriate method. Furthermore, it championed the concept that judgements and future predictions concerning a phenomenon are largely commenting on the unknown – therefore the collective inductive-deductive judgements of a significant number of experts has strong merits.

Chapter Five: calculates the validity and generalizability of the data collected, in connection with the research problem. Data was analysed according to quantifiable: subject-held consensus; content and conceptual saturation; and subject biographical data.

Chapter Six: presents new empirical data - collected with the purpose of understanding the identified phenomenon in more detail, and moving towards filling in those knowledge gaps, which have been identified in the background and focal theory. Key preliminary findings unearthed from the primary data collected in the Delphi study were analysed and presenting with discussions - which culminated in a definitive phenomenological explanation supporting the research problem. This was achieved through a structured, reflexive, reflective and reductive hermeneutical cycle of investigation.

Chapter Seven: maps the triangulated findings of the Delphi study to the research questions and conceptual focal theory framework, within the context of the emergent and generative background and focal theories previously presented in Chapter Three. In turn, through syllogisms, the final and refined focal theory and thesis is grounded and defended.

Here, the thesis is tested and defended against the established philosophical underpinnings; along with the opinions of professional experts, who have made judgments specific to the research problem and identified phenomenon.

Chapter Eight: finally signals the conclusion of the doctoral study. Critical summaries and reflective conclusions bringing together: background, focal and data theory; in tandem with significant empirical research findings. Based upon the empirical data and research findings: implications of the doctoral study's existence are outlined, whilst also considering its limitations and potential future research perspectives and endeavours. Collectively, these form the basis for outlining the researcher's contributions to knowledge.

The broad purpose, scope, methods and structure of the doctoral thesis have been outlined – in response to an observed and identified cultural brand phenomenon, which raises questions as to its true nature, and how brand managers do, can and should operated in order to fulfil their strategic obligations.

The following chapters present the continuation and conclusion of the doctoral journey. Chapter 2 will now present background theory findings, in the form of a critical literature review.

Chapter Two: Background Theory

Critical thematic grouping and taxonomy of existing knowledge

Chapter 2: Background Theory - Literature Review

2.1. Introduction

The following chapter presents background theory in the form of a literature review - in order to provide a platform for the focal theory and the precise research issue outlined in Chapter 3. The literature review presents a critique of existing brand management taxonomies approaches and perspectives, contributing to the body of knowledge by re-evaluating the role of culture and how it affects brand thought, management practice and consumption.

The first stage of analysis began with establishing a lens of investigation, in order to map key identified literature and more extensive interconnected and supportive papers, in the form of a critical review. Following this, a calling of the lens was undertaken, which culminated in background theory presenting the need for an extension and refinement of the lens, creating a new school of thought. Further considerations were given to literature patterns and trends - as to whether findings followed a linear progression, or other modes, such as see-saws, cycles, polarisations, or dichotomies. This process of evaluation was used to determine where a body of knowledge exists and where there are gaps, or paucities of understanding.

Searches suggest that it is clear that the explicit linking of culture with brands and brand management is relatively new - emerging in the past ten years. Furthermore, the role of the consumer and the expansion in interpretation of consumer definitions is considered: also to include employees, and active corporate and non-corporate stakeholders - as consumers of brand messages. For these reasons, brand literature searches have been expanded to include conceptual arguments presented in supporting disciplines. This decision was taken as a part of a second hermeneutic cycle of investigation, responding to gaps

in erudition offered particularly concerning culture, as a new core variable within branding.

2.2 Review of brand definitions

Branding has initially been defined as being a non-generic named creation positioned within an economic construct and from this it follows that stakeholders would in turn engage for economic gains, ratifying a brand's continued existence. In line with this thinking, the American Marketing Association (1960) defines a brand as being:

> *"A name, term, sign, symbol, or design, or combination of them which is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors".*

The American Marketing Association produces the *Journal of Marketing,* and the *Journal of Marketing Research* [carrying the highest 4* ranking, according to the Association of Business Schools (ABS) guide to academic journal quality]; and the *Journal of International Marketing,* and the *Journal of Public Policy Marketing* [carrying 3* ranking, according to the ABS guide to academic journal quality]. From this is taken that their definition is the most established, widely used and understood. As will be discussed later, key academics in the field of branding: Aaker and Keller (1990), Keller (1993), and Aaker (1997), through publishing in the *Journal of Marketing* have used this definition as a starting point to develop further scholarship concerning brand management.

In tandem, the *Journal of Consumer Research* [carrying 4* ranking, according to the ABS guide to academic journal quality, has published work from Fournier (1998a), Holt (2002a), and Keller (2003a) – which signals the significance and rise of consumer-based perspectives, which will also be discussed in more detail later. Building on this, a key focus of the research study is to explore the concept, relevance and application of brand definitions.

Some thirty years on, little has changed in what appears to be an enshrined definition as to what a brand is:

> *"A successful brand is a name, symbol, design, or some combination of the three, which identifies the 'product' of a particular organization as having a sustainable differential advantage"* (Doyle, 1989 p.77).

As an extension of classical economic arguments the assumption is that stakeholders have predetermined goals - which they seek to attain for the least 'cost'. This view has been championed by Levitt (1983), who also suggests this is a driving factor for globalisation and a convergence towards consumer homogeneity. de Mooij (2011) argues the contrary, which is taken to be an indication of commercial and technological advancements that are driving new patterns of behaviour. The researcher considers whether this is also an indicator of prevailing gaps concerning the understanding of the human psyche. As will be discussed in more detail later, de Mooij (2011) also observes than brands and humans are in fact becoming more cultural and local in the face of globalisation, which highlights a duality in this phenomenon. This led the researcher to examine whether these new patterns led to wealth creation, rather than being just a zero-sum game, which tests concepts of exchange and linearity.

A more recent definition from Brand Channel (2009) defines brands as:

> *"a mixture of attributes, tangible and intangible, symbolised in a trademark, which, if managed properly, creates value and influence."*

Within this definition, brand components have been made more ambiguous, whilst a brand now also has to demonstrate a legally defensible position. It is argued that for globalised brands, some of whom enjoy this status de facto through the Internet, establishing universal laws that can be upheld over the long-term across territories and industries[1] remains unclear. In addition, debates surrounding the idea of value split opinions. As sellers and organisations are not explicitly mentioned in more recent definitions, there is an inference that value is subject to parties outside of marketing functions and organisations - namely consumers. Furthermore, brands appear to gain ratification of their status and strength through a named and perceived ability to influence.

Brand Channel is an online resource: providing brand news, debate forums, and job vacancies; and publishing case studies and white papers from academics and practitioners. The reason for consulting its definition of a brand is threefold:

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[1] Between 1978 and 2006, *Apple Corps* (owned by the Beatles) and *Apple Inc* (formally Apple Computer) were involved in a number of legal disputes over competing trademark rights, concerning involvement in the music business. Apple Inc were eventually able to contest a ruling, having it overturned. A key defense being their continued growth in brand strength and notoriety, whilst Apple Corp's declined.

1. To cross-reference definitions, which are used by academics and practitioners
2. To examine definitions, which are revised with more frequency, in response to market factors and peer comments
3. To source a definition that is more likely used by practitioners, upon which they and academics can comment on, when participating in the doctoral study.

Levy, (1959) writes that consumers purchase things, not just based upon what they can do, but also based upon what they mean. This lead de Chernatony and McWilliam (1989) to categorise brands according to their function and representation. Therefore, brands are evaluated according to hard and soft factors, which encompass evaluative calculations, based upon rational and emotional perceptions. In addition, these calculations are not solely based on the here and now, they forecast future sustainable values and aspirations (de Chernatony, 2003).

Collectively, these support the argument that branding has been able to demonstrate and spearhead exponential economic gains, rather than being merely supportive tools. Furthermore, brands in fact afford more subjective factors such as status and value beyond money, to both buyers and sellers - and as a result can command additional premium price tags. Furthermore, instead of considering culture in situ as a discrete element of organisational or consumer practices; culture should be viewed as a unifying factor existing on different levels of abstraction.

However, upon further examination of literature, an emerging supportive or counter argument appears that dispenses with classical economic constructs - which notably is not explicit in Brand Channel's (2009) definition. The following quote encapsulates this position:

> *"Brands are used as a sort of language. Brands tell you a great deal about who you are, where you are in life, what you are and where you are going. Brand choices are as much a part of ourselves as the way we speak, the words we use, our dialect, dress, gestures and language. Brands are part of ourselves and we are part of brands"* (Lannon and Cooper, 1983, p.205).

Beyond the physical market positioning and architecture of brands, their spatial relationship in the mind of consumers is of significance - according to ownership and alignment with consumers' value systems (Ries and Trout, 1982; Marsden, 2002).

More recently, brand descriptions, thinking and terms are seen to draw from outside the subject discipline and are heavily steeped in analogies and allegories. Examples of which are the terms: *brand architecture, brand DNA, brand iconography,* and *brand memes.* These are also evidence of the fact that brand academics and practitioners seek to brand their approaches, for competitive advantage and distinction. Alternatively, it belies the fact that communicating what brands are and how they work is an arduous task - which necessitates longhand descriptive prose that is then reduced into 'snappy' concepts.

In line with these observations and as an extension of:

1. Associative network mapping of the human memory (Galton, 1880; Freud, 1924; Deese, 1965; Anderson and Bower, 1973)
2. And drawing from memetics (Zipf, 1965; Dawkins, 1976; and Marsden, 2002)

these two fields ascribe the science of culture and creativity to a process of positioning *memetics* (genes of meaning). Within this process, brands aim to offer a transparent paper trail of heritage antecedents, which both attract and guide consumers on a path of assimilation. Furthermore, brands are judged using scientific principles and are exemplars of marketing creativity. From this, a brand's essence is housed within a cultural context and sustained by stakeholders. It is these two constructs, which maintain a brand's strategic value and judged creative execution (Holt, 2002b, 2004, 2005; de Chernatony, 2001).

When considering the role of emotions in connection with positioning: brands are used by marketers, consumers, and organisations/organised groups to construct their own respective self-identities (Hooley and Saunders, 2004; Elliot and Wattanasuwan, 1998; Fournier, 1998; Solomon, 1996). Furthermore, when governed by unifying ideas, the content of a brand grows out of the cumulative memory of acts - and according to Kapferer (1992) it is brands that create anchors in our memories, which shape all future perceptions. These are borne out of an individual's desire to relate brands to themselves and their reality (Fournier, 1998). Elliot and Roach (1991) have suggested that these perceptions may be subject to distortions; which in tandem Shannon and Weaver (1949) ascribe in part to environmental 'noise' or distractions. These make locating and mapping the intentions and perceptions behind the language of branding at times elusive. Nevertheless, the importance of emotional attachment, according to Hooley,

Saunders and Piercy (2004) and Batra and Ahtola (1990) points to increased loyalty; brand preference; and the trend towards creating *unique emotion propositions*, rather than merely *unique selling propositions*.

As branding is also able to exist outside of hard business functions, they have become societal phenomena, as is argued especially over the past ten years. For example: social media is encouraging individuals to brand themselves as avatars; the convergence in technology typified by smart phones drives the classification and consumption of information with branded logos and apps; Human Resource management is embracing marketing concepts, which are in turn cross-fertilising and integrating marketing constructs – generating such terms as *internal marketing*, *employer branding* and *employee branding*; and more brands are entering contemporary vocabulary as short-hand descriptors, adjectives and verbs.

Supporting these observations and those of Lannon and Cooper (1983), more recently Keller, Apéria and Georgson (2008) suggest that anything can be branded. Furthermore, in stark contrast to Doyle (1989), Neumeier (2006) first seeks to define what a brand is *not*. Neumeier argues that a brand is not a logo or product, nor is it a corporate identity system. Rather, it is,"...a person's gut feeling about a product, service, or company" (p.2).

Neumeier's justification for this (by his own admission) hails from Platonic ideals – which are concepts shared by society to identify a specific class of things. This is not unique to ancient Greek philosophy: comparably within classical Arabic linguistics, explanations form couples – where negations precede assertions. For example, the *shahdah* (Muslim declaration of faith in Islam) is translated as: 'there are no gods worthy of worship, except the one Abrahamic God'. However, more mainstream marketing and brand definitions seldom seek to restrict through negations. Rather they appear to encourage the truncation and concision of a body of attributes and properties, which grows over time.

This emerging dichotomy of definitions in literature has been central to driving the researcher's field of study. The argument being that a body of published corroborative or conflicting definitions represent varying perspectives and lenses, which contain truth. Collectively, likelihood of a larger and more accurate truth

being arrived at is likely through a critical literature review, which investigates, synthesises and harmonises. From this, the researcher decided to appraise the role of both economics and communications, which appear to be central constructs that are creating differences of opinion. Therefore a key area of consideration was how mainstream and applicable are the more historically traditional and prescriptive definitions of brands, against more rhetorical narratives.

A summary position of these perspectives points to brands occupying distinct and meaningful positions both physically in the market place; and also in the minds of people, balancing ration and emotion. These positions de facto render brands competitive and subject to segmentation (Kotler, Wong, Saunders and Armstrong, 2005; Hooley, Saunders and Piercy, 2004; de Chernatony, 2001; Ries and Trout, 2001; Aaker, 1996; Kapferer, 1992; Keller, 1998; Doyle and Saunders, 1985). As a result, brand exemplars should be able to:

1. Deliver demonstrable factors to a greater degree, better than any other marketing element or approach
2. Achieve sufficiently unique, defensible and inimitable traits, and
3. Sustain such positions.

2.3 Sub-categorisation of branding into schools of thought

Having established the scope, reach and nub of a brand's nature, focus shifts towards the sub-categorisation and examination of approaches to managing and understanding brands in tandem. Following a taxonomy, undertaken by Heding, Knudtzen and Bjerre (2009), representative of a systematic analysis of 300+ brand management research articles and spanning the period of 1985-2006: they suggest that these various approaches can be categorise within seven groups [Table 1]:

1. Economic
2. Identity
3. Consumer-based
4. Personality
5. Relational
6. Community
7. Cultural

Through their analysis, Heding, Knudtzen and Bjerre (2009) also sought to formalise and highlight key terms, which have come into existence. They write that,

> *"These seven 'schools of thought' represent fundamentally different perceptions of the brand, the nature of the brand-consumer exchange, and how brand equity is created and managed"* (Heding, Knudtzen and Bjerre, 2009, p.3).

Heding, Knudtzen and Bjerre's (2009) book is published by Routledge, as one of their research series aimed at researchers, academics and practitioners. It was felt that the book could be used as a central piece of the doctoral study for the following reasons:

- It was blind reviewed by academics
- The book structure is not like other more conventional book approaches - which adopt a more narrative stance, or one of instructional textbook. Instead, it follows what is a critical literature review, based upon a taxonomy and subsequent typology. Such detailed commentary on brand management literature as an overview was found not to be present in one or a collection of journal papers
- The recency, timeliness and relevance of the publication
- It carries a commentary from Douglas B. Holt, whose work takes a cultural brand perspective, which is central to this doctoral study. Furthermore, as Holt's commentary is placed alongside other brand management perspectives, this allows for more successful cross-referencing
- It carries a forward from de Chernatony, and testimonials from Keller, Muniz and O'Guinn – each of whom are recognised academics in the field of consumer-centric brand management perspectives
- The authors state that purpose of the publication is to fill a gap, through providing an understanding of how the nature of brand and the idea of the consumer differs in approaches, and to offer *"in-depth insight into the opening question of almost every brand management course: 'What is a brand?'"* (p.1 and back-cover).

The researcher adopted this method of classification, as a starting point and lens of analysis. This decision was taken following preliminary desk reviews, as it is based upon terms and distinctions pregnant in the body of literature and more specifically in the titles and abstracts of the articles. This was judged to fit in with a deductive-inductive grounded theory approach to gathering and presenting background theory, which is central to the researcher's method and thesis. Further reasons for choosing this lens were that the review was undertaken within the past ten years - where it has been observed that there have been

significant phenomenological and environmental factors, which have started to raise questions concerning existing brand thinking.

Using Heding, Knudtzen and Bjerre's categories and key terms as metadata indicators and Boolean values, the researcher undertook a further exhaustive literature search and desk review. Literature was mapped to these categories, primarily according to school of thought and secondarily with consideration to year of publication [Table 2]. Year of publication was held to be secondary, based upon the argument that thinking and conceptual argument are of more significance than empirical data findings according to a timeframe – as data guides and proves focal theory, rather than the opposite.

As the decision was taken to map out literature in a taxonomy according to *approach*, rather than date, it became apparent that firstly, *thought* was in fact of more significance than time. Secondly, it indicated that whilst *approach* shares a relationship with time – rather, it is subject to fashion, instead of being a distinct negation of one thought over an over, as is more likely in hard sciences. These were the first indicators, that conceptual arguments and findings pointed towards a cyclical process.

Key texts were then selected and grouped under a further table, termed seminal texts [Table 3]. Hirschberg and Hirschberg (2009) impress the importance of "marking as you read", when studying the field (p.4). The researcher adopted this marking approach, which is also in keeping with *grounded theory* methods to gathering data and generating theory, through memoing - which will be discussed in more detail in the data theory methodology chapter.

Following this, using hermeneutical principles of problem investigation and grounded theory continuous memoing, a further literature search was undertaken. Firstly, this used the same metadata indicators and Boolean values as previously was undertaken, to gather literature post 2006. Secondly, additional searches were undertaken, expanding to the use of branding, marketing and management terms linked to culture. A final search was then undertaken examining associated sub-divisions and supporting fields to culture: anthropology, cross-culture, consumption, ethnicity, globalisation, internationalisation, multiculturalism, social media, social psychology, Web2.0.

The culmination of these searches and desk reviews are collated and represented again in Table 3.

Brand Approach

	Economic	Identity	Consumer-based	Personality	Relational	Community	Cultural
	Before 1985	Mid-1990s	1993	1997	1998	2001	Around 2000
Key reading	McCarthy (1960), Borden (1964)	Hatch and Schultz (1997)	Keller (1993)	Aaker (1997), Plummer (1985)	Fournier (1998)	Muniz and O'Guinn (2001)	Holt (2002)
Keywords	Economic man, transaction theory, marketing mix, 4P's	Corporate branding, identity, organizational culture, vision, image	Consumer-based brand equity, brand image, brand associations	Brand personality, self, archetypes	Dyadic brand-consumer relationship, brand relationship quality	Brand communities, brandfests, the brand triad, the internet	Globalization, popular culture, brand icons, No logo
Brand perspective	Functional	Corporate	Cognitive psychology	Human	Human	Social	Cultural
Consumer perspective	Economic man	Stakeholder	Computer	Psychological	Existential being	Tribe member	*Homo mercans*
Scientific tradition	Positivism /empiricism	Socio-economic constructivism /interpretivism	Cognitive psychology	Human personality psychology	Existentialism, phenomenology	Anthropology, micro-perspective	Cultural studies
Methods	Scanner panel data, laboratory settings, quantitative	Organisational culture studies and organizational values, Heuristic methods, storytelling	Cognitively based association maps, interviews, projective techniques	Mix of qualitative and quantitative methods, scaling techniques	Depth interviews, life story method	Ethnography, netnography	Macro-level analysis on microlevel data
Managerial keyword	Control	Monologue	Programming	Symbolic exchange	Friendship	Discretion	Bird perspective
Supporting themes	"Traditional" marketing, 4 P's	Organisational identity, corporate identity, image, reputation	Cognitive psychology, the information-processing consumer	Personality, consumer self, brand-self congruence	Animism, relationship theory	Community theory, subcultures of non consumption	Cultural consumption, No logo, the citizen brand prospect
Brand value creation	Marketer → Consumer	Marketer → Consumer	Marketer ← Consumer	Marketer ↔ Consumer	Marketer ↔ Consumer	Marketer / Cons. ↔ Cons.	Marketer ↔ CULTURE ↔ Consumer

Table 1 Taxonomy of Brand Management, 1985-2006 (Heding, Knudtzen and Bjerre, 2009 pp.246-247)

	Economic	Identity	Consumer-based	Personality	Relational	Community	Cultural
Key texts	Garner and Levy (1955), McCarthy (1960), Borden (1964), Kotler (1965), Levitt (1983), Carpenter and Lehman (1985), Park et al (1986), Zaichkowsky (1991), Grönroos (1994), Bucklin et al (1995), Papatla and Krishnamurthi (1996), Ackerman (1997), Bath and Reddy (1998), Keller et al (1998), Nelson (1998), Yudelson (1999), Schultz (2001), Hultman and Shaw (2003), Demirdjian and Turan (2004), Vargo (2004), Constantinides (2006), Erdem (2006)	Kennedy (1977), Olins (1978), Olins (1979), Scott et al (1979), Bernstein (1979), Albert and Whetton (1985), Gray and Schmeltzer (1987), Abratt (1989), Olins (1989), Aaker (1991)(1996), King (1991), Ind (1992), Aaker and Biel (1993), Balmer (1995), Kennedy (1977), Hatch and Schultz (1997), Ind (1997), Balmer (1997), Fombrun and van Riel (1998), Ind (1998), de Chernatony (1999), Giola (2000), Hatch and Schultz (2000), Balmer (2001a), Balmer (2001b), Hatch and Schultz (2001), Ind (2001), Mitchell (2001), Olins (2001), Balmer and Greyser (2003), Hatch and Schultz (2003), Berens et al (2005), Schultz et al (2005)	Mitchell (1982), Anderson (1983), Bahn (1986), Bettman (1986), Aaker and Keller (1990), Keller (1993), Franzen and Bouwman (2001), Louro and Cunha (2001), Campbell and Keller (2003), Keller (2003a)(2003b), Keller and Lehman (2003), Keller (2005), Allen et al (2006),	Sirgy (1982), Plummer (1985), Belk (1988), Durgee (1988), Klein and Kernan (1988), Aaker (1997), Kapferer (1997), Chung et al (2001), Phau and Lau (2001), Wertime (2002), Azoulay and Kapferer (2003), Smith et al (2003), Helgeson and Supphellen (2004), Thomas (2004), Ahuvia (2005), Diamantopoulos et al (2005), Escalas and Bettman (2005), Govers and Schoormans (2005), Johar (2005), Sung and Tinkham (2005),	Thompson et al (1989), Fournier (1991), (1995) (1998a) (1998b), Kleine et al (1995), Fournier and Yao (1997), Fournier et al (1998), Stern et al (1998), Gürhan-Canli and Ahluwalia (1998), Hanby (1999), Brown (2001), Aggarwal (2004)	Schouten and McAlexander (1995), Kozinets (1997), McAlexander et al (2002), Muniz and O'Guinn (2001), Aaker and Joachimsthaler (2002), Kozinets (2002), Brown et al (2003), Algesheimer et al (2005), O'Guinn and Muniz (2005), Muniz and Schau (2005)	Mick (1986), Frank (1997), McCracken (1988) (2005), Alden et al (1999), Klein (2000), Aaker et al (2004), Holt (2002) (2004), Kozinets (2002a)(2002b), Garsten and Hasselström (2004), Holt et al (2004), Thompson and Arsel (2004), Askegaard (2006), Arnould and Thompson (2005), Schroeder (2005), Allen et al (2006), Thompson et al (2006)

Table 2 Detailed taxonomy of brand management articles up to 2006: classified according to the significant conceptual brand management approach and school of thought

Seminal conceptual texts	Linton (1936)(1945), Lewin (1947), Kroeber and Kluckhon (1952), Nagashima (1970), Olins (1978)(1979)(1989)(2001), Sirgy (1982), Friedman (1986), McCracken (1986)(1990), Ajzen (1988), Belk (1988), Doyle (1989)(1994), Aaker (1991)(1996)(1997), Batra and Ahtola (1991), Elliot and Roach (1991), Featherstone (1991), Fournier (1991)(1995)(1998a)(1998b), Nonaka (1991), Grunig (1993), Keller (1993)(1998)(2003a)(2003b), Dawar and Parker (1994), Hofstede (1994), Miller (1995), Frank (1997), Hatch and Schultz (1997), Maklan and Knox (1997), Elliot and Wattanasuwan (1998), Christensen (1999), Hanby (1999), Helman and de Chernatony (1999), Dye (2000), Klein (2000), Usunier (1996)(2000), Aaker et al (2001), Brown (2001), Collins (2001), de Chernatony (2001), del Rio, Vazquez and Iglesias (2001), Franzen and Bouwamn (2001), Hill and Lederer (2001), Ind (2001), Lelyveld (2001), Muniz and O'Guinn (2001), Ries and Trout (2001), Holden (2002), Holt (2002)(2004), Kozinets (2002a)(2002b), Brown et al (2003), Czellar (2003), Hatch and Schultz (2003), Keller (2003), Lievens and Highhouse (2003), Aaker et al (2004), de Chernatony and Drury (2004), Gong et al (2004), Miles and Mangold (2004), Barrow and Mosley (2005), Karmark (2005), Lindstrom (2005), Vallister and de Chernatony (2005), Wipperfürth (2005)
Key texts (2005-2011)	Baudrillard (2005), Derrida (2005), Freling and Forbes (2005), Lindstrom (2005), Keller (2005), Muniz and Schau (2005)(2007), Allen et al (2006), Askegaard (2006), Hayes et al (2006), Madden et al (2006), Schroeder and Salzer-Morling (2006), Aaker (2007), Olins (2007), Monga and Lau-Gesk (2007), Swaminathan et al (2007), Whitelock and Fastoso (2007), Ember and Ember (2007), Gilmore and Pine (2007), Muniz and Schau (2007), Miller and Woodward (2007), Whitelock and Fastoso (2007), Allen et al (2008), Fehle et al (2008), Fournier et al (2008), Keller et al (2008), McCracken (2008), Pringle and Field (2008), Matthews and Wacker (2008), Strizhakova et al (2008), Till and Heckler (2008), Carassa and Colombetti (2009), de Chernatony (2009), Fournier (2009), Fournier and Lee (2009), Hall (2009), Heding, Knudtzen and Bjerre (2009), McCracken (2008)(2009), de Mooij (2010), Holt and Cameron (2010), Kapferer and Bastien (2010), Laforet (2010), Tungate (2010), Fournier and Avery (2011a)(2011b)

Table 3 Seminal, key and supporting texts, up to 2011

At this stage of the background theory development the first contributions were made – by updating and expanding literature sources according to existing lenses.

Building on this premise, following further desk reviews and memoing, the researcher used the selected seminal and texts from 2005-2011 as a conceptual basis for mapping an overarching emergent trends and prevailing themes within the entire body of texts [Table 4]. This signalled the second stage of background theory and contributions to new knowledge. This process of a calling of the lens, led to the identification of the significant and prevailing trends within each school of thought, which were used as a basis for further critical evaluations. Analysis led the researcher towards the decision that the table categories should be preserved, but re-ordered – which had the effect of bringing forth a new way of cross-mapping schools of thought and linking them together.

Having collated and grouped this body of literature, the next sections critiqued the revolutionary and dominant factors within them, with the aim of establishing:

- A body of updated knowledge
- A coherent background theory
- A basis for proposing a new grouping post 2006
- A justification for an extension of the lens
- And eventually an identification of gaps in understanding and literature.

Brand Approach

	Economic	Identity	Consumer-based	Personality	Relational	Community	Cultural
Emerging school of thought							
Dominance and Prominence	Before 1985	Mid-1990s	1993	1997	1998	2001	Around 2000-2006
Keywords	Economic man, transaction theory, marketing mix, 4P's	Corporate branding, identity, organizational culture, vision, image *Identity commoditisation*	**Consumer-based brand equity**, brand image, brand associations	Brand personality, self, archetypes	Dyadic brand-consumer relationship, brand relationship quality	**Brand communities**, brandfests, the brand triad, the internet	Globalization, popular culture, brand icons, No logo
Managerial imperative	**Control** (Hard power)	Monologue, evangelism, exemplar	Programming	**Symbolic exchange** *Dynamism and time specificity*	Friendship, loyalty	Discretion, Social responsibility	Bird perspective, Apolitical
Brand perspective	Functional	Corporate	**Cognitive psychology**	Human *Personification*	**Human**	Social	**Cultural**
Consumer perspective	Economic man	**Stakeholder** *Signal of wider dependency*	Computer, savvy	Psychological	Existential being *Esoteric*	Tribe member	*Homo mercans* (market man)
Marketing landscape	"Traditional" marketing, 4 P's	Organisational identity, corporate identity, image, reputation	Cognitive psychology, the information-processing consumer	Personality, consumer self, brand-self congruence	Animism, Relationship theory	Community theory, subcultures of non consumption	Cultural consumption, No logo, the citizen brand prospect
Scientific tradition	Positivism /empiricism	Socio-economic constructivism /interpretivism *Postmodernism and deconstruction drivers*	Cognitive psychology	Human personality psychology	Existentialism, phenomenology	Anthropology, micro-perspective	Cultural studies
Methods	Scanner panel data, laboratory settings, quantitative	Organisational culture studies and organizational values, Heuristic methods, storytelling	Cognitively based association maps, interviews, projective techniques	Mix of qualitative and quantitative methods, scaling techniques *Increased complexity, technology and software*	Depth interviews, life story method	**Ethnography**, netnography	Macro-level analysis on microlevel data
Brand value paradigm	Marketer → Consumer	Marketer → Consumer	Marketer ← Consumer	Marketer ↔ Consumer	Marketer ↔ Consumer	Marketer ↔ Cons. / Cons.	Marketer ↔ Consumer / CULTURE

Table 4 Revised and annotated Taxonomy. Significant trends are indicated in bold red. Supporting factors are in italic green.

2.4. Key issues affecting brand management

Having sought to examine the prevailing perspectives on brands and branding, the following sections will focus on the more managerial aspects of brands and branding.

Kapferer (2008) explains that since 1990 brand thinking has had to adapt to modern markets, as there are 'new realities' (p.137 & 144). It has been suggested that a brand in turn gains a personality, of sorts. Freling and Forbes (2005) conclude that a brand's personality *"helps (at least in the consumer's mind) to define the consumer's image"*. The key recognition as they see it is in recognising that *"the creation of personality is a 'joint venture' between the brand's management and the consumer"* (Freling and Forbes, 2005, p.412).

Hayes, Alford, Silver and York, (2006) also describe a brand as an *"active relationship partner"*. So much so that their findings suggested that:

> *"attractive brands, like attractive people, may be perceived as possessing certain relationship advantages compared to those perceived as less attractive."* (Hayes, Alford, Silver and York, 2006, p. 306).

This assertion seems to suggest that consumers firstly have what could be described as an almost full-blown relationship with a brand. And secondly, a growing body of research is tending towards the exploration of how consumers view brands, away from just passive products and services. This offers an explanation as to why *relational* and *community* approaches have followed *identity, consumer-based* and *personality* approaches. For, having established that brands have allegorical human traits, it follows that they will interact in comparably human ways. In doing so, this guides brand thinking towards the humanities and social sciences methodological frameworks, which have been selected by the researcher.

Till and Heckler (2008) describe the process of brand personality building, amongst others as:

- An emotional connection
- A process of courtship

- Viewing imitation as an ineffective form of flattery [which leads the researcher to consider whether many effective branding activities may in fact be perishable and unique to the brand]
- A collective initiative.

Echoing these sentiments, Doyle (1994) states that the core concern of marketing should be in the decommoditisation of products. Wilson and Liu (2009) suggest that such perspectives lend themselves towards enabling analysis that encapsulates the more meaningful implicit and embedded facets of branding and culture, which individuals experience. Miller (1995) argues for a materialist understanding of consumption that recognises the choices and the constraints, which shape consumer behaviour in its widest sense. Collins (2001) uses Miller's premise to assert that,

> *"brands and branding represent important issues for analysis, because they have a capacity to (re)constitute reality insofar as they make certain representations of reality more-or-less persuasive and/or attractive"* (Collins, 2001, p.192).

This, Collins (2001) says is reflective of an avoidance of consumer indifference. Therefore by merit of a brand gaining a memorable and favourable market position, this intangible and implicit component appears to be central to both the brand and the consumer.

Aaker (2007) states that categorization theory is a useful tool in understanding the process and objective of influencing. An extension of this approach can be used as a basis for managing brand creation. For it,

> *"provides coherence to knowledge and judgments about nearly all aspects of daily life – including people, issues, products and brands"* (Aaker, 2007, p. 16).

Aaker follows this by asserting that there are two prevalent models of categorization: the first model,

> *"conceptualizes a prototypical, hypothetical object in the category that could be an 'average; or 'ideal' object. New objects could be evaluated as to how similar they are to the prototype... The second model conceptualizes a category as a collection of exemplars of the category, one or more objects that represent the category well"* (Aaker, 2007, p. 16).

With this in mind, it is suggested that research should attempt to gain opinions from subjects on both categories: hypothetical and the actual - in an attempt to test the strength of opinion and level of critical evaluation held by participants.

However, as branding is being coupled with culture, it is questionable whether brand categorisations should centre on exemplars, rather than capturing all facets of human existence. The *cultural approach* appears to widen the field of analysis by embodying the view of a 'bird perspective', drawing from anthropological narratives of inductive reflections. These are rooted in placing and analysing brands within societal phenomena. Therefore it is argued that beyond the economic approach, which is the founding principle, the resulting schools of thought have sought to add texture and refinement to how brands can be valued and ultimately controlled. The necessity for increasingly complicated and inter-connected approaches appears to be due to the fact that predicting how a brand performs is becoming increasingly problematic. The *cultural approach* presents examples of societal phenomena, which go against conventional brand thought. Without further examination, it would appear that strategic brand management and adherence to established frameworks, may not guarantee success – as the non-corporate consumer, especially through social media, has been gifted the opportunity for collective influence and power, which can outweigh that of organisations.

When examining management perspectives further, in response to market factors, Christensen (1999), concludes that a sizeable number of senior managers in industry believe that the weaknesses of many methods outweigh their strengths, when attempting to search for innovation in product ideas. The weaknesses they attribute to insufficient focus on taking consumer preferences into account. Christensen asserts that consumers tend to scan across categories for something that will *"do the job best"* and *"discover what the consumer has already discovered"* (Christensen, 1999, pp.41-42). In contrast, Christensen also observes that:

> *"Most brand architectures are not structured to help customers link the product with the job for which the product is meant to be hired. Instead, the marketers' goal seems to have been to position the product to be used in as many jobs as possible. The unfortunate result is that the product and brand are sub-optimized for every job."* (Christensen, 1999, pp. 47-48).

Whilst Christensen's (1999) findings confirm that brands provide a worthy promotional mechanism, they perhaps still encounter difficulties when marketing the benefits of the product itself. It would appear that this link

remains latent and subject to consumer interpretation. Furthermore, it is argued that a position of strength over acknowledged weaknesses delivers contingency or resource-based strategic approaches - which are not what most brand theories are designed to deliver, or examine. For these brand theories are largely concerned with exemplars of success, or pariahs of failure.

Through adopting Chevron's (1998) position, pertaining to brands and products being diametrically opposed; Christensen's (1999) findings also highlight that many strategic brand management initiatives, appear to have inherent weaknesses resulting from these dichotomies. This is because brand innovation processes seem to act independently from that of the product or service in its initial stages. As a result, there are likely to be two stages - where the commodity is created, followed by its mapping to a brand upon completion. The desire of a brand architect is to market the product to would-be consumers, but following Christensen's (1999) suggestions, it appears to point towards degeneration in that intended marketing message, upon reaching consumers.

Wilson and Liu (2009) state that the core focus should be on viewing brands through the eyes of their architects, as their initiators. Whilst the indications are that there are significant consumer-driven factors affecting a brand strategy, which may lead to consumer confusion and subsequently towards, what is termed 'racket feelings', in the field of transactional analysis and psychotherapy - nevertheless their effects remain secondary. The researcher asserts that consumers do play an active part in a shaping a brand's message, but unless guided by effective encoding on the part of the brand architect, the process will remain outside of the brand architect/manager's control. Therefore, it is argued that research needs to be undertaken from both marketers' and consumers' perspectives, and then subsequently the interplay between both.

Control of the brand appears to be a point of continued contention. In contrast to the findings of Dye (2000) and Brown (2001), Maklan and Knox (1997) suggest that customer value is *"increasingly being generated by business processes traditionally outside the remit of brand management",* which in turn leads to a diminishing brand value (Maklan and Knox, 1997, p.119). Their recommendations, for increasing brand value and ultimately bridging the gap with consumers, lie in

optimising aspects of the supply chain process. del Rio, Vazquez and Iglesias (2001) found that one generally accepted view draws from an associative network memory model, where perceptions about a brand are, *"reflected by the cluster of associations that consumers connect to the brand name in memory."* A way in which consumers were able to distinguish between brand associations, was by their level of abstraction, *"that is, by how much information is summarized or subsumed in the association."* (del Rio; Vazquez and Iglesias, 2001, p. 411).

Therefore, whilst brands are enjoying exponential successes, in comparison to other marketing activities, it appears that opinions are that they could perform even more successfully. In response, it is the opinion of the researcher that whilst Maklan and Knox (1997) make a notable point, suggesting analyses outside of brand functions should be favoured to evaluate brands: a crucial focus of research nevertheless should still remain in examining the mindset of the brand architect/manager, with respect to the intangible aspects of a brand. This is in light of the findings, as stated earlier, by Doyle (1994), Christensen (1999), Collins (2001), Hayes; Alford; Silver and York, (2006), and Aaker (2007).

Having reviewed these areas, it would appear that there are three emergent key issues central to evaluating the performance and management of brands, which will now be discussed.

2.4.1 Transaction versus Relationship based Economics

Homo economicus is a term that has been used within the field of economics for over a century (Persky, 1995; Zabieglik, 2002). It follows then that the economic approach to brand management also holds this concept central. In doing so, it is clear from the literature grouped under the economic brand approach that the suggestion is goals of the marketer and consumer are achieved through drivers rooted in transactional individualism. However, the proceeding brand schools of thought appear to move away from this position towards progressively collaborative economic exchanges.

In support of these arguments, a challenge to the concept of Homo economicus, continues to come from anthropological economists: Mauss (1924), Polanyi (1944), Sahlins (1972) and Godelier (1999) - through empirical cross-cultural

comparisons. Their main point of concern is that a Homo economicus perspective fails to take into account kinship-based reciprocity. They argue that without the consideration of reciprocity, this turns production into fictitious commodities, through a disembedding process (Polanyi, 1944). Furthermore, through an extension Durkheim's (1895) discussion on *Social facts,* Dahrendorf (1958) postulates the counter term Homo sociologicus. In this, the assertion is that the pursuit of fulfilling social obligations holds a greater pull than selfish interests. With these in mind, brands and their stakeholders appear to fulfil greater obligations than merely monolithic unilateral transactions. Instead, brands, marketers and consumers occupy positions in society that may drive economic gains; and secondarily, this provides social capital - which binds individuals and ascribes meaning to their existence.

The progression in brand management approaches reflects such tensions and considerations, when trying to position stakeholders according to their: role, influence, motivations and gains. Furthermore the re-alignment of economic marketing evaluative factors to embrace anthropological arguments draws in the significance on cultural branding. From a corporate perspective, the idea of Homo sociologicus is apparent in the formalisation of corporate altruism, and Corporate Social Responsibility (CSR) functions. Branding is used in many of these cases as a means by which activities can be linked back to the organisation - using corporate identity and public relations frameworks (Bernays, 1928, 1955). Also, the idea that a brand is merely an external function and marketing tool appears outdated - as literature points towards the suggestion that employees should be viewed of as being 'internal customers'.

2.4.2 Embracing consumer perspectives

Aaker (1991), de Chernatony & McDonald (2003), Czellar (2003), Franzen and Bowman (2001), Keller (1993), and Lindstrom (2005) state that brands are best understood from a consumer perspective. This is a growing trend and theme in brand thinking. However, it is still unclear to what degree and how that could and should govern the management of a brand.

Muniz and O'Guinn (2001) place the brand at the focal point of the community, in an almost matriarchal role - defining communities' commonalities from

derivations of sociological theory. McAlexander *et al* (2002) argue that in addition to the factors cited by Muniz & O'Guinn (2001), committed consumers are placed at the focal point of communities. This customer-centric model implies a shift in perspective - explaining the relative autonomy and interactions of individual elements. In this setting, the brand, product, and marketer do not assume the singular role of brand community facilitator; but instead are shown to be active community members creating experiences, which circumnavigate around a focal consumer. Ouwersloot and Schroder (2008) suggest that there are two forms of brand community: one where the brand is implicitly involved within the community (and often the founder and orchestrator); and one where the brand is explicitly uninvolved.

It remains contentious whether such approaches should be at the expense of appraising the nature of brands from their inception - by brand managers and creators. Furthermore, the researcher suggests that as consumers interact and are subject to the influence of non-consumers outside of their brand community, their understanding should in turn be examined also, with respect to those 'others' that they choose to engage with. This will have a further bearing on brand stakes and it appears that seldom literature evaluates the views of those who are not contractually involved with brands through employment and commerce, or who consume – which essentially is also a form of contract. This issue will be addressed in later sections, considering if the most significant definitions of contract should be judged as being psychological; and comparably transactions should be psychoanalytical.

As stated, the researcher's focus is on Brand Culture, as a basis for further discussions. The rationale being that it is the most recent approach to understanding brands and it appears to be of most relevance when investigating the nature of various brand interactions in context. By induction, groups 2-7 as identified by Heding, Knudtzen and Bjerre (2009) earlier, are reflective of a movement towards defining more of the tacit and figurative aspects of a brand, which suggest that emotion plays a significant role. In doing so, this elevates emotion towards being more significant and explicit. It is argued that the driving factor behind this has been the increased number in observations and practices

which consider how human characteristics are projected onto a brand (Kotler, Wong, Saunders and Armstrong, 2005; Hooley, Saunders and Piercy, 2004; de Chernatony, 2001; Ries and Trout, 2001; Aaker, 1996; Kapferer, 1992; Keller, 1998; Doyle and Saunders, 1985). As a natural extension: as brands become more 'human', they can in turn be evaluated and classified according to more human characteristics. Namely, *image*, *identity* and *personality*.

2.4.3 Humanising Brands: Image, Identities and Personalities

A brand's purpose is to engage in and optimise active participatory relations. When examining the nature of these relations, Keller (1993, 1998) classifies brand associations into three major categories: attributes, benefits and attitudes. From these, Fournier (1998) and Rook (1985) observe that brands are embedded in a historical context, which:

1. Creates the concept of brands having a personality that is the sum of emotional added values, and
2. Denotes functional purpose and inherent quality (McWilliam and de Chernatony, 1989).

Aaker (1997), Kapferer, (1992, 2008) and Sirgy (1982) house brand personality within a landscape of brand image, creation and building. Furthermore, Belk (1988), Malhotra (1981) and Kleine, Kleine and Kernan (1993) observe that brand personalities are congruent with aspirational or ideal value seeking, undertaken by associated stakeholders, as a reflection of self. And so, brand preference and usage are driven by personality (Biel, 1993; Aaker, 1996).

Whilst viewing brands as humans appears to be a well-established conceptual argument, it is argued that there still remains a gap. For not all humans are commercial entities, but a brand's continued existence at some stage in its life necessitates the ability to generate revenue, for a sustained competitive advantage. Therefore, brands have to be judged as 'humans' according to how they interact with real humans (which humans are not). In response, a polemical argument could be posed to suggest that when humans engage with brands, they in fact become economic and commercial entities, with are in turn judged. Collectively, these point towards brands being engaged in identifiable relationship exchanges with at least two other humans: the brand

creator/manager and the target (consumer). In further support of a view, which is based upon calculable figurative communication exchanges, Laforet, (2010) states that the overarching function of a brand is to:

- Reduce risk
- Create image benefit
- Increase information efficiency

(pp.14-15). Laforet's points can also be interpreted as extending these functions to the target consumer – in that consumer behaviour is governed by risk reduction (more conventionally termed as dissonance reducing behavioural traits); creating image benefit to them and the brand through brand consumption; and *de jure* through their involvement facilitating increased information efficiency.

These beliefs shape representation, consumption and commercialisation - and lead ultimately to the institutionalisation of cultural values and beliefs (Richins, 1994; McCracken, 1986). As cultural significance is drawn into branding, Aaker, Benet-Martinez and Garolera (2001) sought to combine an emic-etic approach to assessing brand personality. Their findings point to personality values and exemplars differing across the cultures, which they examined (United States of America, Spain and Japan). This is further evidence for examining culture in connection with brands.

Therefore, as observed by Belk (1988), Solomon (1996), Livingstone (1995), Lannon (1992), Kim (1990), Friedman (1986), Levy (1963): findings suggest that gaining understanding of both the creator/manager and the consumer are central to understanding the meaning of a brand. Senders and receivers of messages attach possessions, myths and perceptions, which in turn solidify coherent images, identities and personalities. These in turn are attributable to organisations, groups and individuals alike and help to govern what constitutes a sustained image and subsequent reputation and loyalty trait (Temporal and Alder, 1998).

By adopting a deductive-inductive approach, rooted in syllogisms: the cultural approach to branding will now be explored in more detail. And subsequently, in response, a branding approach to culture will also be discussed.

2.5. The cultural approach to brand management

In the interests of investigating the interplay between brands and culture: syllogisms were used to investigate both from two perspectives. Section 2.5 first considers the impact of culture and cultural perspectives on branding. Section 2.6 then appraises cultural standpoints and how brands have influenced the agenda.

With the rise in brand strength, through humanisation, notoriety, extensions and consumption, the literature points to culture being the vehicle for success and the frame of reference. Olins (2007) writes that,

> *"Brands and branding are the most significant gifts that commerce has ever made to popular culture. Branding has moved so far beyond its commercial origins that its impact is virtually immeasurable in social and cultural terms"* (p.12).

From this, Olins concludes that whilst it may sit uncomfortably with a lot of people to consider that more charities, the arts, universities, sports and cultural activities will be inevitably and inexorably linked to and governed by brands: *"for most part it will make them better, more effective and more influential"* (p.234). These observations signal the marriage between brands and culture.

Holt (2002) classifies virtually every consumer branding initiative into three models:

- Mind-sharing branding (cognitive)
- Emotional branding (balancing emotional and relational aspects)
- Viral branding (largely driven by the internet)

Holt asserts however that, *"while these conventional models may work for other types of branding, they do not build iconic brands"* (p.13).

Holt argues that iconic brands are guided by a set of tacit strategic principles, which he calls the *cultural branding model.* What the researcher has chosen to investigate is to what degree cultural branding models can also explain and provide erudition to conventional branding as well.

Within the *Cultural Approach,* brands are analysed with a macro level focus.

> *"...consumers' identity projects are analysed at a (macro) collective level. The relational approach is concerned with the understanding of individual identity projects as important contributors to brand meaning",* (Heding, Knudtzen and Bjerre 2009, p.210).

Therefore a shift in thinking appears to be that there is a movement towards understanding through homogenous collectivism. The researcher suggests a middle ground, due to the fact that previous schools of thought continue to prevail. Therefore, it appears that what is attempted by academics and practitioners are positions of top-down/bottom-up analysis, which renders stakeholders as 'collective individuals'. And so, what remains in separating various schools of thought is the focus and value attributed to micro and macro analysis. Moving forward, the cultural approach is a by product of a phenomenon where,

> *"The brand is subjected to social and cultural changes completely outside the brand manager's control... this means that the marketer is not the only author behind the brand meanings"*, (Heding, Knudtzen and Bjerre 2009, p.211).

A further cornerstone of the cultural approach lies in the assertion that a brand is a perceived as a cultural artefact. Holt (2002) asserts that in the cultural approach,

> *"A 'bottom-up' interpretation of data is applied; the informants are not expected to express idiosyncratic meanings, but rather to be acting as mouthpieces of the surrounding culture"* (p.73).

It appears therefore that the cultural approach is arguing that with so many factors outside of the control of the brand and associated employees, microanalysis, which maps brands from their marketing objectives and inception, only yields limited findings. In support of this, observations made previously in literature, outside of the cultural approach to branding, also highlight brand management challenges, due to a lack of control and understanding. Of these gaps, culture is seen to be the most pervasive and in part a silo for categorising both macro and micro environmental factors. In response, Holt (2004) adopts a methodological approach, which uses *"micro level data – people's stories about their consumption – to investigate macro level constructs"*, (p.73).

In keeping with this school of thought, Garsten and Hasselström (2004) state that *"Market man* is forged out of the interplay between different technologies" (p.213) – namely that of production, sign systems, of power, and of the self. This also appears to lend support to the polemical argument raised earlier, that consumers become economic and commercial entities. Empirical evidence of new consumer commercialism can be seen with reverse auctions, such as *eBay* and *YouTube*

'haulers' (Jacobs, 2011). Therefore as technology has a stakeholder levelling effect, which encourages democratisation, inclusion and interaction between more parties: stakeholder definitions will become more communication based and culturally embedded.

From this the researcher asserts that brands attempt to drive this phenomenon, using culture – by embedding themselves within more and more cultured communities. In addition, *a posteriori* concepts such as brand knowledge and acculturation are experience driven (Fodor 1998, Mason and Bequette 1998, Simon 1996). In light of these, how brand stakeholder relations can be mapped as part of a network will be discussed later in the next chapter, as a part of focal theory.

Holt and Cameron (2010) continue with Holt's (2004) socio-cultural model for branding, and offer further observations as to why culture is so central to branding. Provocatively, they write that,

> *"When we explored the most influential innovation models in the management literature, we found the same restrictive intellectual parameters that we had encountered in marketing literature – except this time myopia was a result of the domination of economics rather than psychology [found in marketing texts]. The leading innovation models all assume that markets work only in the way that they are described in basic economics textbooks, where innovation is driven by what we call 'better mousetraps'. These models ignore that innovation proceeds at a cultural level, not just the nuts-and-bolts level of the physical product or service"* (p.ix).

Holt and Cameron's (2010) position on culture being central to branding and gaps in understanding, due to first principles of economical brand definitions has been adopted. However, further to this, a key area of investigation for the researcher was looking at how brands and culture are defined, interpreted and used practically, by managers. From this, theoretical constructs of: branding, brand management and culture are attempted which synthesise academic and practitioner thinking.

Schroeder and Salzer-Mörling (2006) observe that there is an understanding of basic cultural processes that affect contemporary brands, and more recently attention has shifted from brand producers towards consumer response to understand how branding interacts with consumers to create meaning" (p.iii). What the researcher wished to capture in this thesis was also the understanding

that brand producers are also consumers. Therefore, neither should be completely separated. Furthermore, following the observed complexity of the research problem, it is felt that brand experts have the ability to articulate observations and meanings to a greater degree: due to their, practices, roles and experiences. And therefore, they present a worthy target for rich in-depth research.

Having stated Chevron's assertions that "the concept of a 'brand' and that of a 'product' are diametrically opposed in many ways." (Chevron, 1998, p. 261); supported by Collins' (2001) findings, it is argued that a brand is created with the aim of transcending the tangible boundaries faced by commodities. This then moves them beyond being artefacts, towards unbounded cultural artefacts of meaning. Therefore the consumption of brand need not be restricted to specific product categories. Pringle and Field (2008) suggest that unlike their product offerings, brands need not 'die'. This is a further signal that brands are allegorically part of culture.

An example of this extension has been cited by Klein (2000), where she observes that the Nike *swoosh* is one of the most requested tattoos in the USA. By individuals electing to have a brand tattooed permanently on their skin, they are not only explicitly demonstrating that the brand is of more significance and desirability than the product, but that it is also a worthy component of their own entire value system. Because tattoos are permanent, they also preserve the continued significance of the brand. In addition, it appears that brands can develop sublime characteristics, which outlive their associated products. Building on these brand characteristics, Nike has been able to enter new markets and extend its product categories. Furthermore, such brands have been used to pull seemingly unconnected markets together, under one coherent identity. Therefore, when brands are created, if strong enough and if embraced by consumers, they collectively become symbiotic beings and have the potential to eventually possess a life of their own.

Thus, the cultural branding school of thought appears to be moving the 'human' brand agenda further, beyond categorisation only according to identity, consumers, personality, relationships and communities. It appears that the

cultural approach becomes the common denominator for the preceding schools. However, in doing so this opens up a further discussion as to what sort of culture, at what level, from whose perspective, and for how many.

2.5.1 Cultural brand encounters and dilemmas

Nagashima (1970) surveyed US and Japanese businessmen's attitudes towards foreign products. Findings suggest that the national image of any country varies across cultures. An example given was that 'made in England' was found to be significantly more prestigious in Japan, in comparison to the United States. A case therefore is made therefore for a country constituting a key component within a brand's creation. Thus, national identity from a brand context is a cultural construct. In addition, Ward et al. (1986) have noted that the consumption behaviour is varied from one culture to another. They comment on how family orientations and their respective behaviours differ markedly across cultures. These studies would suggest that marketers' and consumers' cultural brand behaviours alter, according to the combined influence of: geographic, national, environmental, ethnographic and religious factors. They still however offer little insight into whether brands are created in a manner, which is best suited to being able to cater for these different tastes. Furthermore, it continues to raise the question that with a cultural brand approach, whether this is more about a culture of understanding brand management, rather than management understanding brands within culture.

Lelyveld (2001) referred to Timberland's surprise at*"being hot in the urban community with no marketing at all... no one was more surprised by the phenomenon than the company itself"* (p.8).

Unprompted by Timberland, the brand has been adopted as a prestigious unisex uniform by Hip-hop music artists and fans. The originating and committed devotees of Hip-hop, largely from initially Afro-American and Hispanic communities, describe Hip-hop as music, an art form, a culture and a way of life (Wilson, 2011a). These are sentiments that continue to be expressed in numerous song lyrics - in addition to rhyming couplets, naming, lauding and describing the Timberland brand frequently. Lelyveld (2001) devotes some time to this area, mapping clothing brand names to Hip-Hop artists. As a result, Timberland has

also reaped the benefits with having their brand acquiring more human traits, 'street credibility' and 'coolness', not to mention market share. Timberland's surprise appears to suggest that the brand was not created with this lucrative urban audience in mind.

Therefore, the question arises, if a future brand architect wanted to create a brand for this same target audience, how would they go about doing it? It appears that brands, such as Timberland, are able to react to interested new segments; but without more understanding, they will perhaps find it difficult to initiate such interactions. Furthermore, because Timberland enjoyed successes amongst cultures and sub-cultures not by its own volition, does this make it a cultural brand approach exemplar?

In contrast, Tommy Hilfiger knowingly adopted a cultural approach, which strategically *"focused on young urban African Americans to imprint his brand with a street hipness"*; that finally spread to reach *"a broad audience of all ethnicities"* (Dye, 2000, pp.144-145).

In tandem, more rationally based product purchases, such as Islamic Finance, have also seen similarly surprising effects. Knight (2006) reports that banks offering these products have seen them consumed by non-ethnic (white) British non-Muslims. Knight (2006) continues by citing evidence in Malaysia of up to 25% of Islamic accounts being opened by non-Muslims. The figures, it could be argued, are especially surprising - considering that these financial products are non-interest bearing. The reason being that whilst they may be considered a necessity to someone following the Muslim faith, it begs the question that there must be an alternative emotional and sub-cultural reason for someone outside of the faith adopting them - where economic gain seems to take a back seat. This is especially as a consumer has to satisfy more stringent approval criteria than with mainstream high-street interest-bearing products offered by the same banks. Furthermore, whilst ethnic products from minority groups are popular in the UK (of which there is a perception that the Muslim faith is strongly rooted in cultural ethnicity), this interest is usually in food and fashion. Therefore, a further area of investigation should be in examining the relationship with culture and over variables, such as ethnicity, geographic region, exposure and interaction.

Brown (2001) comments that that whilst modern consumers are marketing savvy, the key to brand success lies in *Retromarketing* - by creating markets as opposed to serving them. Brown's (2001) findings would support the approach used by the Tommy Hilfiger brand. However, the majority of literature argues that success lies in being able to predict current cognitive and conative consumer behavioural patterns accurately. Further to this, it appears that it is the marketing, rather than the brand, which is being crafted towards being able to appeal to these consumers, as many commodities are branded after having been created. Therefore the area of investigation, which still remains is how cultural brands can be created and appeal to different segments, even before they are marketed. This cements branding as being a field in its own right, as opposed to a sub-discipline of marketing, which it appears is an area of concern for brand managers - as the literature observes that they have issues of control.

Further highlighting the suggested complexities faced, when reviewing culture, branding and consumer behaviour: the researcher cites a study by Gong, Zhan and Tiger (2004), which examines the perceptions of Western firms when marketing to Chinese youth. Gong, Zhan and Tiger (2004), state that *"Unfortunately, many Western marketers"* have, *"mistakenly"* believed that it is hard to group Chinese youth into a distinct segment based on psychographics (p.46) - due to a lack of understanding of 'old' and 'new' culture.

In addition, the arguments of these Western marketers, according to Gong, Zhan and Tiger (2004), have been that the cultural frames of reference of these Chinese youth in question are too dissimilar to enable their inclusion as part a global youth segment. However, Gong, Zhan and Tiger (2004) assert that this is a fallacy - as these same Chinese youths, in fact exhibit comparable rebellious inclinations and share similar interests with their Western counterparts. Having stated this, Gong, Zhan and Tiger (2004) provide evidence indicating that the same Chinese youth *"depend on the Internet for information, worship brand names, and chase fashions and trends."* (p. 46).

These findings in themselves demonstrate that Chinese youth do exhibit notable and definable psychographic traits, which could group them within a global market. They also appear to suggest that whilst brands are experiencing the

benefits of cross-cultural consumption, denationalrialization and deterritorialization; there nevertheless appear to be significant gaps in understanding between cultures. Perhaps more worryingly, they indicate that marketers, in the absence of understanding, are still willing to market their products to an audience that they do not understand. In addition, marketer's definitions of culture in this instance seem to be less about actively mapping the progression of 'old' and 'new' and the subsequent stratification process - but instead more about what is known and what is not. The possible consequences are that gaps in cultural understanding, which if not addressed, will prevail (if not increase). These in turn will affect the ability of marketers to proactively market to defined segments and perhaps even bring the cultural brand approach to an end, in favour of another school of thought.

Comparably, the researcher suggests that it should be of little surprise that there will be differences in held-values between generations, because as Wilson and Liu (2009) have observed, often research findings can show somewhat colonial, culturally diminutive, ethnically discriminatory traits; which link well with the observations of Said (2003) and Buruma and Margalit (2004) which will be appraised later. For they state that it is unlikely that these same 'Western' marketers would avoid attempts to classify and link similar segments, within their home territories in such a dismissive manner. Moreover, having established the existence of a segment such as Chinese youth, there should be no reason why existing conceptual frameworks could not be used to then define their psychographic characteristics.

Two main fields of contention are: how consumers are being defined, and the restrictive treatment of a brand as a mere commodity within marketing. A lack of understanding in these areas tallies with the shortfalls discussed earlier, as highlighted by Christensen (1999) and Doyle (1994). Where the control of the brand's identity will move into the hands of the consumer and it risks never achieving greater market potential, without more comprehensive strategic management.

Whilst this study is not exclusively examining Chinese youth, it can be deduced that there are likely to be similar inadequacies and traits with respect to the

understanding of other cultures and nationalities. Supporting these concerns, Whitelock and Fastoso (2007) in reviewing existing literature on international branding, found that very few African and Latin American countries have been objects of research and that large areas of the Asia-Pacific and Sub-Sahara region have so far not been researched.

As a further point of reference, it is argued that countries, which have inhabitants that share additional cross-border value systems, such as religion, may allow for further grouping and comparisons. Dawar and Parker (1994) analysed the existence, relative importance, and absolute magnitude of signal use in connection with branding, across thirty nationalities including China and Hong Kong. They conclude that the *"variances in the use of quality signals are independent of culture and are likely to be driven by individual factors"* (Dawar and Parker, 1994, p. 81). These findings lend weight to the possibility of looking at common cross-cultural defining attitudes. However it can be equally argued that in fact they contradict or confirm aspects of Gong, Zhan and Tigers' (2004) findings.

The issues of contention surround: whether culture is considered; how it is considered; and the necessity of a brand strategy to encompass cultural components. In addition, there exists a ten-year gap between both studies - in which time significant changes may have occurred. It is possible that in the absence of meaningful culturally based strategic brand management, consumers may suppress or adapt any of their own cultural traits. Whilst this will manifest consumer homogeneity, the drivers stem from a failure on the brands part, to achieve positive positioning. Therefore there is a real risk that with increased cultural diversity, denationalrialization and deterritorialization will come increased difficulties in predicting consumers' behaviour towards a brand. If this is the case, then the researcher suggests that the differences between Dawar and Parker (1994) and Gong, Zhan and Tigers' (2004) findings may in fact be evidence of this deterioration.

Aiello, et al (2009) gathered data from a cross-national sample, in order to obtain a more complex understanding of how the country of origin concept operates in various countries across different product categories (convenience products,

shopping goods and specialty/luxury products), when looking at consumer-brand relationships. Aiello, et al.'s (2009) survey was conducted in Italy, France, Germany, Russia, India, China, Japan and the United States. However, an interesting point to note is that in their survey, countries appear to be treated as also constituting respectively homogeneous groups. Whilst this supports Dawar and Parker's (1994) position and could be used to address the concerns of Gong, Zhan and Tiger (2004); the researcher suggests that this still presents a significant cultural gap worthy of appreciation.

2.6 Contextualising the impact of branding on culture

In response to the questions raised and identified gaps concerning culture in the previous section, the following section firstly considers the variance in perspectives concerning aspects of *culture* in further detail. Analysis has been restricted to cultural elements and perspectives, which appear to be connected and influencing brand management, derived from the previous sections. Secondly, as a cultural approach to branding has been considered, background theory will appraise the impact of branding on the cultural landscape. It is clear that in tandem there are varying perspectives as to which unit of cultural analysis is the most significant and relevant when managing brands. Observations in business and management literature point to the delineation and ascribing of cultural levels. These range from those linked directly to two variables: *individuals*, and by extension - communities, departments, organisations, regions, industries, nations; and those to culture *in abstraction* - high/low context, high/low culture, macro/mezzo/micro, East/West, Occident/Orient, and Global paradigms. Central to all of these is the idea that culture is situation specific, dynamic, and is both inclusive and exclusive.

Literature searches and analysis points towards the researcher adopting three main groupings of cultural perspectives, of relevance to brand management:

1. Business and Management
2. Socio-anthropological
3. Consumption-based.

The socio-anthropological method fits squarely in the cultural approach to branding, in response to an argued drift between conventional business and management's treatment of culture and that presented in the cultural brand approach. As an extension, consumption-based approaches appear to be a refining of traditional anthropological principles to accommodate phenomena such as brand communities, globalisation, Web2.0, social migrancy and associated hybridised multiculturalism. Finally, from these the final section provides a platform for a chosen lens and unit of cultural analysis for focal theory.

2.6.1 Business and Management cultural paradigms

Kroeber and Kluckhohn (1952) registered 164 different definitions of *Culture.* From these, they observe that the *essence* of culture is present where:

- Members of a system share a set of ideas and especially values
- These are transmitted (particularly through generations) by symbols
- Culture is produced by the past actions of a group and its members
- Culture is learned
- Culture shapes behaviour and influences one' perceptions of the world
- Language is the mediator

Holden (2002) comments on the fact that definitions have only continued to increase, rather than there being a polarisation in thought. Kroeber and Kluckohn's elements of essence offer little grounds for contention and so are considered to remain of relevance today and particularly to the brand landscape, in line with the rise of the cultural approach. However, central to the research problem is not so much 'what', rather 'how' - with the intention of offering an applied scientific approach to a human phenomenon, leading to a set of guiding principles. Therefore, the central theme taken for this study is the fact that culture relies on iterative and collaborative communication, between participants. Herskovits' (1948) earlier definition of culture that it *"is the man-made part of the environment"* offers a basis for arguing that the cultural approach to brand management places brands firmly in the hands of humans, from their creation to denaturing (or death, as they are considered to be 'human'). Smith and Bond (1998) explain that cultural definitions should include both material objects and social institutions – which points towards a tangible/intangible paradigm, manifest in: implicit, explicit and tacit nodes. In

line with this, Schein (1985) as a social psychologist, makes a distinction between *visible* and *invisible* culture. From this he creates three categories:

1. Assumptions: which are taken for granted and invisible
2. Values: where there is a greater level of awareness
3. Artefacts: the visible face of culture, which is not necessarily decipherable, and often therefore misunderstood. It consists of three manifestations:
   a. Physical
   b. Behavioural
   c. Verbal

However, these offer little guidance towards helping to decide what conceptual units allow for making cross-cultural comparisons. Because, values, norms and practices may originate from different principles and assumptions – which may then limit the number of abstractions and generalisations possible. This is perhaps why defining culture beyond what could be seen as truisms or basic principles, continues to yield further definitions.

As communication, propagation and proselytization of culture, necessitates the use of language, this will now be considered. Whilst complicated, diverse and variegated, language provides insight into how humans approach culture. In support of language being of significance, Usunier (2000), when looking at marketing across cultures, adopts an approach considering firstly English in particular, as it is the worldwide language of business. Secondarily foreign languages are considered in tandem - as collectively they all express culturally specific patterns, which are embedded in contextual situations. Literature and data searches point to the strongest global brands being known according to strong linkages with English language text and English derivatives, shaped by non-English language natives. Examples of colloquial terms are: *Americanisms, BBC English, Business English, Engrish, Indian English* and *Jamaican Patois* amongst others. Furthermore, following Usunier's observations, this study is conducted in English and it also considers how 'other' languages may shape the understanding of experts.

Business and management literature has sought to define culture according to systems and more particularly those inside an organisation and outside in the competitive environment, which govern commercial success. Within the field of

business and management, Hofstede (1994) choses to focus on levels of human endeavour, which he groups culture according to:

1. National level
2. Regional and or/ethnic and/or religious level and/or linguistic affiliation level
3. Gender level
4. Generation level
5. Social class level
6. Organisational or corporate level, according to socialisation by their work (assuming that they are employed)

More recently Hofstede's work has faced some challenges. McSweeney (2002) challenges the notion of each nation having a distinctive, influential and describable culture. Fiske (2002) critiques Oyserman, Coon and Kemmelmeir's (2002) analysis of national and ethnic differences in individualism and collectivism, which revisited Hofstede's approach - where nations are treated as cultures and culture as a continuous quantitative variable. Fiske argues that such approaches lead to conflations. These conflations he judges ignore contextual specify in norms and values; and reduces culture to explicit, abstract verbal knowledge.

Within the context of this study, such challenges are judged to be less of an issue, as the Delphi panel will be asked to define culture and their cultural identities according to their own subjective opinions, rather than the quantitative measures often employed in Hofstede originating cross-cultural analyses. Furthermore, nationality and culturally imbibed national identities are observed to have some relevance in informal communication as a moniker for much deeper meaning – in a comparable way to brand usage.

Whilst reflecting on these perspectives and further reviewing related cross-cultural management and anthropological frameworks, Holden (2002) suggests that managing across cultures is:

> *"... the art of combining varieties of common knowledge through interactive translation. In order to develop this modified concept of cross-cultural management, it will be necessary to come to an understanding of translation both as a process and as an analogy"* (p.227).

Within this he also appraises the role of language, concluding that it can be seen metaphorically with

"its symbolic powers serving to unite people with a sense of common purpose. Seen in this way, language is a very potent expression of company wisdom, lore and vision" (p.227).

Charlesworth (2008) asserts the following when looking within education:

"If one accepts that culture is a certain commonality of meaning, customs and rules (not a homogeneous entity) shared by a certain group of people and setting a complex framework for learning and development (Trommsdorf and Dasen, 2001), then one cannot deny the connection between culture and learning... (Crahay, 1996)".

Education is central to business and management practice. Globally, business and management education, especially as it is largely conducted in English, contributes towards a convergence in business communication and thought. Therefore it could be argued that brands, as the fruits of the educated, should fare well across cultures. As an extension of these observations it is argued that brands as cultural artefacts are a central part of consumer education, in their everyday marketing interactions and lives. Synthesising Charlesworth (2008), Holden (2002), Usunier (2000), Crahay (1996), Hofstede (1994), Schein (1985), Kroeber and Kluckhohn (1952) points: they appear to outline collectively that:

- Culture is acquired or created - and is transmitted subsequently through teaching and learning
- It exists on multiple levels of abstraction
- The most significant aspects of which are tacit - and therefore are understood best by those who are the most active participants in that collaborative process
- Living breathing language (verbal and non-verbal) and symbolism, which is preserved and exists in the here and now: joins participants together and presents anchors of understanding.

Following a different tack, Smith and Bond (1998) raise interrogative principles designed to underpin cultural understanding. They consider whether:

- There is one best way to run an organisation?
- A native speaker of English communicate *effectively* to a non-native speaker of English
- Increasing contact between cultures improves intercultural relations
- Human societies eventually merge into one global mega-society?

(p.2). These it is argued encapsulate the key battlegrounds for successful cultural brand management. Smith and Bond's (1998) central message is that,

"no behaviour and no spoken word has an irreducible objective meaning, Members of different groups or nations place meanings on what goes on

around them, and the nuances of these meanings often serve to define identity and to separate one grouping from another" (p.9).

A minor area of contention is their use of 'to' in the second point. Current marketing thinking argues for communications that are two-way and therefore use the word *'with'*. Smith and Bond go onto observe that contemporary social psychologist Kurt Lewin (1947) was instrumental in developing *Gestalt psychology*, which emphasises the way in which perceptions of a stimulus are influenced by its context. With this in mind a key question is whether there should be one *Gestalt*, or several. Diamond et al (2009) have applied Gestalt thinking specifically when describing sociocultural branding. Collectively, the argument is that social behavioural research should not be conducted in isolation. Furthermore, taking social deviance into account, a key principle is that,

> *"the larger the number of countries involved, the better is the chance of understanding why the results have come out as they do"* (Smith and Bond, 1998 p.33).

Literature points to the cultural brand approach adopting a 'bird view', therefore it is implied that within this thinking one Gestalt prevails. However, in response, with the preceding schools of thought leaning towards consumer views, or those of communities, this may similarly support one Gestalt, but could paint a different picture. If the view is held that one Gestalt should prevail, it is worth considering that this may be too macroscopic, or complicated. Allegorically, could be like gazing at the galaxy as a means of understanding human interactions – necessary, but limited in some ways.

Rohner (1984) notes that for many parts of the world concepts of *society* have become synonymous with those of a *nation.* Rohner (1984) goes further in asserting that the concept of a *nation* is a *Western* one, originating from circa the nineteenth century – where boundary setting has become more about political expediency, rather than to separate neighbouring societies. Therefore, it is argued that analysing separable sub-cultures linked to national identity, rather than simply nationality, becomes of more significance when attempting to understand brands and culture. Also, the researcher has considered whether the rise in significance of nations; identifiable national artefacts (such as flags); national cultures; and country of origin as an ingredient brand, are precursors an

emerging modern-day trend in branding. Furthermore, is this an offensive or defensive response to globalisation? As an extension of this thinking, can brands also be seen as a modern day phenomenon, which marks culture's and individuals' way of mediating the effects of Globalisation, by preserving manageable units of meaning and identity?

de Mooij (2011) gives consideration to the effects of *globalization* and *global consumer culture* – and in particular those negative effects. de Mooij (2011) observes that,

> *"In practice, notwithstanding the worldwide reach of television and the internet, in many people's lives, in consumption or entertainment habits, be it music or sports, the people of different nations continue to have different habits, tastes, and loyalties. Instead of causing homogenization, globalization is the reason for the revival of local cultural identities in different parts of the world."* (p.5).

This is a view also supported by Giddens (2000) and Featherstone (1991). de Mooij challenges Levitt's (1983) rational view of global markets, where technology leads to the homogenization of consumer wants and needs - as they will crave high-quality and low price standardized products over customized high-price offerings. de Mooij (2011) points to observation of Usunier (1996), that there exists no empirical evidence to show homogenization of tastes or the appearance of universal price-minded consumer segments" (p.6). Furthermore, that those consumers are not after profit maximization.

> Instead, *"Convergence at a macro level (e.g., convergence of GNI [gross national income] per capita) does not necessarily imply convergence of consumer choice. As people around the globe become better educated and more affluent, their tastes diverge"* (de Mooij, 2011 p.6).

In light of further technological developments, the researcher argues that these points support both de Mooij and Levitt's views. For it is now possible to offer customised, high quality and low-price offerings. Furthermore, if profit maximisation is taken to be a socio-culturally centred value calculation, as opposed to a reducible financial value: then humans can be viewed as collective individuals, who balance rationality, emotions – and that these form the essence of cultured human existence.

However, whilst apparent inconsistencies between attitudes and behaviour may still exist between individuals across cultures, Ajzen (1988) finds that these will

often be explicable due to multiple individual attitudes linked to particular behaviours. In addition, it becomes clear that separating concepts of culture and social systems is problematic. Instead, Smith and Bond (1998) suggest that viewing culture as a *relatively organized* system of shared meanings is more conducive (p.39).

According to Liu and Yang (2009), historically, brands have used a 'top-down', 'board level' approach when disseminating brand personas and 'big ideas'. Now more brands are adopting 'bottom up', 'employee level' approaches (Liu and Yang, 2009). In appraising such standpoints collectively, they have drawn the researcher towards a top-down, bottom-up approach - from the outside-in. Here the significant majority: society, consumers and non-consumers affect the way in which brand managers perform and think. Here, the most significant unit of cultural analysis is *time,* which is: contextual, specific, perishable, and dynamic. Furthermore, the concept of time held to be emotional and therefore subjective. This unit of time is a rate-determining step, as defined by collective individuals' implicit and explicit shared value systems. Therefore, is likely to be a blended, or hyphenated construct. For example, national cultural identity may mean more in some contexts than organisational culture. In addition, even with a branded national identity, it may comprise of or be supported by other national identities, as stated by Hofstede (1994) and Minkov and Hofstede (2011). Further to this, the most incisive and meaningful components of culture appear to be rooted in largely implicit drivers, which can lead to complications. The utilisation of these valuable cultural traits also in turn hinges on the successful acquisition of tacit knowledge. Therefore, a critical success factor rests in managing the transfer of this knowledge. Nonaka (1991), when looking at how tacit knowledge can be converted into the explicit, suggests that it is a process of, "finding a way to express the inexpressible." In addition, it is argued that meaningful tacit knowledge is perishable and therefore subject to time. It appears that a way of staving off cultural perishability can be through the transmission of cultural heritage.

2.6.2 Socio-Anthropological perspective

As the cultural approach to branding champions an anthropological approach, this will now be investigated further. Ember and Ember (2007) suggest that the everyday usage of the term *culture* refers to a desirable quality, which is acquired. However in contrast, Linton (1936, 1945) argues that culture is the total way of life, rather than those parts, which are regarded by society as being higher and most desirable. Similarly, Usunier (2000) views culture as a *collective fingerprint,* where:

- Culture is the domain of pure quality
- Culture is a set of *coherent* elements
- Culture is entirely qualitative
- There are no 'good' and 'bad' elements of a particular group
- And therefore can be no *globally* superior or inferior cultures

(p.9). These are taken as being a cue towards researching the chosen field of study using qualitative methods. Furthermore, they signal a departure of the cultural approach to branding away from hard-factors, which seek to rank and classify culture according to good and bad. Rather it is argued that cultural brand managers look for commercial fertile soil, battlegrounds and fallow fields of:

- Inclusion and Exclusion
- Consensus and Contention
- Orthodoxy and Heterodoxy
- and Evolution and Revolution.

Evidence for this lies in the examples provided by Klein (2000), Holt (2002b), Fournier and Lee (2009), and Fournier and Avery (2011) – who support their conclusions with examples of where brands cause contention, experience unexpected receptions, lose control, and fail.

Harris and Johnson (2007) point to culture being governed by socially acquired lifestyle traditions, patterns and repetition. In addition, they go onto assert that culture is governed by both *society* [organised groups, who depend on each other] and *subcultures* [members who share certain cultural features that are significantly different from the rest of society]. From a branding perspective, as brands are commercial and competitive entities, it is argued that Ember and Ember's, and Harris and Johnson's definitions are of relevance to the cultural

approach to branding. However, they change the way in which more traditional economic approaches to markets and brands are interpreted.

Kottak (2008) introduces the subject of culture through asking a series of key questions, as to whether *Culture* is:

- Learned
- Shared
- Symbolic
- Governed by biology and nature
- All-Encompassing
- Integrated
- Adaptive or Maladaptive
- About a *system* or the *individual* – as an agency and in practice

And whether the various cultural levels are:

- Universal and Generalizable
- Peculiar, offering patterns, traits and features
- Producing mechanisms of cultural change
- Affected by, or affecting Globalisation

Adopting Kottak's (2008) approach to questioning has been key throughout this thesis. Firstly, they have been used when generating focal theory. Secondly, grounded theory, the Socratic elenchus and the Expert Delphi instrument have been designed to extract further perspectives from participants, through using iterative hermeneutical cycles. In addition, the applicability of Kottack's cultural questions to branding appears to be entirely appropriate – as the same questions prevail, when attempting to understand brands.

In adopting a cultural anthropological approach to branding, the researcher considered the work of Scupin (2006), which suggests that the role of the cultural anthropologist is to focus on cross-cultural aspects of ethnographic data - produced by individual ethnographic studies and participant observation methods. These are in order to produce cross-cultural generalisations about humanity and cultures everywhere. Harris and Johnson (2007) make a distinction between:

- *Ethnography* - a first-hand description of a living culture, based on personal observation; and
- *Ethnology* - the understanding of thought and behaviour that occur in a number of societies.

Building on this, Harris and Johnson (2007) classify anthropological investigative approaches into:

- *Humanistic* - describing and interpreting each culture in its own terms – as comparisons distort the unique qualities of a given culture; and
- *Scientific* - aiming to explain cultural differences and similarities – as regularities exist across cultures.

Such approaches the researcher argues encapsulate how he has sought to understand brands. Furthermore, he observes that brands attempt to bind consumers and stakeholders together under these anthropological paradigms.

When considering more contemporary approaches to *Cultural Theory,* McGowan (2007) introduces the subject with a narrative summarising significant phenomena of the past decade. Within this narrative, McGowan emboldens the following key terms:

- The Other
- Signs
- Signification
- Disavowal (denial of responsibility)
- The Imaginary
- The Uncanny
- Immanentism (existing or operating within)
- Textuality

These McGowan sees presenting a landscape of a *poststructuralist* pathway – where culture is thought of as an effect of systems of meaning, rather than self-evident truths. From these, culture is analysed according to:

1. Textuality and Signification
2. Aesthetics
3. Ethics
4. Alterity (otherness)
5. The Real
6. The Inhuman

And therefore it is argued that,

> *"the apparent effect of a paradigm of thought is not fixed for all time, it seems important also to continue to subject the thinking we do in cultural criticism to its own on-going and perhaps ceaseless interrogation"* (McGowan, 2007 p.142).

BBC News (2011) reports how more recently academics and anthropologists are reinterpreting existing socio-anthropological principles, in response to radical changes in human existence. The key topic triggering the article is the current

financial crisis.[2] Furthermore, a significant factor is that *brands* are singled out as being agents of change, influence; and social influence, capital and climbing. In addition, Trompenaars and Hampden-Turner (1994, 2009); Liu and Mackinnon (2002) and Wilson and Liu (2011) articulate that capitalism is not a monolithic universal. Rather, there are varying culturally-rich perspectives. These in turn yield differing interpretations and executions from engaged leaders and managers. As an extension, it appears that brands largely as badges of capitalism exhibit similar traits.

Dove-tailing with the BBC News (2011), Storey (2009) argues that

> *"all basic assumptions of British cultural studies are Marxist. This is not to say that all practitioners of cultural studies are Marxists, but that cultural studies is itself grounded in Marxism"* (p.xvi).

Storey also cites Hall (2009) as providing a dominant working definition of cultural studies, where Hall draws from Russian theorist Valentin Vološinov. Storey's focus is popular culture and he presents a construct, which sees culture intricately linked with ideas of civilisation, politics and power. Whilst his book singles out British culture, it is argued the underlying assumptions are that popular culture is being shaped and spearheaded by English language, and as extension Western influence.

However, it is noted that viewing cultural dominance as being subject to capitalism is not a new perspective. In 1377, classical North African Islamic Scholar, Ibn Khaldun, wrote *The Muqaddimah* [Translated as: *Introduction to Universal* History] (Referenced translated version as, Ibn Khaldun, 2005). Adair (2010) acknowledges that Ibn Khaldun is considered by many Western writers as the 'Father of Sociology'. Ibn Khaldun argues that people fall into two general categories: (1) city dwellers, who enjoy an urban sedentary lifestyle; and (2) those

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[2] BBC News (2011) writes that,

> *"As a side-effect of the financial crisis, more and more people are starting to think Karl Marx was right. The great 19th Century German philosopher, economist and revolutionary believed that capitalism was radically unstable... (He) viewed capitalism as the most revolutionary economic system in history, and there can be no doubt that it differs radically from those of previous times. Hunter-gatherers persisted in their way of life for thousands of years, slave cultures for almost as long and feudal societies for many centuries. In contrast, capitalism transforms everything it touches. It's not just brands that are constantly changing. Companies and industries are created and destroyed in an incessant stream of innovation, while human relationships are dissolved and reinvented in novel forms. Capitalism has been described as a process of creative destruction, and no-one can deny that it has been prodigiously productive... More and more people live from day to day, with little idea of what the future may bring..."*

who live in harsh nomadic conditions. He goes on to suggest that urbanisation changes tastes and encourages fashionable cultural consumption. By-products of urbanisation are the movement away from functionality in favour of increased emotive consumerism, beyond basic physiological requirements; and the romanticisation of harsh non-urban conditions as a source of storytelling and heritage. This construct charts the antecedents of how branding and culture have increased in significance, within the psyche of modern civilisations.

Furthermore, when considering Eastern schools of thought, Said (2003) [first published in 1978] argues that exoticising and romanticising of the *Other* has been central to Western thinking and has been used as a tool for cultural imperialism, which he terms *Orientalism*. Buruma and Margalit (2004) present an alternative perspective, namely *Occidentalism,* which charts the fear of the West. Interestingly, Buruma and Margalit assert that,

> *"It is indeed one of our contentions that Occidentalism, like capitalism, Marxism and many other isms, was born in Europe, before it was transferred to other parts of the world. The West was the source of Enlightenment and its secular, liberal offshoots, but also of its frequently poisonous antidotes"* (p.6).

The researcher decided to give consideration to the roots of East-West constructs, as they are central to business and management research and practice. Literature frequently frames management practices and branding approaches as such. Furthermore, rather than this being the just the practice of groups labelling an 'other', it is also taken as a positive assertion of their own attributes, thinking, values and approaches - which are often linked to heritage antecedents.

Collectively the points and issues raised in this section have guided the researcher towards appreciating that the study of culture is heavily influenced by:

- The heritage of the researcher
- The ability and opportunity to observe artefacts and participants
- Time
- Commerce
- Economic might - which both provides a platform for cultural dominance and indirectly affects what dominant schools of thought remain available
- The attempt to separate, categorise and delineate
- Iterative hermeneutic cycles of investigation and understanding

Having considered the common ground between cultural anthropology and branding, and from a wider perspective capitalism, the next section considers further emerging perspectives on making sense of culture – through consumption.

2.6.3 Consumption-based perspective

Baudrillard (2005) seeks to understand objects not by their functions or categories, but rather by analysing the process where people relate to them and subsequently the systems of human behaviour and relationships. This appears to support the idea of socio-anthropological analysis of cultural artefacts. Derrida (2005) writes that relationships are best understood through considering the politics of friendships, which in the context of this study is termed *stakeholder relations*. As cited by Baudrillard and Derrida, the researcher has also taken this as a cue to examine Platonic [by Baudrillard] and Aristotelian [by Derrida] schools of thought for further conceptual arguments. For the purposes of the thesis, the researcher extends the definition of an 'object' to brands; and frames the system of human behaviour and relationships to meaning *culture.* Baudrillard states that traditionally, technology views objects as having *essential* and *inessential* structures and functions. In addition, he suggests that objects have a 'language' and 'speech' of sorts.

More than ever, objects are being synthesised to transcend both essential and inessential spheres – and so the separation of these structures is becoming progressively indistinguishable. An example, which he considers, is the car engine. Functionally, an engine has to serve a purpose. However, engines are tuned according to acoustics, which evoke psychological feelings of 'sportiness', for example. Also, furniture and interior decorations comparably fulfil emotional values, which are termed *presence.* Baudrillard also goes further, by considering *gadgets,* arguing that in the strictest sense whilst they are objects of desire for many, they actually often fail to fulfil meaningful and sustained functional value. Objects, from Baudrillard's perspective have a primary function of personifying human relationships, *"to fill the space that they share between them, and to be inhabited by the soul"* (p.14). Therefore, it is agued that brands are designed in the same manner, as objects and or gadgets. And, as will be discussed, branded

commodities, such as denim jeans, are being cultured to fulfil wider-ranging cultural obligations.

When examining culture and consumption McCracken (1990) broadens the definition to include the processes by which consumer goods and services are created, bought and sold. McCracken (1990b) asserts that,

> *"the social sciences have been slow to see this relationship, [between culture and consumption], and slower still to take stock of its significance. They have generally failed to see that consumption is a thoroughly cultural phenomenon...consumption is shaped, driven, and constrained at every point by cultural considerations. The consumer goods on which the consumer lavishes time, attention, and income are charged with cultural meaning. Consumers use this meaning to entirely cultural purposes"* (p.xi).

McCracken (1990b) also cites the postmodern phenomenon of *Diderot effect,* which asserts that cultural consistencies exist when a collection of consumer goods are ascribed a characteristic meaning. An example, which McCracken provides, is of 'yuppies' that consume *BMW, Burberry,* and burgundy wine. However, further to this, the researcher also observes how the Diderot effect conceptually appears now to be a truism, but this does not gift full brand control to marketers. As has been highlighted earlier, there are examples that highlight how such effects also yield unexpected mutations and exhibit revolutionary traits. More recently, McCracken (2008) observes that a postmodern society culture is founded in transformational activities:

> *"it is possible we are witnessing the creation of a global self and an expansionary individualism...Individuals claim many identities and a certain fluidity of self – this much is accepted by postmodern theory. (We now accept that identity has less and less to do with things that remain identical)"* (p.293-294).

As has been asserted by the researcher previously, brands are swept up in this wave of transformational activities – especially as they possess identities and human traits; seek brand extensions; and are central to consumption, culture and consumer identities. Gilmore and Pine II (2007), ascribe this movement in business, which is consumer-driven, to the pursuit of *authenticity.* With such informed and individualistic consumers and stakeholders, McCracken (2009) argues that living, breathing corporations can maintain success, relevance and control through appointing *Chief Cultural Officers.* In McCracken's thesis he highlights that cultural understanding is of the utmost importance to brands; and

that if understood fully, brands will resonate so strongly that they become part of the cultural fabric of society. A focus in this thesis is to explore if culture in fact is as central to branding, from the panellists' perspective and whether their cultural understanding has any bearing on their views.

Perhaps a case in practice which best encapsulates the dynamics of cultural consumption and branding lies in the on-going project launched by Miller and Woodward (2007), dedicated to understanding the phenomenon of *Global Denim,* which highlights paradoxes in global consumption patterns and how consumers are reconciling their position in cross-border societies[3].

Going into more detail, Miller (2011) has also researched sub-cultures and religious groups who previously have been thought not to converge in their appetite for mainstream branded global consumables: as the marketing communications, associated symbolism and functional design attributes of products have been seen to be at odds with those individuals[4].

Staying on the subject of fashion, Tungate (2010) suggests that luxury used to be accessible only to an elite group. However, now high-street brands, notably *Zara, Topshop* and *H&M* have put fashion in the reach of everyone.

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[3] The Global Denim Project (2007) reports that: *"We regard denim as an example of the 'blindingly obvious', something so taken for granted we fail to appreciate the fact that one particular textile should come to dominate the world when there are so many other choices. Although there is designer denim, most of this expansion has been cheap denim, and given that the dominant style has changed little in over a century, denim's triumph must be as much despite commerce as because of it...the fact that blue jeans are the only garment commonly sold as distressed, that it has become the default choice when people are worried what to wear, that is the worlds most ubiquitous garment and also often the most personal, are not a coincidence. It is the combination of these points that help towards an explanation in general terms of how people use denim as part of their struggle to reconcile the universal and intimate aspects of their lives"* (online).

[4] Miller (2011) argues that: *"Blue Jeans represent a paradox with respect to the project on modest fashion. On the one hand there are many examples of religious organisations such as ultra orthodox Jews banning blue denim as immodest, and yet I will argue they [blue jeans] have today a greater capacity for modesty in the sense of self-effacement than any other garment in the world. As such they draw attention to two very different meanings of the word modesty. One concerns the exposure of the female body and the other concerns invisibility."*

Offering a marketing perspective, Koshy (2010) talks of a brand being:

1. The offspring of an organization's leadership
2. Constituting a promise given to consumers
3. An 'affordable luxury'
4. And offering 'mass prestige'.

In addition, sports brands such as *Nike, Adidas, Puma,* and *Reebok* have transformed their brand image from practical sportswear into 'hip fashion', even attracting customers that have no interest in sport. Kapferer and Bastien (2010) assert that when considering brand equity, there is *"No luxury without brands"* (p.116). In keeping with these examples, the consumption approach to human existence – and also harmonising traditional economic marketing thought: it can be said that civilisation and urbanisation drives the consumption and the concept of living in luxury. It is also apparent that luxurious consumption is that which is branded. However, what has changed are concepts of value, premium, quality and prestige – which are no longer on a linear scale. Furthermore, it appears that brands are playing a part in influencing culture.

It is argued therefore that the work of Miller and Woodward (2007), through cultural anthropological analyses of phenomena, are highlighting that cultural insight can be unearthed through the observation of participants' consumption of commodities, and as an extension brands. Furthermore they appear to support the point made by de Mooij (2011) earlier – that, *"Instead of causing homogenization, globalization is the reason for the revival of local cultural identities in different parts of the world."* (p.5). It would also appear that with branded denim being sold at a high price tag - whilst looking old, worn and distressed (an approach championed by *Diesel),* indicates that brands and commodities are attempting to embed themselves seamlessly within existing cultural usage, whilst also commanding a premium for the privilege. It is this embedding process which is helping to support the argument that brands are orchestrating many aspects of modern culture, as opposed to 'hitting notes' in pre-existing cultural musical scores.

2.6.4 Establishing a cultural branding lens

In discussing the adopted cultural lens of analysis in this section, it is argued that the starting point in this thesis for analysing brands, culture and their management, is from a position where brands are now influencing culture. To what degree will be investigated through raising the question with the panel of experts in the Delphi study.

As has been asserted, Ember and Ember's (2007), and Harris and Johnson's (2007) definitions of culture, are of more relevance from a branding perspective - as brands are commercial and competitive entities. However, in the interests of eliciting greater knowledge from the research study and panellists, Usunier's (2000) view of culture as a qualitative *collective fingerprint,* has been used as a guiding principle. Where:

- Culture is the domain of pure quality
- Culture is a set of *coherent* elements
- Culture is entirely qualitative
- There are no 'good' and 'bad' elements of a particular group
- And therefore can be no *globally* superior or inferior cultures

Further to this, the researcher will allow panellists to define what cultural unit of analysis appears to be of most significance. Namely, what level of culture is most critical. Therefore, rather than overtly stating Hofstede (1994) and Minkov and Hofstede's (2011) levels of human endeavour, grouped according to:

1. National level
2. Regional and or/ethnic and/or religious level and/or linguistic affiliation level
3. Gender level
4. Generation level
5. Social class level
6. Organisational or corporate level

the researcher used these as cues for his own analytical purposes.

Finally, drawing from Baudrillard's (2005) perspective on objects; and McCracken's (1986, 1990a, 1990b, 2008, 2009) position on transformational individualism concerning cultural consumption: culture and brands have a primary function of personifying human relationships, *"to fill the space that they share between them, and to be inhabited by the soul"* (Baudrillard, 2005 p.14). Therefore, the lens of analysis occupies a postmodern socio-cultural

anthropological position: in trying to understand the language of brands, culture and their consumers, using qualitative methods, which capture the real world as they see it. To this end, a key area of investigation is examining both: what impact culture is having on branding; and reciprocally, what impact branding is having on culture. From this a model for the 'cultured' management of cultural brands in a cultural environment can be developed and investigated.

2.7 Discovery of an emergent sub-category: The cultural consumption brand stakeholder

Having selected a lens of analysis, mapped an exhaustive review of literature to the lens and undertaken a calling of the lens, through critical reviews and cross-mapping: the next stage of the background theory culminated in the researcher arguing for the need to extend and refine the initial lens. This signalled further contributions to knowledge in the background theory chapter - in proposing a new school of thought and identification of an emergent pattern within the literature. Findings suggest that literature follows a cyclical process of discovery and knowledge building, which have been used as a basis for constructing a new and emergent school of thought - which harmonises and synthesises existing principles.

2.7.1 Brand performance according to communication exchanges

As has been discussed in the previous sections on brands and culture, it is clear that calculating the value of a brand and how brands communicate with stakeholders, are performance indicators. Behind this Holt (2004) holds that brand performance is assessed according to a brand's ability to act as a container for an identity myth. Holt asserts that successful brands perform myths that address an acute contradiction in society (p.14). From this, the language of brands and their targets, culminating in brand storytelling, is central. This storytelling then buttresses the identity of both the brand and associated consumer. Matthews and Wacker (2008) suggest that stories are a universal human common denominator. They also observe that businesses knowingly or not engage in a great deal of storytelling. Acutely, Matthews and Wacker (2008) find that brands and businesses, which engage in myths, by utilising them as a

positive tool, are afforded more success. Further to this, they offer a cursory note articulating that those who view business outside of the domain of *culture* often translate into executing fatally flawed judgement (p.13).

From this cultural approach it is clear that economics are anthropologically based; and transactions are being pushed towards psychoanalytical constructs – both indicating performance according to a relationship exchange. Therefore, the value of a brand lies in its ability to sustain communication.

2.7.2 Cultural consumption approach to brand stakeholders

Having identified that there is a common thread throughout all of the respective brand schools of thought - which attempts to position and evaluate brand stakeholders according to communication; this section presents an overview of stakeholder analysis, which focuses attention on the role of external stakeholders. This is in line with more consumer-centric brand approaches and following the increase in two-way media communication channels - which are both creating new stakeholders, and broadening the field of study.

Freeman (1984) defines a stakeholder as being *"any group or individual who can affect or is affected by the achievement of an organisation's objectives"*, (p.46). It is worth noting that brands with duplicitous transient and transcendent attributes push stakeholder analysis towards more figurative, tacit and implicit states, demanding the inclusion of additional parties - due to their influence. Furthermore, brands require analysis that reflects this departure from purely economic value drivers.

Following Freeman's (1984) definition, Mitchell, Agle and Wood (1997) state that stakeholders can be identified as being,

> *"primary or secondary stakeholders; as owners and nonowners of the firm; as owners of capital or owners of less tangible assets; as actors or those acted upon; as those existing in a voluntary or an involuntary relationship with the firm; as rights-holders, contractors, or moral claimants; as resource providers to or dependents of the firm; as risk-takers or influencers; and as legal principals to whom agent-managers bear a fiduciary duty"* (pp.853-854).

Within the extensive list of identifying factors provided by Mitchell, Agle and Wood (1997) appears a construct, which seeks to classify parties according to a scale of:

(1) Ownership of associated assets

(2) Participatory positive/neutral/negative relationships

(3) Propensity to influence positively/negatively

(4) Reciprocal duty, trust and confidence.

[Figure 2]

Stakeholder Typology
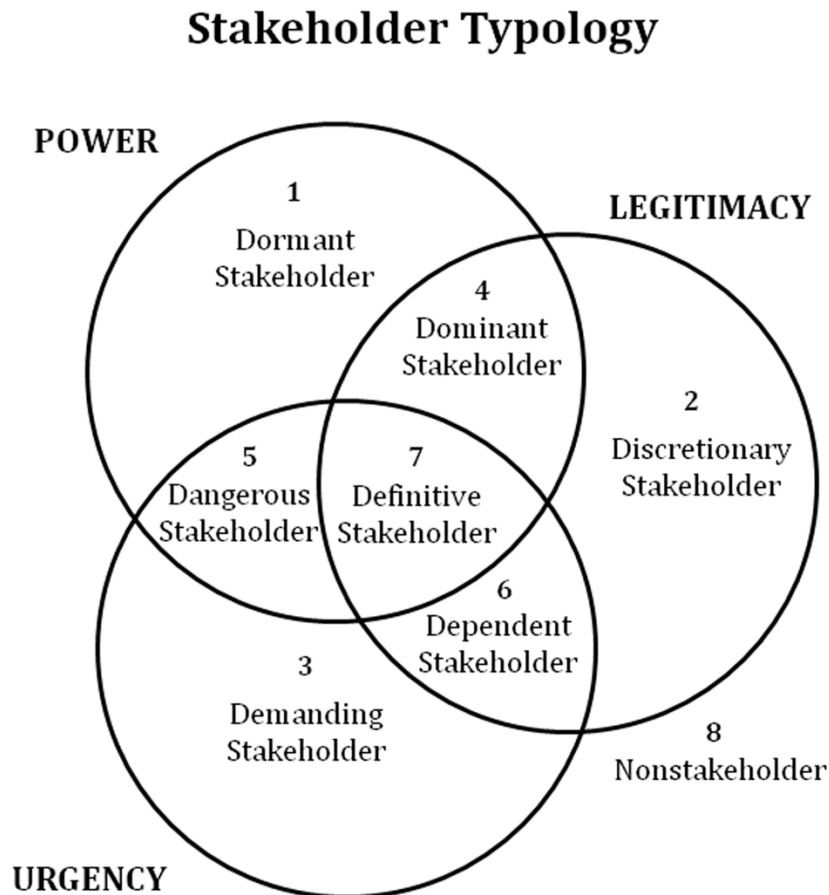
Figure 2 Stakeholder Typology: One, Two, or Three Attributes present" (Mitchell, Agle and Wood, 1997 p.874)

Other perspectives suggest:

- Stakeholders are usually regarded as targets rather than partners, as traditional approaches focus on the needs of the owner and the effects on their brand (Gregory, 2007).
- External stakeholders become more crucial in relational and community-based approaches (Heding, et al, 2009).
- Each stakeholder group should be communicated to in different ways, as a reflection of their differing needs (Roper and Davies, 2007).

Windsor (1992) highlights that broad or narrow views of stakeholders' universe effects the way in which they are defined and subsequently classified. The

Freeman (1984) definition takes a broad view, suggests that *"companies can indeed be vitally affected by, or they can vitally affect almost anyone"* (Mitchell, Agle and Wood 1997, p.857) whilst that expressed by Freeman and Reed (1983) in parallel is narrower, focussing on those whom an organisation is dependent on *"for its continued survival"* (p.91).

Clarkson (1995) suggests that "corporations manage relationships with stakeholder groups rather than society as a whole" (p.92) and that stakeholders' interests may be towards past, present, or future corporate activities (p.106). He also asserts that the term *"stakeholder* is not synonymous with *shareholder"* (p.112). Following this, Clarkson (1995) classifies stakeholders into *primary* and *secondary* groups. Primary stakeholders are defined as being those "without whose continuing participation the corporation cannot survive as a going concern" (Clarkson 1995, p.106). Clarkson (1995) states that they "typically are comprised of shareholders and investors, employees, customers, and suppliers, together with what is defined as the public stakeholder group" (p.106). Secondary stakeholders according to Clarkson (1995):

> *"are defined as those who influence or affect, or are influenced by, the corporation, but they are not engaged in transactions with the corporation and are not essential for its survival... They have the capacity to mobilize public opinion in favor of, or in opposition to, a corporation's performance" (p.107).*

Having collated and grouped the literature [Tables 2, 3 & 4], and subsequently reviewed the themes, areas of consensus and contention critically; the next section presents how the themes have been conceptually mapped to identify a prevailing trend [Table 5]. This is in response to an identified need for extending the lens of analysis. Following this an emergent approach to brand management is presented, which builds on the concept of brand stakeholders and communication [Tables 6 & 7].

Central to this approach is the idea that control remains a management imperative. However, due to significant factors which draw control away from brand managers; such as social media, hypercommunication, information democratisation, consumer savvy and power: control can only be attained through reciprocity. Furthermore, with globalisation: brand management and encoded messages have to embrace pluralism. A way of unifying and ratifying

consumer empowerment lies in initiating or providing viral messages. Through this, control is achieved using soft power. Such communication necessitates collaborative and iterative complex messaging, designed to spread through social networks. Therefore cultural brand communication drives stakeholder engagement, which is designed to increase consumption – both of tangible and intangible core, secondary and augmented commodities. The method for analysing such an approach necessitates a blend of anti-positivist postmodern anthropological marketing, Gestalt and social network analysis.

Brands rely on stakeholders to their ascribe meaning and value. However it can also be argued that brands are the glue that binds stakeholders together – and therefore a relationship of symbiosis and reciprocity exists. Research undertaken by Fiedler and Kirchgeorg (2007) supports the view that as stakeholder groups are identified: *"the attributes differ substantially among customers, employees, shareholders and journalists"* (p.183). This correlates with Jones (2005) view, where he seeks to arrange internal and external stakeholder groups around a brand centred "daisy wheel" (p.18); which is also termed as a hub-and-spoke model by other sources. In contrast, Bhattacharya and Korschun (2008) assert that

> *"Much of the current thinking in stakeholder theory is still tied to the classic hub-and-spoke model, in which stakeholders are distinct and mutually exclusive. However there is a growing consensus that a firm's constituents are actually embedded in interconnected networks of relationships through which the actions of the firm reverberate with both direct and indirect consequences"*, (Bhattacharya and Korschun 2008, p.113).

Therefore, they suggest that *"one urgent need involves frameworks that identify key stakeholders and describe their motivations for collaborating with the firm"*, (Bhattacharya and Korschun 2008, p.116).

Brand Approach							
Emerging school of thought	Economic	Identity	Consumer-based	Personality	Relational	Community	Cultural
Dominance and Prominence	Before 1985	Mid-1990s	1993	1997	1998	2001	Around 2000-2006
Keywords	Economic man, transaction theory, marketing mix, 4P's	Corporate branding, identity, organizational culture, vision, image •Identity commoditisation	Consumer-based brand equity, brand image, brand associations	Brand personality, self, archetypes	Dyadic brand-consumer relationship, brand relationship quality	Brand communities, brandfests, the brand triad, the internet	Globalization, popular culture, brand icons, No logo
Managerial imperative	Control (hard power)	Monologue, evangelism, exemplar	Programming	Symbolic exchange •Dynamism and time specificity	Friendship, loyalty	Discretion, Social responsibility	Bird perspective, apolitical
Brand perspective	Functional	Corporate	Cognitive psychology	Human •Personification	Human	Social	Cultural
Consumer perspective	Economic man	Stakeholder *Signal of wider dependency	Computer, savvy	Psychological	Existential being •Esoteric	Tribe member	Homo mercans (market man)
Marketing landscape	"Traditional" marketing, 4 P's	Organisational identity, corporate identity, image, reputation	Cognitive psychology, the information-processing consumer	Personality, consumer self, brand-self congruence	Animism, relationship theory	Community theory subcultures of non consumption	Cultural consumption, No logo, the citizen brand prospect
Scientific tradition	Positivism /empiricism	Socio-economic constructivism /interpretivism •Postmodernism and deconstruction drivers	Cognitive psychology	Human personality psychology	Existentialism, phenomenology	Anthropology, micro-perspective	Cultural studies
Methods	Scanner panel data, laboratory settings, quantitative	Organisational culture studies and organizational values, Heuristic methods, storytelling	Cognitively based association maps, interviews, projective techniques	Mix of qualitative and quantitative methods, scaling techniques •Increased complexity, technology and software	Depth interviews, life story method	Ethnography, netnography	Macro-level analysis on microlevel data
Brand value paradigm	Marketer → Consumer	Marketer → Consumer	Marketer ← Consumer	Marketer ↔ Consumer	Marketer ↔ Consumer	Marketer / Cons. ↔ Cons.	Marketer ↔ CULTURE ↔ Consumer

Table 5 Conceptual trend mapping of the brand management schools of thought
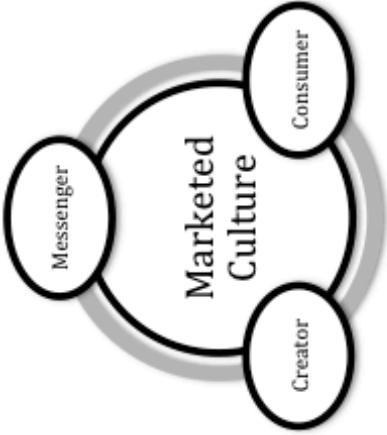
Emergent Brand Approach	
Cultural Consumption-based Stakeholder	
2006-2011	
Keywords	Authenticity, user-generated content, customisation, extension/stretching, branded individuals, brand vocabulary, virtual reality
Managerial imperative	Control (soft power), viral messenger, pluralistic: through reciprocity
Brand ideal *Inside-out [micro]*	Multi/Cross/Sub-Cultural artefact of desire
Consumer ideal *Outside-in [macro/mezzo]*	Gatekeeper, collaborator, actor
Marketing landscape	Information exchange, economic reciprocity, conspicuous consumption, social networks, neo-spiritualism, innovation/hybridisation, convergence
Scientific tradition	(Post)postmodern marketing anthropology, Gestalt psychology
Methods	Social network and transactional analysis, socio-cultural ethnography, hermeneutical reflexive iterations
Brand value paradigm	

Table 6 and Figure 3 Emergent approach to brand management

Seminal conceptual texts	Linton (1936)(1945), Lewin (1947), Kroeber and Kluckhon (1952), Nagashima (1970), Olins (1978)(1979)(1989)(2001), Sirgy (1982), Friedman (1986), McCracken (1986)(1990), Aizen (1988), Belk (1988), Doyle (1989)(1994), Aaker (1991)(1996)(1997), Batra and Ahtola (1991), Elliot and Roach (1991), Featherstone (1991), Fournier (1991)(1995)(1998a)(1998b), Nonaka (1991), Grunig (1993), Keller (1993)(1998)(2003a)(2003b), Dawar and Parker (1994), Hofstede (1994), Miller (1995), Frank (1997), Hatch and Schultz (1997), Maklan and Knox (1997), Elliot and Wattanasuwan (1998), Christensen (1999), Hanby (1999), Helman and de Chernatony (1999), Dye (2000), Klein (2000), Usunier (1996)(2000), Aaker et al (2001), Brown (2001), Collins (2001), de Chernatony (2001), del Rio, Vazquez and Iglesias (2001), Franzen and Bouwamn (2001), Hill and Lederer (2001), Ind (2001), Lelyveld (2001), Muniz and O'Guinn (2001), Ries and Trout (2001), Holden (2002), Holt (2002)(2004), Kozinets (2002a)(2002b), Brown et al (2003), Czellar (2003), Hatch and Schultz (2003), Keller (2003), Lievens and Highhouse (2003), Aaker et al (2004), de Chernatony and Drury (2004), Gong et al (2004), Miles and Mangold (2004), Barrow and Mosley (2005), Karmark (2005), Lindstrom (2005), Vallister and de Chernatony (2005), Wipperfürth (2005)
Key texts (2005-2011)	Baudrillard (2005), Derrida (2005), Freling and Forbes (2005), Lindstrom (2005), Keller (2005), Muniz and Schau (2005)(2007), Allen et al (2006), Askegaard (2006), Hayes et al (2006), Madden et al (2006), Schroeder and Salzer-Morling (2006), Aaker (2007), Olins (2007), Monga and Lau-Gesk (2007), Swaminathan et al (2007), Whitelock and Fastoso (2007), Ember and Ember (2007), Gilmore and Pine (2007), Muniz and Schau (2007), Miller and Woodward (2007), Whitelock and Fastoso (2007), Allen et al (2008), Fehle et al (2008), Fournier et al (2008), Keller et al (2008), McCracken (2008), Pringle and Field (2008), Matthews and Wacker (2008), Strizhakova et al (2008), Till and Heckler (2008), Carassa and Colombetti (2009), de Chernatony (2009), Fournier (2009), Fournier and Lee (2009), Hall (2009), Heding, Knudtzen and Bjerre (2009), McCracken (2008)(2009), de Mooij (2010), Holt and Cameron (2010), Kapferer and Bastien (2010), Laforet (2010), Tungate (2010), Fournier and Avery (2011a)(2011b)

Table 7 Key and supporting texts used to identify a new school of thought

As mentioned, Mitchell, Agle and Wood (1997) classify stakeholders according to their *power, legitimacy and urgency,* grouping them accordingly. From their literature search they cite that legitimacy is rooted in either some form of contractual relationship, or desirability. However, brand literature, and especially that in the community and cultural schools, point to brand stakeholder interplay, defined according to legitimacy is problematic - as it is self-governed, self defined and difficult to regulate. Furthermore, desirability may not be experienced by all associated parties, nor might formal contractual relationships exist. An example of this occurs when observing the prominence of the self-elected anti-branding and no-Logo movements that have been able to exert their influence (Klein, 2000; Holt, 2002b). Furthermore when examining the issue of power it might help to think of the analogy of rugby players – where a large slow heavy player, or a small fast light player, may both be able to generate the same amount of impact in a contact situation; but their power is used in different ways and has a different effect. In the same way the power of a stakeholder will differ and will be effectual in specific situations.

Wolfe and Putler (2002) mention that stakeholder analysis tends to rank groups primarily according to role, which they feel is not a problem when stakeholders have a similar priority. However difficulties with this perspective occur in situations *"in which self-interest is not the primary motivator of individuals' priorities"* (p.64). For these reasons Wolfe and Putler (2002) draw from customer segmentation literature and propose an approach which accommodates *"heterogeneous priorities within role-based stakeholder groups"* (p.64). In a similar thread Miles, Munilla and Darroch (2006) observe that there are increasing examples *"of firms that manage to demonstrate a pluralistic mindset"* with regards an *"ability to provide superior returns to shareholders whilst maintaining a strong CSR profile"* (Miles, Munilla and Darroch 2006, p.203). This seems to suggest that roles can and will shift, and interest groups may oscillate between homogeneity and heterogeneity.

As Gregory (2007) states that *"stakeholders are usually regarded as targets rather than partners,"* in the development of corporate brands; then literature seldom provides guidance on how their involvement can be facilitated (p.59). This is

perhaps reflective of traditional approaches, which focus on the needs of the owner and the effects on their brand. However if stakeholder brand analysis is to reflect the emerging schools of brand thought - such as the consumer, personality, relational, or community based-approaches, as identified by Heding, Knudtzen and Bjerre (2009), external stakeholders become more crucial. Mossberg and Getz (2006) state that some stakeholders (by which they mean non-Owners) demand, *"active participation in the branding process whilst others are not interested in being involved"*. Similarly, Roper and Davies (2007) suggest that each stakeholder group should also be communicated to in different ways, as a reflection of their differing needs.

It is argued that these emerging trends pull the observation of stakeholder groups according to their brand communications and brand message consumption - as opposed to just their more tangible stakes. Furthermore, Bourdieu (1977) discusses the concept of symbolic capital and its accumulation, which manifest in prestige, status and reputation. Following this Pitt et al (2006) suggest that organisations and individuals that give more away, contribute to community, or provide more services *"are held in higher regard and reputation"* (p.124).

Further to this, Payne, Ballantyne and Christopher (2005) state that, *"relationship-based approaches to marketing offer a reformist stakeholder agenda with an emphasis on stakeholder collaboration beyond the immediacy of market transactions"* (p.856).

Johnson (2007) discusses the idea of Stakeholder Relationship Management (SRM) as a *"means to manage, monitor and measure communications and stakeholder relationships"*. However Payne, Ballantyne and Christopher (2005) conclude that their experience of working

> *"with stakeholder models suggests that exchange relationships with many relevant stakeholders are inadequately recognised by and planned for by organisations"*; and *"may not previously have been entirely understood"* - due to *"systemic (or cumulative) effects of interdependencies"* (Payne, Ballantyne and Christopher 2005, p.866).

From this it can be taken that branding attempts to do just this - embedding itself within more and more communities. In doing so brands draw in more stakeholders, ultimately sacrificing power from the hands of the brand owner,

knowingly or not - but as a necessary evil to ensure its success. Brands require the oxygen of communication to survive and therefore depend on their stakeholders to breathe life into them. It then follows that the more stakeholders that exist and discuss a brand's existence: warts and all, the positive and negative - then the longer their life and potentially the more health they will enjoy.

Having raised these points, the following chapter will develop background theory into focal theory, where cultural stakeholder and brand frameworks will be constructed. From these, a research instrument will be designed to gather the opinions from experts, in order to evaluate and subsequently refine the focal theories presented.

2.8 Conclusions

Most recently, over the past decade, it was found that the cultural approach to brand management represents a new school of thought in academic literature, which captures the aims, objectives and practices of brand managers – locally, internationally and globally. This school of thought emerged from relational and community based brand perspectives: which chart the rising role, significance and influence in brand management of connected and savvy consumers.

Brands have gravitated towards a position of offering individual and societal meaning. In doing so they have become cultural artefacts and language shapers. In tandem the conceptual argument for a brand being understood and used as a 'human' has grown in prominence. Collectively, these represent a global cultural phenomenon where the management of brands is a cultural, diffused and self-defined practice.

As brands stretch their remit, they appear to present a market proposition which enhances their efficacy through being viewed and behaving as emotive entities. Furthermore, this appears to pull branding into a dedicated subject discipline, which opposes some more traditional functional marketing frameworks and strategic approaches. This has also taken practitioner and academic thinking into an arena, which attempts to evaluate their nature according to human traits – such as having a personality and engaging in a 'meaningful' relationship. These

have yielded different approaches or schools of thought, which in turn have expanded, nourished and enriched their branded commodities.

Recently, the cultural school of thought embeds brands into a cultural landscape. Even more recently, literature maps brands to social stakeholder networks and this cements them into being both: a cultural artefact central to conveying meaning and reality, and a 'human' collaborator. Furthermore globally: technology, social media and Web2.0 have increased hyper-communication, interactions, and levelled the field of knowledge acquisition - leading to social capital.

A further observation is that several key authors cited in the taxonomy in fact actively publish work, which falls into more than one category, or school of thought. Therefore, five points of reflection have been considered. Firstly, does this point towards one school of thought benefitting one brand, or industry sector. Or secondly, does the management of a brand necessitate a blend of several schools of thought and approaches. Thirdly, are a significant number of academics and practitioners aware of such diversity in theoretical brand approaches, or is it assumed that there prevails one exemplar of brand theory and practice. de Chernatony (2009) talks of the 'Holy Grail' of unifying brand interpretations, which in doing so implies such pursuits are elusive and perhaps even pious. Fourthly, if they are aware, how receptive are these individuals to such diverse or plural approaches to strategic brand management. Or is it rather that the school of thought represents a chosen lens of analysis. Finally, can and should brand activities tend towards a unifying theoretical approach and school of thought.

Building on the body of literature and critical observations, a key area of investigation will be gathering: firstly, data from a spread of brand categories; and secondly, capturing the views of academics and practitioners from culturally diverse backgrounds. Therefore, a way of harmonising these two factors necessitates the involvement of participants; that they have culture and brand expertise; and that they have the opportunity to be exposed and subsequently reflect upon different perspectives.

Literature searches indicated that there is a paucity of empirical data that captures the views of brand managers. Rather the preference appears to be deriving brand meaning from how the brand performs, how consumers behave, or how consumers perceive and consume brands. In response, it is argued that there is a clear need to investigate the nature of the relationship between culture and brands – from the perspective of brand managers. In addition, observations point towards a dominance of publications from 'The West' and western-centric perspectives. However, the researcher also finds 'East' and 'West' terms restrictive in some ways, but their usage and understanding cements them as being constructs which have to be mediated.

What became apparent from the background theory study was that the schools of thought are not so much reflective of a progression and transition of thought as is inferred by literature in general and specifically by grouped schools of thought; but instead the researcher found that they follow a cycle. This cycle appears to be an attempt by stakeholders to establish control through different methods as environmental factors change. However, with an increasing number of significant stakeholders: power, which is linked to control, has to be mediated – making them precarious, temporal and contextual.

Furthermore, the lens used to establish where control lies is subjective and, in places, incompatible with perceptions and definitions of the role and nature of brands and culture. This has lead to the emergence of evolutionary schools of thought in order to establish form and function. Nevertheless, evolution has a genesis: and it is judged that the genesis of being for brands and culture is the role of the human stakeholder; and the progression of them humanising objects and artefacts, such as brands. The identified gaps in the literature are fourfold:

1. Sufficient progression in brand definitions, which capture the full applications and potential of brands in the face of recent societal developments within the same timeframe
2. Sufficient detail as to how human brands are
3. Stakeholder analysis from a brand-cultural perspective, which maps networks of communication and control

4. Guiding principles for brand managers in touch with a global and culturally complex environment.

In response to these findings, the next chapter examines how brand stakeholder relations can be understood: as brands, their creators and consumers are intricately linked through rational and emotional states and touch points, which govern cultural values, attitudes and practices. Based upon a further detailed critical appraisal of the identified gaps within Chapter 3, a focal theoretical framework will be presented.

Chapter Three: Focal Theory

Identifying and examining literature gaps – in order to generate a theoretical conceptual framework, and derive investigative research questions

Chapter 3: Focal Theory - Conceptual Framework

3.1 Introduction

The following chapter firstly considers gaps identified in the literature review in more detail. Having considered the gaps and identified the significant phenomenon, drawing from existing literature, the chapter will then present:

- Conceptual frameworks, which embody this landscape
- A conceptual framework, which forms the basis for analysing the identified phenomenon through research in this study
- A basis for generating research questions, which will shape the methods and nature of the doctoral study.

During the period of doctoral study, some of these areas of gaps were highlighted and addressed within published peer-reviewed journal papers, conference papers and textbook chapters. In exploring supporting areas to the field of study, it became clear that what shapes the central identified phenomenon of the doctoral study is the complexity of the individual and the relationship that they have with brands. These in turn yield a form of hybridisation that has been termed *surrogacy,* which will be explored in more detail in this chapter.

Within this thesis and the creation of a focal theory, the aim was not to summarise the collective pieces of work and different viewpoints having deconstructed them - rather it was to construct a conceptual standpoint and narrative which focuses on the gel which brings together the identified gaps. This is in the interests of presenting a greater depth of understanding of the cultural brand phenomenon.

Second of all, the purpose of publishing was to gain feedback on the identified areas, and also in the interests gaining peer acceptance of both conceptual arguments and academic rigor. For this reason, as the chapter draws from the researcher's own published work, collectively findings have been used to support and refine the focal conceptual argument for this doctoral study. Therefore, this

chapter goes some way towards bringing together preliminary findings and discussions, which will be examined further and developed throughout the thesis.

In addition, as essential part of theory building in grounded theory involves diagram drawing. With this in mind, the researcher wanted to practise conceptual model diagram drawing, which received peer review feedback, rather than as an exercise undertaken informally and in isolation from academic and practitioner communities. Furthermore, this approach bridges the gap between doctorates awarded through a compendium of published work and those through the presentation of one research doctoral thesis – both of which have comparable and unique merits.

3.2 Review of the gaps in literature

Building on the critical background theory review and in particular the body of branding literature presented from Holt (2002a, 2002b, 2004, 2005, 2006); Holt, Quelch and Taylor (2004); Holt and Cameron (2010); Fournier (1991, 1995, 1998a, 1998b); Fournier and Yao (1997); Fournier and Avery (2011a, 2011b); Fournier and Lee (2009); Keller (1993); Klein (2001); Muniz and O'Guinn (2001): it is apparent that cultural and consumer relationship aspects of brand management are increasing in significance, whilst posing challenges to academics and practitioners at the same time. From the researcher's perspective and findings, it would appear that the gaps and challenges can be grouped broadly into two areas. Firstly, what a brand is and how it should be defined; and secondly, significant contributions which take a more emic ethnocentric standpoint that is linked to socio-cultural international brand interactions.

Holt, Fournier, Keller, Klein, Muniz and O'Guinn, each of whom are key figures in current brand management literature, write about the significance of culture and consumers. But it appears that consumers' culture is defined by their brand consumption, and less so by their cultural underpinnings, related to aspects such as: race, ethnicity, religion and national identity. Literature was found to offer knowledge and guidance on brand management, but seldom is empirical data used which captures the views and experiences of brand managers, who are brands' guardians. Furthermore, culture is seen to influence brands, branding

and brand managers – however only recently is the link with culture and brands being researched in more detail, over the past ten years. For example, where and at what level does culture play a part? Often, corporate culture and consumer culture are discussed, with brands being a component – however, the inference is that these are separate types or interpretations of culture. As Brands and Culture are found to be linked symbiotic entities, they mean more that simply business and commerce: as they are human expressions and a means by which individuals communicate, form attachments and build relationships. Therefore, whoever participates and consumes has the potential to derive various forms of value (Fournier 1995, 1998a, 1998b; Fournier and Avery 2011a, 2011b). Managing them is a collective and collaborative diffused obligation, which stretches outside of the hands of their creators (businesses). Brands and Culture are artefacts and fingerprints, as asserted by Holt (2004) and Usinier (2000) - which whilst being linked to a space and time, do have the potential to live on. As they have the potential to live on, it is argued that more future-spective work is needed which appraises: where, to what degree and how. This the researcher argues poses a challenge to existing ontological and epistemological arguments; as a brand should be examined according to two constructs: linked to its commodity and as a conceptual and separate commodity in its own right. The researcher suggests that such a philosophical shift actually follows a cycle of discovery, which takes theory back to the concept of predication defining and explaining phenomena. With this in mind, literature searches on the study of phenomena took the researcher back to the work of Aristotle, which will be discussed later. More recently, Holt's work takes an anthropological and phenomenological approach; whilst Fournier focuses on relationships and where there are areas of contention, or developments linked to phenomena - such as globalisation and technological advancements in social media, which are changing relationship bonds and definitions.

Harmonising these points, the researcher attempted to investigate the gaps through adopting a refinement of Holt's standpoint, which offers a broad-based structure to the findings of Fournier and Klein. The difference in the theoretical underpinning presented by the researcher lies in:

- Moving away from North American centricities, considering other cultures
- Actively seeking to explore ethnocentricities, as linked and separate concepts to race and geographic region
- Exploring the experiences of brand managers, rather than people's experiences with brands
- Introducing the idea of stakeholder analysis, through social networks of communication and influence

Therefore, a key aim in this section was to use their work as a starting point and then map back findings within their frameworks - in order to build greater depth. From this, the generation of a focal theory was attempted.

An essential part of focal theory building in grounded theory methods involves continuous conceptual model diagram drawing throughout the research process. The researcher chose to strengthen the presentation of identified gaps, through using key findings from his own published work - which tested specific aspects of the gaps identified. Rather than being a circular exercise in self-citation, which can be seen as having limitations: instead the aim was to test these specific conceptual arguments, through receiving peer review feedback from academic and practitioner communities. Therefore, in support of the researcher's approach, each of the researcher's papers selected clearly signalled the significance of Holt's work in cultural branding and consumer culture as a starting point. This approach was then used as a platform for building a main focal theory tackling the phenomenon as a whole.

The researcher challenges the normative literature, where it has been identified that there are gaps, which point towards insufficient progression in brand definitions. Whilst a progression in thinking, evident in schools of thought is present, existing definitions fail to capture the full applications and potential of brands, in the face of societal developments within the same timeframe. Furthermore, with the observed humanisation of brands it remains unclear as to how human brands in fact are. Also, with brands becoming 'humanoids', they are now positioned as actors within a stakeholder network, which is a departure from conventional approaches to stakeholder analysis. Stakeholder analysis from a brand-cultural perspective that maps networks of communication and control remains in its infancy. However, there is evidence that the concept is understood

and practiced by brand professionals. Therefore this poses challenges when offering literature-based guiding principles for brand managers. The following sections consider these gaps and conceptual arguments in more detail.

3.2.1 How brands are defined

Within the various schools of brand thought lay areas of contention, concerning how brands can and should be understood. The tables in the background theory chapter indicated how thinking has moved from marketer perspectives, to consumer perspectives, and eventually towards collaborative marketer-consumer perspectives. One of the background theory conclusions was that the schools of thought represent a cycle. In further investigation of this point, Wilson and Liu (2011c) found areas of contention, presented within a perceptual map along two axes: stating firstly, that consumers and marketers, in extreme cases, can be at odds with their implicitly held views and traits; and secondly, theory building, whilst explicit, has a tendency to drift away from the tacit reality of brand meaning. Therefore, it is judged that it is insufficient to assert merely that brands, marketers and consumers are behaving, or can be understood in a different way. Rather, the differing perspectives reflect a higher degree of individual and subject complexity. From this, key considerations of brand practice and theory building have to be how these factors can be mediated in order to generate grounded theories; and brands, which circumnavigate cultural factors to achieve success [Figure 4].
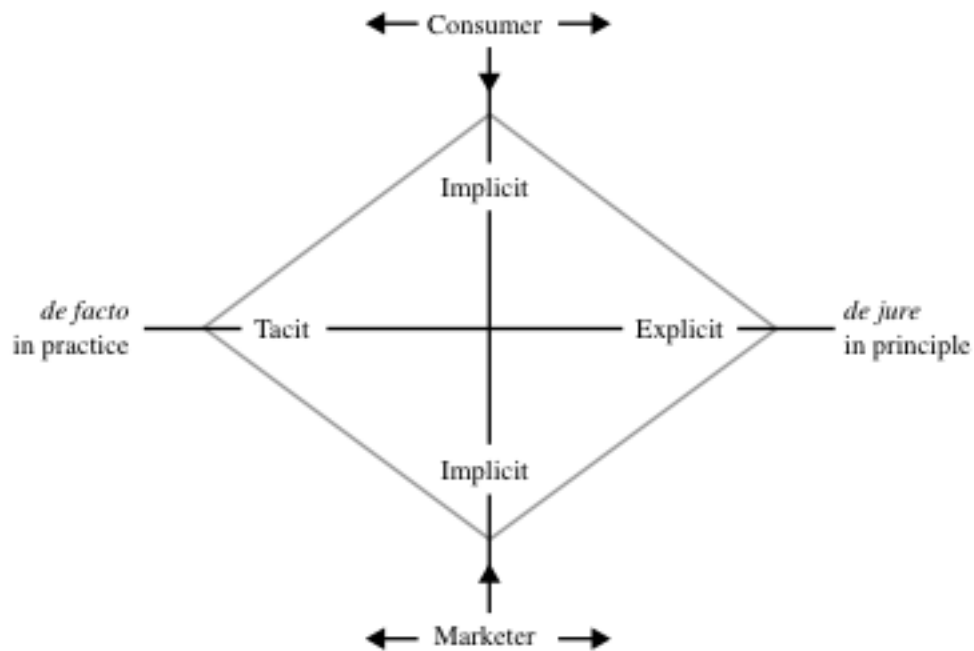
Figure 4 Spatial conceptualisation of brand knowledge (Wilson and Liu, 2011c p.31)

When further reviewing the background literature presented, conceptual models, which attempt to understand brands, oscillate around a focal point of understanding, which creates (a) *definitions,* (b) *taxonomies* and (c) *hyperboles.*

These perspectives in turn have articulated isomorphic brand findings, which in different ways have also lead to divergent and at times arguably paradoxical conclusions. Namely, that a brand is one, if not several, of the following:

- **Tool:** consumer and organisation-based
- **Entity:** a thing with distinct and independent existence
- **Meme:** an element of culture or system of behaviour passed from one individual to another
- **Allegorical organism:** significantly possessing comparable 'human' traits
- **System:** a set of connected things or parts forming a complex whole (Gestalt)
- **Story:** accounts of imaginary of real events and mythology, told for entertainment designed to evoke feelings and involvement
- **Legally defensible trademark**

From these, it becomes apparent that not only marketers and consumers have implicit and explicit traits: brands are also held to have implicit and explicit traits that offer both a core proposition and augmented features, which offer potential

that is linked to individuals. In addition, the level of knowledge and understanding of these traits may change, depending on the lens of analysis. From these, the development of a interconnected dynamic and evolutionary cultural-brand phenomenon results.

Furthermore, as brands exist as a result of conspicuous consumption, they are examined according to their:

- **Anatomy:** a physical structure
- **Physiology:** how their structure is able to carry out a function
- **Identity:** how they are recognised
- **Personality:** the characteristics and qualities which support an identity and form a distinctive character
- **Architecture:** their design and construction integrated within an organisation
- **Equity:** a calculable and perceived value
- **Power:** the capacity or ability to direct or influence the behaviour of others or the course of events
- **Influence:** the level of actualised power
- **Social capital:** the nature of the networks of relationships among people
- **Notoriety:** the positive, negative, or neutral state of being known
- **Popularity:** conversion of notoriety into becoming a positively held trait.

In the face of these perspectives, findings also shed light upon the fact that there are aspects that still remain somewhat of a *black box.* Literature exists, which attempts to evaluate the tangible and intangible assets associated with brands. However, the question remains whether enough implicit traits are identified, and make the safe passage towards being represented in attributable values - which allow for continued meaningful comparisons. For example, in defining, creating and identifying these elements, brands can be described and explained. However, how much of this is retrospective engineering or conjecture? Furthermore, do such activities improve brands and their management? In addition, do frameworks the drive categorical generalisations ensure a knowledge transfer, which allows for the creation of strong brands and management practices in the future? Literature points to globally recognised and successful brands encountering problems, due to factors outside of their control. So a key imperative of theory is to assist managers in regaining more control.

Brand exemplars and failures are discussed in literature, and how management and culture govern their existence. However 'exemplars' and 'failures' may offer little to establish sustained gains for future exploits, or other brands. Some brands break rules, or even do not follow them in the first place - and they still succeed. Other brands follow 'rules' and achieve mediocrity or failure.

Therefore a key question that remains is how do brand managers define their reality, and subsequently respond or set the agenda? In addition, what skills, qualifications and attributes are required of brand managers? Furthermore, it would appear that brands and culture can behave in an irregular manner, subject to evolutions, revolutions and mutations.

3.2.2 Economic understanding in the face of humanised brands

In harmonising the hard (Homo economicus) and soft (Homo sociologicus) economical constructs outlined in the literature review, they pull thinking between literal or esoteric evaluative starting points concerning brands. Namely:

1. The ability to generate revenue
2. Or, to be held of more as being of anthropological significance.

Synthesising these positions, the researcher asserts that brands have an *exoteric* and an *esoteric* presence in the psyche of humans, which defines their existence. Furthermore, the greater the esoteric elucidation and leanings of associated parties, the more significant a brand becomes. These navigate a brand through an evolutionary path, which elevates it from being a finite object, towards acquiring human-like characteristics. However, it remains both unclear to what degree either polar position should be considered, and how human brands in fact are. For example, if brands are comparable to humans, do humans judge their own existence and human interactions in a comparable way to those applied to brands? Wilson and Liu (2009b) consider this argument reconcile thinking with an argument that brand relations are allegorical to the story of *Pinocchio* – in that they have a human-like existence and personality of sorts, like the puppet. This is dependent in the initial stages on the puppet master, but eventually the brand craves a fully human existence.

Exploring human existence further, Wilson and Liu (2009a, 2010) suggest that brands are human in the sense that they are spiritual and god-like. This they

argue is evident in the fact that brands crave worship, outlive humans and are steeped in religious terminology, such as *iconography.* Following this argument, rather that the reliance on monotheistic Christian terminology, they introduce terms such as *reincarnation* - as they can be brought back to life and through brand extensions encourage polytheism. The use their of descriptions deliberately highlights a shift of thought, which considers that:

1. Rather than a brand denaturing, it in fact eventually dies – as it is 'human'
2. And so, brands are more than simple living organisms or molecular structures – instead they are steeped in perceived spiritual being and meaning
3. Further knowledge and understanding can be gained by accepting this intellectual and emotional human-driven phenomenon.

With brands being 'hot-housed' and nurtured into having human-like qualities and attributes, the raison d'être for this movement is to encourage brand relationships with consumers. The key question that remains is whether they are *real* enough to warrant being classed as friendships – or, perhaps due to a certain asymmetry, whether it would be more appropriate to perceive them as religious objects?

If taken to be friends, what sort of friends are they, and how do brands for example, respond when they let people down? Or, if instead they are religious objects, what defines worship? Finally, across cultures, friendships, marital affairs, families, religion, worship and other societal constructs differ. Therefore, the questions raised are whether current brand thinking is global and pluralistic enough; and does it tend towards very much of a European Christian perspective - anecdotally seen with such terms as *icons.*

In the interests of harmonising and refining existing thinking, the researcher holds friendships, religion, worship, sport, music and popular culture as being branches of the same tree of culture; and that fanatics (or *fans*) exhibit comparable traits, also argued by Wilson and Liu (2009a, 2010). For these fans, constructed identities, which are exemplified by brands is a core pursuit. Beyond this Wilson and Morgan (2011) provide case examples, which suggest that more Corporate Social Responsibility, supported by integrated marketing communications and relationship marketing, will move brands further into the area of mitigating and compensating consumers [as their friends], when they

have broken bonds of friendship, despite organisations delivering their core commodity.

3.2.3 Ability of cultural constructs to reflect current brand interactions

Following the observations of Buruma and Margalit (2004) and Said (2003), which were discussed in the literature review, Wilson (2011c) writes that established terms in existence such as: East and West; skin colour; ethnicity; pseudo-national/religious ethnicity – are often used to denote character traits. Within this there are problems and a legacy of cultural baggage, which is difficult to escape1. Postmodernist thought would argue that they are rapidly outdating. However their existence, despite perhaps migrating from their inception and heritage, unfortunately means that they still have a bearing on cultural study analysis. For if they are to be replaced, with what and how successful will the transmission of knowledge be?

Wilson (2011c) was asked to write this piece in response to observations by international public relations practitioners, of a phenomenon typified by events such as the Arab Spring; and the election of Barak Obama, president of the United States of America - as a Christian, Black, mixed-race, African, Asian, African-American, European American, with Muslim heritage. As a result of this phenomenon, academics and practitioners have questioned more traditional views, classifications and dichotomies, which suggest in some ways that at their roots there is a tendency towards grouping according to being diametrically opposed and seeking dominance over an 'other'. Examples of these constructs are: the East and West; ethnicities; national identities; and religions [especially recently framing the dominant world influencing factors according to The West and Islam - as 'clashing civilisations']. And so, with such seemingly paradoxical

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1 *"As 'The West' embarked on its path of enlightenment and discovery, the term Orientalism became applied progressively further East – necessitating the introduction of further descriptors, such as: the Near, Middle, and Far East. Furthermore, each of these terms represents the tip of an iceberg, rooted in subtexts, generalisations and for want of a better term, baggage. This is not to say that the 'Middle East' hasn't played a similar hand. Maghrib, the Arabic word for West, shares the same Arabic root word as those for: stranger, odd, sieve, exile, impetuous, violent, separate and sunset, amongst others. Comparably, it could be argued that the longest lasting legacy of colonialism and the slave trade, will be that black has become synonymous with ethnicity, despite 'black' not fulfilling the basic definitive requirements of ethnicity. Namely, a homogenous social group of people, sharing national and cultural traditions."* (Wilson, 2011c)

terms in common use and with the advent of globalisation; economic migrancy; and resulting hyphenated and collaborative identities: the researcher argues that more traditional constructs perhaps create more problems than offer solutions. From this, Wilson (2011c) suggests that in marketing concepts such as, Occidentalism, Orientalism, East and West, Black and White and even Nationalism are:

- Divisive in creating fear of an'Other'
- Out-dated, in not being able to capture the thoughts, feelings and actions, of an increasingly informed, travelled and mixed global community
- Have restrictive implications upon how brands, culture and their management are understood
- Prone to encouraging corporate colonialism, which is ecologically damaging
- Do not take into account the increasingly apolitical stances of global organisations
- Ultimately impede business and academic thinking.

This assertion is articulated further in the methodology section, where the researcher discusses the rationale behind collecting detailed biographical data from participants.

Further to this, as articulated within the award-winning conference paper by Wilson, Liu and Fan (2009), and subsequently expanded in the journal paper by Wilson and Liu (2011a), their term *surrogacy* is also presented here as a conceptual argument, which attempts to highlight a phenomenon where:

1. Brands are viewed as people
2. People are sociable and seek to form tribal networks

From this:

1. Brands (as constructed entities with identities and personalities) want people to adopt brands as 'their own'
2. People want to adopt brands as 'their own'

Which yields the categorisation matrix, where:

1. Brands look to adopt (people) [dominant]
2. Brands want to be adopted (by people) [submissive]
3. People look to adopt (brands) [proactive]
4. People want to be adopted by brands [reactive]
5. **The end game is**: People encourage brands to adopt brands.

These observations fall within the categorisation of what are forms of 'surrogacy',

and appear to be a critical aim and objective of branding. Prior to Wilson, Liu and Fan's (2009) paper, the term surrogacy had scarcely been used in connection with strategic brand management approaches. Where it was, the term had been used to describe a new product or service brand, which draws from another brand within a corporate portfolio. The difference in the definition here is that *surrogacy* is used to describe consumption. They argue that this consumption, which demonstrates surrogacy:

1. Applies to brands
2. Applies to their consumers
3. Is the consumption of culture which creates social networks and communities
4. Offers a means to generate social capital
5. Seeks the humanisation of brands, and
6. Is a ratification of authentic and credible cultural-centric brand successes

The focus of their work was examining the support of national sports teams and athletes. Their findings indicate that as a basic premise, ownership of any uniform largely suggests exclusivity and encouraged competition, which provides a good basis for examining hierarchies of exclusive preference and dynamism. However, now it appears that branded manufactures, teams, athletes and sponsors are also entering symbiotic brand relationships - where they actively seek publics, open to multiple adopted national and subsequent global identities.

Significantly, consumers are choosing to wear sporting merchandise, from an'*other*' nation, or region – whom they have no direct geographic or ethnic affiliation with. Rather, they are governed by a sharing of emotional and psychographic criteria, housed within a complex network of ascribing meaning to a coherent brand message. Here, consumers were seen to move towards embracing temporal identities, culminating in an adopted national identity. Consumers are also creating an alter-ego, through the adoption of another nation's brand. The intention being that this represents a facet of their emotional state.

Whilst there may be several reasons for them doing so, for the purposes of their paper Wilson and Liu (2011a) restrict the focus of discussion towards the desire for affiliation outside of their immediate socio-cultural settings. In doing so a long-term affiliation with an 'other' nation was held to evolve and eventually

assimilate itself into the consumer's host culture fluidly. In the interests of highlighting the level of individual complexity, according to held values, traits and decision making, Figure 5 outlines a network hierarchy from Wilson and Liu' findings, which charts how supporters may choose to arrive at a decision as to which team or athlete to support.
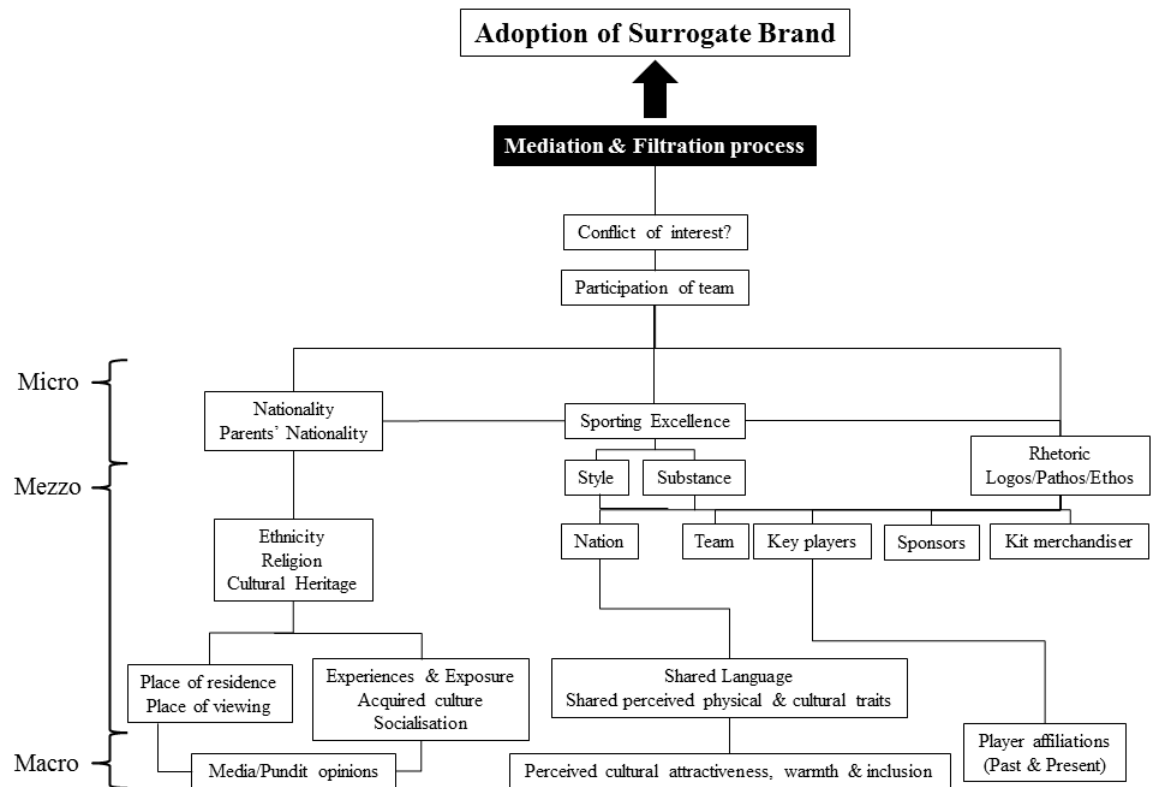
Figure 5 Dynamic decision-making tree for Brand Surrogacy (Wilson and Liu, 2011a)

These findings capture how, whilst the cultural brand approach has been termed as such, it appears to preserve little in the way of multi/cross/sub/tribal-Culturalism, religion, or ethnicity – which are observed to be significant phenomena in global branding, especially by de Mooij (2010). This framework was adapted and used as a basis for establishing two research methods:

1. What selection criteria and relevant data should be considered when selecting and analysing Delphi participants

2. What values and decisions govern how individuals interact with brands in a cultural setting.

From this basis and taking a broader cultural perspective, Wilson (2011a) outlines a framework that charts a macro-process of cultural understanding within a business-cultural context, which attempts to reconcile differences in global brand

literature. This is whilst preserving the complexity of the brand-cultural phenomenon on a micro level, as mapped out by Wilson and Liu (2011a) [Figure 6].
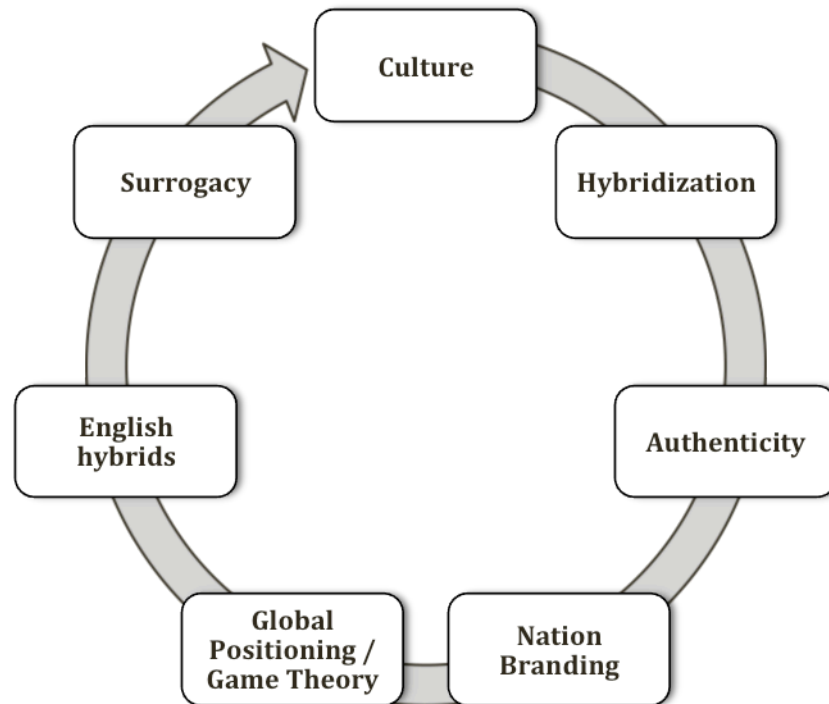
Figure 6 C.H.A.N.G.E.S. model (Wilson, 2011a)

The position adopted here in the 'CHANGES' model is that brand analysis, through contextualising factors which govern stakeholder interactions, should be mapped out according to: cyclical, dynamic and time specific communication networks. To this end, culture is transmitted through the subsequent stages of the model, with these stages representing critical rate-determining evaluative factors.

As has been discussed, English is the lingua franca of business and key to cultural transmission and understanding. But, as it is as second language to many more than hold it as a native tongue, English language itself demonstrates continual evolution – increased by 'non-natives'. Brands and marketing communications been observed to capitalise on this fact, as they are instrumental in ossifying such mutations. This is especially true for online brands such as *Google* and *Wikipedia,* which are able to demonstrate their might through making the transition into becoming universally understood *verbable* terms such as: *googling* and *doing a*

wiki. Here, the language and surrogacy stages signal the transition from implicit to explicit signalling of how culture influences global branding.

Drawing from both models and mirroring broad and narrow stakeholder analysis views: research questions, panellist biographical data and Delphi opinions, were evaluated and linked to each of these respective stages.

3.2.4 The duality of brand cultural artefacts

In widening the field of view towards a more broad-based landscape, the role of the corporate brand increases in its significance. Background theory indicated that where there are strong global branded product and service offerings, the corporate brand and that of the commodity are linked, if not understood and consumed interchangeably. From a corporate parent identity perspective: corporate identity, and supportive product/service identities, when executed through effective integrated marketing communications often pull brands into an understanding, which has to acknowledge their duality. It could be argued that this restricts the idea that brands can be fully human – as humans are unable to do the sane thing. Corporate brands rely on the sum total of a collection of employee brands, or employee branding which keeps them in existence. However, as has been considered earlier, if brands are 'gods' or 'godlike', perhaps this conceptual argument circumnavigates such philosophical paradoxes.

In Tandem, the phenomena of branding and conspicuous consumption have assisted more and more people in being able to govern what defines their realities – through information sharing, communications across cultures and social media. Brand theory, Web2.0 and consumerism challenge conventional definitions of marketing, culture, religion, management approaches, education and beyond these have spawned new terms such as *collective individualism.*

Brands are being increasingly seen as cultural artefacts. Furthermore, they appear to outlive the product or service offerings that they were initially used to label. Branding as an applied social science and as a marketing approach, attempts understand their existence and peoples' behaviour towards them, through the notion that a 'good' brand should be thought of as having attributes, qualities and values, just like a human. These postulations are discussed in tandem with

the observance of the other previously stated phenomenon, which sees more people adopting cultures, through brands - in a manner, which is akin to a form of surrogacy. Furthermore, rather than this being a zero sum game, it appears to be a cumulative process of acquisition, which creates situation-specific hybrid consumer personalities.

Following on from this, in a post-modern age, it is argued that ethnicity, religion, and cultures are being interpreted in an increasingly dichotomous, yet fluid fashion. Whilst more of these entities and occurrences are being branded, or thought of as being brands (for example celebrities); employment case law points towards individuals being accepted as having the same attributes and feelings, worthy of protection, even if they themselves do not hail from the same ethnic group. Therefore, it appears that esoteric, implicit and figurative interpretations of what were held to be explicit traits are rising in the ascendency.

With the preference of the researcher to draw from classical ancient Greek philosophical schools of thought, analogies and homophones, amongst other methods of knowledge building through logical comparison are to be essential components necessary for constructing classically rooted emergent and generative theory. As grounded theory encourages diagram building, both mentally and pictorially, the researcher has embraced these recommendations through reflecting upon evidence of providing meaning through diagrammatic explanations of phenomena in the sciences and arts. In further support of this approach, marketing and science theory frequently uses terms, acronyms, metaphors, analogies and allegories, to assist with both expanding meaning and drawing audiences into 'their way' of understanding.

Therefore, as a means of further illustrating the point of duality through analogy, Wilson (2011c) looked to the arts, considering the *Floating World*. This *Floating World,* is an allusion to the term often used to describe the urban pleasure seeking lifestyle, of the Edo period in Japan's history. Floating World is a translation of the Japanese word, *ukiyo.* This term collectively covers: tea houses, theatres, actors, celebrities, geisha, brothels, middle class, sumo wrestlers, samurai, and merchants of the time - who have been preserved in many wood-block print artefacts, known as *ukiyo-e* [pictures of the floating world]. Ironically,

ukiyo also has a homophone, which means 'Sorrowful World'. The Sorrowful World is the Buddhist place of death and rebirth, from which one seeks liberation. This concept is not unique to Japanese thinking, as comparably in Arabic the word *surah* has two homophones, which when translated mean either: a chapter of the Holy Qur'an, or a picture. In fact the root word from which Arabic is derived, means to state clearly, to declare, or to give a hansel.

Particularly here, the benefits of this analogy are fourfold, in presenting:

1. The *Floating World* as a allegory to explain the prevailing cultural phenomenon present around the modern world, especially in developed societies - which evokes imagery and reflection that can assist the researcher.
2. Thoughts on whether urban life (and allegorically branding) is 'pleasure seeking' or 'sorrowful' when reflecting on consumption. Depending on preference of either linked to the ontological argument, this impacts on the 'mood' of conclusions. Namely, is the over-arching phenomenon described in the thesis something ultimately of increasing concern to brand managers, or a welcomed opportunity?
3. Branding activities as pictorial artefacts preserving and capturing slices of life and culture – which are governing many of the products, services, activities and people allegorically described in the floating world
4. These aspects of life as cultural artefacts, in which there is an inherent value in preserving them, through painting pictures. The researcher argues that he views his research work as being similar to woodblock prints – as a slice of life, linked to time, and a boundary or frame.

Further building on the analogy of the floating world, it is apparent that self-defined constructed identities rely upon cultural commodities, as a means to locate like minds and bring people together. Most recently, brands are seen to spearhead the identification of commodities.

Sticking to the arts: as brand creation is becoming an increasingly collaborative process, the phenomenon of Hip hop music and its connected sub-culture was examined in a pilot study as part of methodological data theory. This was in order to unearth the role of creators, initiators and participants - by taking a broad-based view. Findings suggested that *authenticity* is the elusive 'X-factor' in the culture-creation process and is governed by an ability to manage innovation and hybridization factors through active competition (Wilson, 2011a). Wilson's (2011a) paper was used as a pilot study to:

- Help refine the chosen Delphi method, which will be discussed in the next chapter in more detail

- And also to establish a conceptual starting point for investigating brands and branding in a contemporary and consumer centric context – which considers how culturally-rich and local activities can cross boundaries and industries into becoming global brand phenomena.

A key challenge observed within branding, exists in understanding why brands are able to perform so effectively, permeating more traditionally perceived barriers to entry and acceptance. Anecdotally, *Apple,* as an unashamedly 'American' brand, is able to perform well in Japanese and Middle East markets – when Japan possesses strong competitor brands, and the Japanese are generally held to exhibit strong nationalistic and patriotic tendencies. Likewise, in the United States of America, consumers freely consume Japanese brands also. Brands and consumption of culture linked to consumerism appear to be able to help heal the wounds of historical conflicts. When looking again at conflicts, in the Middle East, despite vociferous expressions of disdain and calls to boycott US brands and cultural influences, due to US foreign policy, some brands are able to evade such censure.

Furthermore, whilst US brands like *Nike, Coca-Cola* and *MacDonald's* work hard to adapt their brand messages and communications to specific markets, in comparison *Apple* and *Harley Davidson* for example are especially notable, as they do little to mask their national heritage, or communications – even going so far as not to use local linguistic scripts. A further stark example lies in popular music, where consumers are seen to consume music, which they may not even be able to understand the lyrics for. Wilson, Liu and Fan (2009) also observe the support of non-local sporting teams as another example of this phenomenon. Some journalists and social commentators have cynically pointed to images of young Arab youth at political demonstrations chanting 'Death to America', whist expressing a love of Afro-American music, entertainment and fashion, and wearing *New York Yankees* baseball caps. This is especially interesting, as some of these youth mentioned have also expressed support of *Al-Qaida* insurgents. From these examples it is argued that the cultural-brand paradigm is more

complicated than merely examining functional product and brand attributes.

A further key finding of Wilson (2011a) was that the brand creator's identity in music was a central part in the branding process. This also appears to be present in 'non-music' global arms of brands such as *Apple, Facebook, Microsoft* and *Virgin.* In these brand examples, the notoriety, identity and personality of their founders is of continued importance. Literature on corporate identity, reputation management, shareholder analysis and public relations do make the link and examine such relations. However, in brand literature, beyond celebrity brand extensions, celebrity endorsement/sponsorship, and employee testimonials; less appears to be written about brand creators, managers and architects. An argument considered is if marketers are significant in branding and the brand mediates between them and consumers: should more be done to examine consumer perceptions of marketers and should they be more conspicuous to consumers in brand relations?

Finally, conclusions in the paper point towards rich tailored language and slang, termed *argot,* as preserving: bounded identity creation; discrete competitive communities; and engaged sub-cultures – which deliver collaboratively defined and unique authenticity. Therefore, a strong theme within this paper is also the argument that successful brands are those that interact with stakeholders.

3.3 Cultural brand stakeholder analysis

Having reviewed gaps in literature concerning the theoretical relationship between brands and their various stakeholders, the following section now attempts to position stakeholders according to their involvement. In the interests of attempting to take a broad-based view of involvement, or *stake,* parties will be mapped according to their level of interest, demonstrated through communication.

As mentioned in the brand-stakeholder section, in Chapter 2: with the advent of online, user-generated content and social networking, the role of the non-users and non-owners have increased in their significance. With these in mind, rather than stakes being defined by any product or service per se, the unifying factor

indicates convergence around brands. And, that stakes should be evaluated according to an analysis of communications, which map social networks.

From this, Wilson (2011c) categorised stakeholders according to ownership, and non-ownership of the brand. In doing so, the focus is shifted towards values rooted in opinion. The suggested strategic value to brand management is that participation and inter-connected *who/what/how/where/when/why* opinions are communicated – converging towards the brand. In-keeping with Mitchell, Agle and Wood (1997), a coefficient of time was also introduced, which preserved dynamism in relationships and stakes.

The following model and table presents the key concepts in this approach [Figure 7 and Table 8]
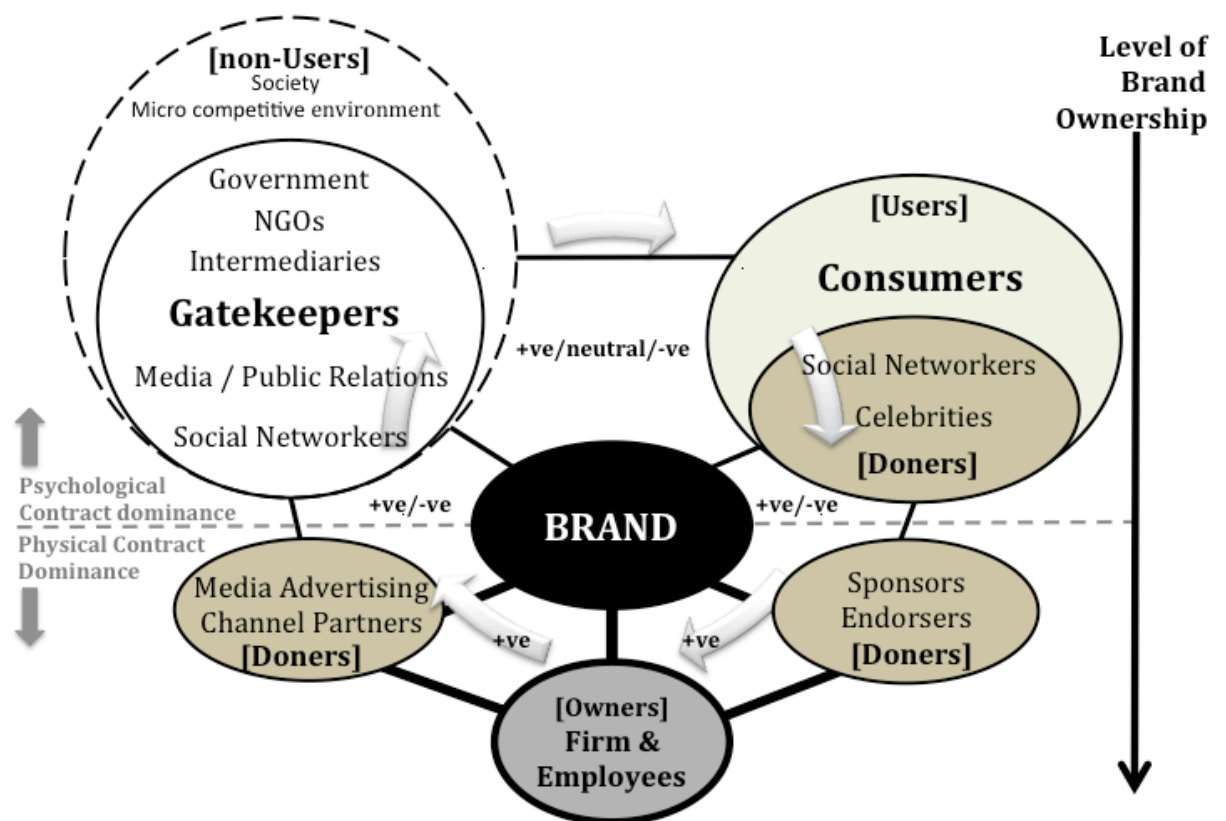
Figure 7 Brand Stakeholder model - through communication mapping (Wilson, 2011b)

Brand Stakeholders are mapped according to:
   (1) Contractual obligation
   (2) Brand Ownership/nonOwnership/temporary Ownership, *Donership*
   (3) Usage/nonUsage
   (4) Nature of Communication
   (5) Degree of Stake - qualified according to: bargaining power/interest/impact.

Each of these states is seen to have a positive, negative, or neutral effect on the brand in question.

Shading and colour of the stakeholder groupings is designed to reflect the importance and similarities between various groups.

The dotted line represents a notion of contractual obligations: which are actual, in a physical format; or implied and psychological. For example, when looking at the media, advertising channel partners are bound by formal written agreements; whilst journalists who act as public relations gatekeepers, have no obligation to support or champion a brand. From this it can also be seen that those who share a psychological contract pose a greater potential threat to brands, due to a lack of control over their communications and ability to influence brand meanings and perceptions.

Further points:

A broad view of stakeholders was taken - at a macro/mezzo level, drawing from the cultural approach to branding, along with Freeman's (1984) definition, and the attributes listed by Mitchell et al (1997). This presents stakeholder roles as *interconnected* and *dynamic* states, which are subject to time specific communication, influence and self defined legitimacy. Here, intangible and figurative aspects of branding are taken into consideration, which also suggest that:

- Roles can and will shift
- Interest groups may oscillate between homogeneity and heterogeneity
- Individuals occupy *states* which are subject to variance; and are a culmination of collective interactions

An additional form of classification was used to differentiate between the *Owner* and *nonOwner*, in order to reflect situation-specific ownership; which has been termed '*Doner*' (temporary ownership). Mitchell, Agle and Wood (1997) assert that stakeholder dynamism affects salience with managers through: variable Stakeholder attributes; socially constructed stakeholder attributes, rather than objective reality; a presence, or lack of consciousness, and wilful exercise (p.88). In response to Clarkson (1995) the suggestion is that primary and secondary status should be aligned with ownership of the brand, due to the increased

number of stakeholders, homogenous sub-groups, their significance and the levelling effect of technology. External parties to an organisation and brand therefore all are classified as being secondary. A further distinction has been made in which certain stakeholders are viewed as being key - due to their influence or importance in the brand communication process.

Wilson (2011b) suggests that

"the value of this approach, is that it gives brand managers a strategic framework through which they can plan the best way to attract further support and engagement from stakeholders, in order to preserve brand salience."

Due to the nature of this proposed framework, promotions and marketing communications are of more significance to a brand than the actual product and service offering, as indicated by Klein (2000), Holt, (2002).

Who	Main attributes	Stake	Power /Bargain	Legitimacy /Interest	Urgency /Impact	Main Direction of Communication	Stakeholder Evaluation
Owner (Internal)	**Commercial brand accountability & interest in others' consumption/stake**	**Key/Primary**	**High-Low** *(subject to role & externals)*	**High-Med** *(subject to role & externals)*	**High-Low** *(subject to role & externals)*	**To other Owners, non-Owners & Doners**	**Level of influence, Duties, Involvement, Accountability, Share of Voice**
non-Owner (External)	**an interest in consumption - without commercial gains**	**Secondary/Key**	**Low-High**	**Low-High**	**Low-High**	**To Owners & non-Owners**	**Level of influence, Duties, Involvement, Share of Voice, Opinion, Involvement, Emotional attachment/disassociation**
User Key Consumer (e.g. Celebrity, Social Networker)	Awareness & active brand opinion - driving consumption	Secondary/Key	Med-High	Med-High	Med-High Consistent	To Users and non-Users	Brand loyalty/satisfaction/importance, level of consumption, level of emotional attachment/involvement, Opinion, ability/volume/type of communication
Active non-User Gatekeeper (e.g. Media, NGO, Government, Social Networks)	Awareness & active brand opinion - but no consumption	Secondary/Key	Med-High	High/Low	High Temporal	To decision-making Owners, Doners, Users & non-Users	+ve/-ve opinion, priority, level of influence, nature of communication, share of voice, willingness to engage with owner
User Consumer	Awareness & active brand opinion - driving consumption	Secondary	Low-Med	Med	Med Consistent	To Users & non-decision making Owners	Brand loyalty/satisfaction/importance, level of consumption, level of emotional attachment/involvement, Opinion
Passive non-User (e.g. Gen. Public, Brands, Firms, Intermediaries)	Awareness & passive brand opinion - but no consumption	Secondary	Low	Low	Low Temporal	To Users & non-Users	Top of mind awareness, +ve/-ve opinion, level of influence, interest, pull to recommend
Doner (External)	**drawn towards an interest in others' consumption**	**Key/Secondary**	**Med-High**	**High-Low**	**High**	**To Owners & non-Owners**	**Opinion, Influence, Involvement, Emotional attachment**
Key Consumer (Celebrities, Social Networkers)	User-initiated brand opinion, driving consumption	Key/Secondary	High-Med	High-Med	High-Med Consistent	To Users, non-Users, Owners & Doners	Brand loyalty, level of influence, share of voice, willingness to engage with owner, ability/volume/type of communication
Media (Paid for promotion)	Owner-initiated brand opinion, driving consumption	Key/Secondary	Med-High	Med-High	High Temporal	To non-Owners & decision-making Owners	Level of influence, share of voice, priority, frequency/reach, level of involvement
Endorser (Individuals/Firms, binding contract)	Owner-initiated brand opinion, driving consumption	Key/Secondary	Med	High	High Temporal	To non-Owners, decision-making Owners	Level of influence, loyalty, share of voice, priority, frequency/reach, level of involvement, adherence to Owner's terms
Channel Partner	Collaborative, driving consumption	Key/Secondary	Low-High	High	High Persistent	To Owners & non-Owners	Level of involvement, level of influence, reach, loyalty, pull to recommend

Table 8 Brand Stakeholder classification table (Wilson, 2011b)

3.4 Focal theoretical framework

3.4.1 Brand Transience and Transcendence

Having considered the observed gaps in literature and discussed key emergent themes within the field of study, this section presents the derived conceptual framework that was used to create a research instrument, analyse data and formulate findings into a generative theory. In the interests of both consistency and appropriateness, a strong preference was taken to draw from ancient Greek philosophical schools of thought. The starting point for this journey of discovery takes its roots from the researcher's undergraduate background in chemistry and the life sciences. Present-day knowledge and understanding, derived from logic, owes a great debt to the ancient Greek philosophers. Furthermore, it is argued that as the word *thesis* is Greek in origin, meaning a 'position' referring to an 'intellectual proposition': delving deeper into the approaches of those same philosophers who demonstrated erudition through treatise which presented a thesis, is therefore also be something the researcher wanted to undertake. In further support of this approach, background theory found key branding texts made reference to ancient Greek scholarship.

Following this, works from Socrates, Plato and Aristotle were examined. Socrates was the teacher of Plato, and Plato was the teacher of Aristotle [Figure 8]. Within this doctoral thesis, Socrates' approach to interrogating literature was used. Furthermore, Socrates also cites how his journey as a philosopher began with the Oracle at Delphi. Delphi and Socrates' method of questioning are discussed in the methodology section in more detail. And so, this chapter will focus on thinking derived from Plato and Aristotle. Aristotle's *Categories* will be discussed later, and in this section Plato's arguments are summarised and applied to the field of research.
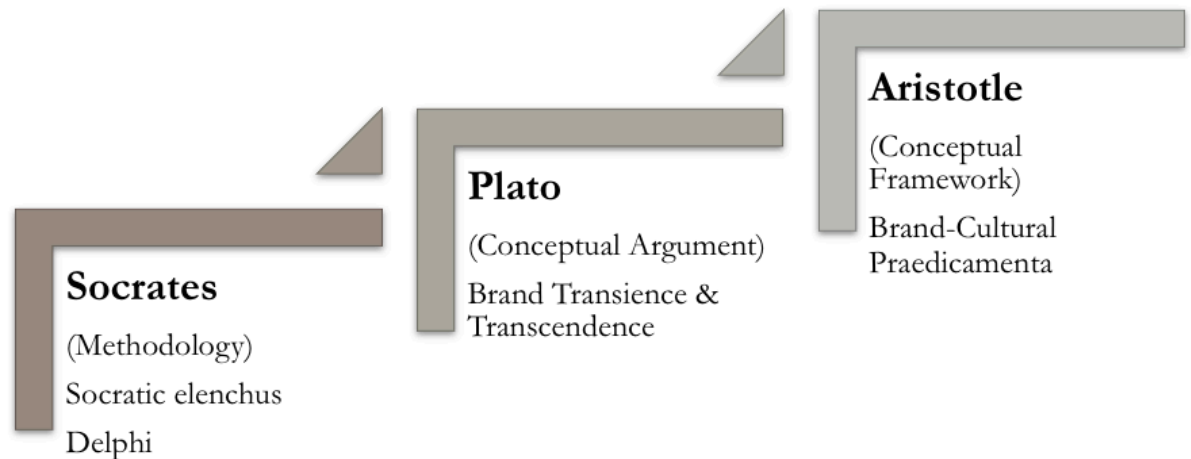
Figure 8 Formulation of the conceptual argument and focal theory, drawing from ancient Greek philosophical schools of thought

Plato's *Theory of Forms*, underpins his approach to ethics, metaphysics, aesthetics and epistemology. The theory was presented in Book X of *The Republic* (Lane, Lee and Lee, 2003) and subsequently discussed in the *Phaedo.* (Gallop, 2009). Further subsequent refinements were made in the *Parmenides* (Hamilton and Huntington, 1989), which is Plato's dialogue considering a meeting with Socrates, Parmenides and Zeno. Plato suggests that that material world is an image or copy of the real world. Therefore the real unchanging world causes what can be seen in the constantly changing apparent world. Building on this, Plato asserts that societies are structured according to *appetite, spirit* and *reason.* And following this, knowledge is a justified true belief. However, having stated this, Plato argues that *metaphysics* accepts the division of reality into the 'material' and 'spiritual'. Therefore, dialectic thought is both a type of reasoning and a method of intuition. The literature points to human existence, that of brands and their management as being understood according to a metaphysical standpoint. Namely, that there are two fundamental questions: *what is there,* and *what is it like.* These questions appraise the interplay of existence, objects, space, time and their respective properties – as means of understanding reality [Figure 9].

From this and building on the literature review, the researcher presents the following stepwise conceptual argument:

1. Brands exhibit two overarching states of existence, namely:
   a. **Transience**: lasting for a short time, and
   b. **Transcendence**: existence and experience beyond a normal or physical level.
2. They are therefore understood through the consideration of each and the subsequent reconciliation of both positions.
3. These states of existence place them subject to their cultural environment on a general level and specifically managers.
4. What remains unclear however, is to what degree brands are *material* or *spiritual* - and therefore as an extension, whether they are governed more by *intuition* or *reasoning.*

This conceptual argument highlights the complexity of a phenomenon. By definition, what constitutes a phenomenon renders it as an observed body of facts and situation, which is the object of our attention and senses. Furthermore, a common clause of phenomena is that they bring existing explanations into question. From these, a laddered question is posed:

- Where (if at all) does a rubicon exist between what constitutes culture and what constitutes a brand – and therefore how, where and to what degree does each influence each other?
- And furthermore, if established, what skills do brand managers require; how should they behave; and where should their focus lie?
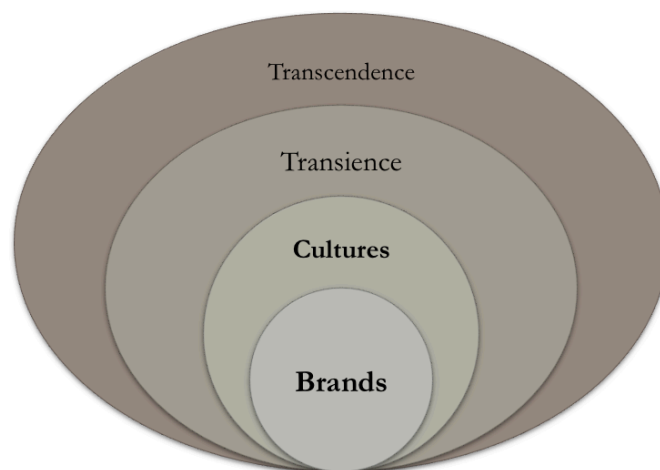
Figure 9 Stacked Venn depicting the metaphysical nature of brands (Wilson and Liu, 2011a)

Having presented the following conceptual argument and connected philosophical questions, the next section will map out the conceptual framework used to investigate them further.

3.4.2 The Brand-Cultural Praedicamenta

The following section extends and drills down the Plato-influenced conceptual argument stated. Here, the researcher draws from the work of Aristotle, which also falls under the philosophical school of thought know as *Neo-Platonism* - that considers the *world-soul* and *phenomenal world*. One of the key focuses of Evangeliou's (1998) work, is how the philosopher Porphyry 323/233AD accepted and defended Aristotle's *Categories in toto* [which are discussed below]. Furthermore, using inclusive interpretations, Porphyry reconciled and harmonised perceived irreconcilable differences concerning Platonism and Aristotelianism - which were otherwise held to be untenable by several philosophers of the time [in his work *"On the Unity of Plato's and Aristotle's Philosophy"*] (Evangeliou, 1988). Porphyry argued that philosophers' opposition exposed political motives and a lack of detailed critical judgement. Porphyry's approach is key in this doctoral thesis, as the researcher has chosen to draw from both Platonism and Aristotelianism. Before outlining the researcher's Brand-Cultural conceptual framework, the source of inspiration of which is Aristotle's *Praedicamenta* will be discussed in more detail.

3.4.2.1 Aristotle's classical Praedicamenta

Aristotle's *Categories* is a text from Aristotle's *Organon*, which places all objects of human apprehension under one of ten categories - known as the *praedicamenta*.

> *"Aristotle's doctrine of categories is important for the history of Hellenic and Western philosophy. He used it skilfully for reformulating and resolving many traditional problems of logical, ontological, epistemological and ethical import" (Evangeliou, 1988, p.xi).*

The *Categories* asserts that all possible kinds of 'thing' can be the:

- **Subject**: A person, thing or circumstance that is being discussed, described, or dealt with – giving rise to a specified feeling, response, or action. It is the central substance or core of a thing as opposed to its attributes – about which the rest of a clause is predicated.

- **Predicate** of a **Proposition**: *Predicates* are the part of a sentence or clause containing a verb and stating something about the subject. Within the rules of logic, this ascribes that something is affirmed or denied concerning an argument of a proposition. *Propositions* are a statement or assertion that both expresses and demonstrates a judgment or opinion, that logically expresses a concept that can be true or false.

Studtmann (2008) [Table 9], categorises the four forms of predication upon which the definitions of categories depend:

1. Substance
2. Quantity
3. Quality
4. Relatives

Studman's (2008) categories of predication, derived from Aristole were used as a tool to explain phenomena. The notion of predication offers the best way to tell a story within an interrogative framework - especially where there exists a diverse body of literature, which is the case in this instance. To this end, literature can be harmonised and grounded, when working towards one identified phenomenon. Milliken (2001) argues that in marketing management literature insufficient detail is paid to qualitative research, which stifles innovation and creativity in thinking. In Milliken's paper, Aristotle is cited as being a key historical source from which the study of phenomena has been developed. Vignali and Zundel (2003) cite Aristotle's frameworks as providing a way of forumualting scientific knowledge to practical ends for management theory, using qualitative phenomenological approaches. Hackley and Tiwsaki (2006) also cite Aristotle as being central to theory and phenomenological approaches, within their paper which explores concepts for understanding the experience of consumer engagement. From these observations, the researcher decided that firstly, there exists an established precedent for using Aristotle's work from first principles still

to this day; and secondly, that this is being undertaken in the field of marketing management, where phenomenological qualitative methods are favoured.

Furthermore, the idea of Aristotle offering relevance to brand theory appears to be positively asserted. Braun's (2004) book, *The Philosophy of Branding – Great Philosophers Think Brands,* gives separate chapters to Socrates, Plato, and Aristotle. Jain (2008) blogs about how Braun's (2004) work on Aristotle can be applied to named case examples. Waite (2010) published an inductive and reflective blog entitled 'Aristotle's Take on Branding'. Azzarello (2010) uses an Aristotelian approach to humanised branding. Yalos Branding Intelligence (2010) pose the question whether Aristotle was a branding guru. Within academic journal sources, Woodside (2010) discusses how the work of Holt (2004) on iconic brands and encapsulated myths links closely with the archetypes of Aristotle. Woodside also cites Hiltunen's (2002) book, which considers commercial storytelling to have an Aristotelian anatomy.

Based upon literature searches, what remained absent however are two activities, which the researcher attempted to bridge. Firstly, a refined and adapted Aristotelian framework for branding as a focal theory; and secondly, one which was tested empirically.

1. Substance	2. Quantity

• Immobile Substances: Unmoved Mover(s)
 • Mobile Substances: Body
    ○ Eternal Mobile Substances: Heavens
    ○ Destructible Mobile Substances: Sublunary bodies
      ■ Unensouled Destructible Mobile Substances: Elements
      ■ Ensouled Destructible Mobile Substances: Living things
        • Incapable of Perception: Plants
        • Capable of Perception: Animals
           ○ Irrational: Non-Human Animals
           ○ Rational: Humans
	• Continuous Quantities
	    ○ Line
	    ○ Surface
	    ○ Body
	    ○ Time
	    ○ Place
	 • Discrete Quantities
	    ○ Number
	    ○ Speech

3. Quality	4. Relatives: the positioning of phenomena
• Habits and Dispositions • Natural Capabilities and Incapabilities • Affective Qualities and Affections • Shape	

Table 9 Categorisation of four forms of predication (Studtmann, 2008)

These four forms of predication are also part of Aristotle's categories and will now be discussed further. Ackrill (1963) summarises Aristotle's resulting ten categories as follows:

1. **Substances:** which are those primary and particular things, which cannot be predicated, in comparison to secondary substances, which are universals that can be predicated. Hence, Aristotle for example, is a primary substance, whilst man is a secondary substance. Therefore, all that is predicated of man is predicated of Aristotle.

2. **Quantities:** which are discrete or continuous extensions of objects.

3. **Qualification** or **Quality:** where their determination characterises the nature of the object, often using adjectives.

4. **Relativity or Relations:** considers the way in which objects are related to each other, the dependencies of various physical phenomena and their relative motion in connection with the observer – especially regarding their nature and behaviour.

5. **Where:** maps the position of things in relation to the surrounding environment.

6. **When:** positions objects in relation to the course of events, according to time.

7. **Being-in-a-position:** which is a human construct, taken to mean the relative position of the parts of a living object, attributed with a present participle and adverb. Therefore can be viewed as the end point for the corresponding action - given that the position of the parts is inseparable from the state of rest implied.

8. **Having** [a state or condition]: indicating that a condition of rest results from an affection – namely, being acted on and therefore denoting a past tense. These are physical attributes of objects, which apply both to the living and the inanimate.

9. **Doing** or **Action:** which produces change in another object.

10. **Being-affected** or **Affection:** here, *acting* is also to be *acted on.* Within this category, Aristotle considers this to be a general construct which accommodates passion, passivity and the reception if change from another object.

3.4.2.2 The Brand-Cultural Praedicamenta framework

Having stated Aristotle's categories, it is argued by the researcher that brands can be understood using this approach and mapped to Aristotle's framework, whilst harmonising existing schools of brand thought, as follows [Figure 10]:

Brand: Anatomy, Physiology & Essence

- Substances
- Quantities
- Qualification & Qualities

Market Proposition & Stakeholder Positioning

- Relativity & Relations
- Where?
- When?

Brand-Cultural Paradigm

- Being in a Position
- Having
- Doing & Action
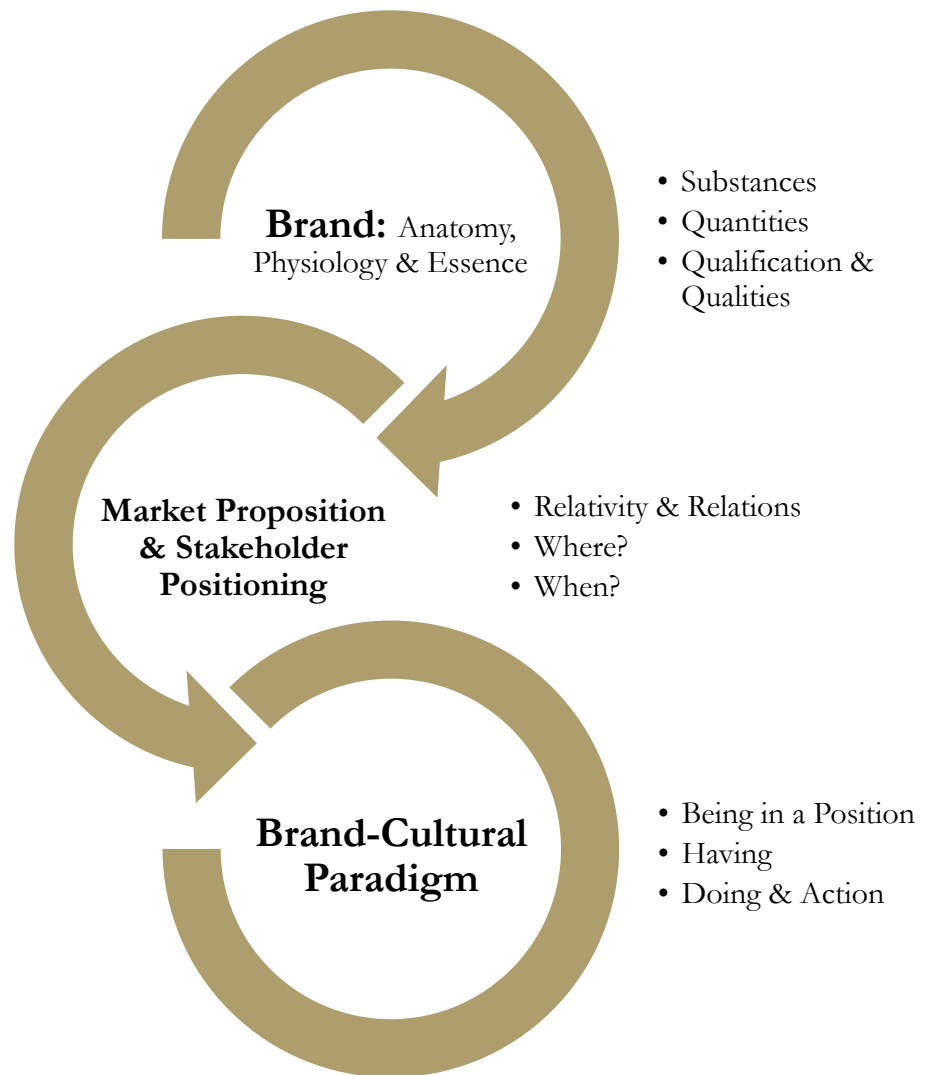
Figure 10 Main focal theory: The Brand-Cultural Praedicamenta

This is the core guiding focal theory presented in the thesis. Drawing for the literature review, it is argued that brands can be understood according to three broad categories.

Mapping of Aristotle's categories to the Brand-Cultural Praedicamenta
- **Categories 1-3:** Brand Anatomy, Physiology and Essence
- **Categories 4-6:** Market proposition/Stakeholder positioning
- **Categories: 7-10:** Top-down/Bottom-up Brand-Cultural Paradigm

As has been discussed in the previous chapter, the linchpin towards understanding the brand- culture phenomenon is stakeholder analysis. This is also held to be the area where there are current literature gaps. It is argued that brand stakeholder analysis, which encapsulates the dynamism, diffusion, and influence demonstrated by interactive and interconnected social networks appears to be in its infancy. To this end, the stakeholder model is the key supporting theory to the main praedicamenta model.

3.5 Research Questions

As stated, present-day knowledge and understanding, derived from logic, owes a great debt to the ancient Greek philosophers. Furthermore, the word *thesis* is Greek in origin, meaning a 'position' referring to an 'intellectual proposition'. With this in mind, works from Socrates, Plato and Aristotle were examined and mapped to the research problem.

Here the presented praedicamenta conceptual framework embodies the landscape observed within the literature review, along with the identified gaps. This was used to form the basis for analysing the identified phenomenon, through research. The following research questions are stated, which shaped the methods and nature of the doctoral study.

Research questions
1. How should brands be defined and understood?
2. How do brands and culture influence each other?
3. What exemplars help brand managers to predict the health and performance of a brand?
4. How universal are these branding exemplars?
5. What skills competences are required of brand managers?
6. Do academics and practitioners understand brands in the same way?

The following model maps out how these research questions relate to each other, are grouped and map to the focal theory [Figure 11]:
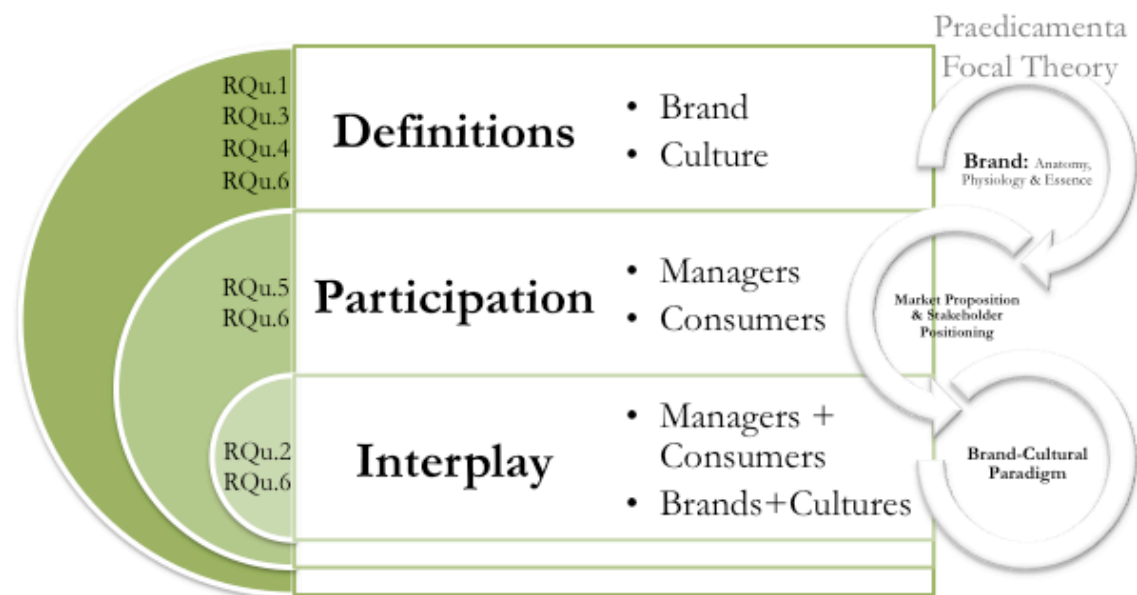
Figure 11 Research questions: grouped and mapped according to the focal theory

The research questions as stated are important because they provide a grounded theory approach to generating data, which can be coded and then selectively coded into one phenomenon. This process of coding and analysis not only requires examinations of the phenomenon, but also related causes, context, consequences and strategies – which are used by the researcher to understand the phenomenon in greater detail. Through these, attempts are made to also address all of the identified gaps. However, at this stage it is unclear how big each of the gaps are, or how significant they are. Nevertheless, the main focus of the study is the cultural landscape in which brands exist and how they are managed, through collective bonds and obligations. Having mapped these research questions to three groups, reflective of three lenses of understanding, Delphi questions were then generated. Nine Delphi questions were created, with three questions grouped under three themes [Figure 12]:

1. **Theme One:** Defining Brands, evaluating and calculating their performance
2. **Theme Two:** Brand management – definition, skills, competences and the role of the consumer
3. **Theme Three:** Making sense of culture and the interplay with branding
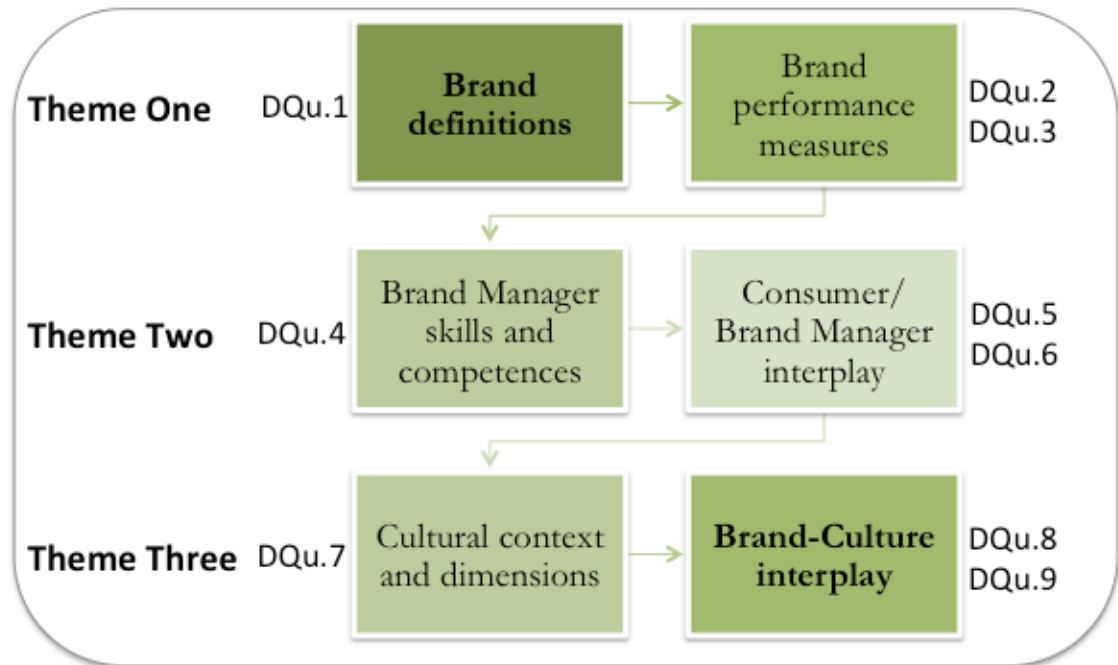
Figure 12 Delphi questions: grouped and mapped according to research themes

The decision was taken to question participants on branding; followed by management; then stakeholder relations; and finally cultural interactions, for the following reasons:

- Brands and how they are managed are the focus of the study - rather than culture and how it is managed in tandem or isolation to brands
- In order to first of all review thinking, in keeping with previous brand management schools of thought
- In order to test the relative strength of the observed brand-cultural phenomenon, compared with other previous schools of thought

The Delphi questions offered several brand definitions, from different perspectives and types of sources, with the aim of stimulating panellist discussions. From an academic position, the American Marketing Association (1960) definition is the most reliable and generally accepted. However, in this part of the research, what is more important is to investigate how the panellists critically review definitions. For example, is the concept or the source more important. When considering the inclusion on Koshy's (2010) definition: Koshy's keynote speech from where the definition was taken, was the basis for a conference discussion, in which three of the Delphi participants were panel discussants. The researcher attended the international conference, in India and observed that there were many discussions, which tackled issues central to the research study. Therefore, it was felt that finding a way to continue these discussions would be of great value. Furthermore, Koshy is a co-author with Kotler and Keller, on a text that focuses on marketing from a South Asian Perspective (Kotler, Keller, Koshy and Jha, 2007). And following discussions with Koshy and participant observations, it was deduced that his addition may inductively encourage additional facets of ethnocentric cognition in panellists. Finally, with the subsequent publication of work by Tungate (2010) and Kapferer and Bastien (2010), after the Delphi questions had been constructed, it was apparent that they too assert the importance of affordable luxuries of mass prestige – which offered positive affirmation of the researcher's decision-making to investigate emerging trends.

All of the Delphi questions were constructed entirely by the researcher, based upon the identified gaps and in order to test the focal theory.

Below are the actual Delphi questions:

<u>Delphi Questions</u>

The American Marketing Association (1960) defines a brand as: "A name, term, sign, symbol, or design, or combination of them which is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors."

Brand Channel (2009) defines brands as being, "a mixture of attributes, tangible and intangible, symbolised in a trademark, which, if managed properly, creates value and influence."

Professor Abraham Koshy (2010) talks of a brand being (1) the offspring of an organization's leadership, (2) constituting a promise given to consumers, (3) an 'affordable luxury', and (4) offering 'mass prestige'.

1. *What would you add and/or amend about these definitions? Also, do the same rules govern all brands, in all segments?*
2. *In light of academic discussions, which consider aspects of a brand's DNA, identity, personality, image and influence; how do you differentiate between successful, mediocre and poor brands? And following this point, what would you suggest brands need in order to improve?*
3. *It is debated whether it is possible to reflect upon enough of the intangible components of a brand within brand evaluations. How do you measure the value of a brand and what other steps could be taken to improve these calculations?*

4. *What education, experience, skills and competences should brand managers have and what from your experience tends to be the norm?*
5. *Consider who is involved in the management of a brand and the parties, inside and outside of an organisation, that are able to exercise control. Also, as brands are seen to possess their own human-like attributes; what are your views on whether brands are defined by their consumer segments and wider stakeholders - or alternatively is it brands and managers that are shaping the agenda?*
6. *Is there any difference between how brand managers and brand consumers perceive their ability and legitimacy to influence the behaviour of a brand?*

Herskovits (1948) is of the view that culture "is the man-made part of the environment". Smith and Bond (1998) explain that this includes both material objects and social institutions. However, they suggest that it does not help us decide what conceptual units allow us to make cross-cultural comparisons.

7. *What would you add and/or amend about this definition. Also what would you use to compare and contrast cultures and how do you do this?*
8. *It is considered that there exists a relationship between Brands and Culture. How would define this relationship; and do brands govern culture, or do cultures govern brands? What encourages an awareness of brands and culture, and an appetite for both of these?*
9. *What do you understand by terms such as Brand Surrogacy, Cultural-hybridisation and Ethnocentricity, which observe shifting patterns in thought, emotions and behaviour? How do these phenomena affect brands?*

It is conceded that there are several ways in which the research questions could have been mapped and laddered, which may have yielded different data opinions. However, in response, as the Delphi study is an iterative process, it is argued that in subsequent rounds the order of the questions becomes less of an issue for panellists and is more of a concern for the researcher. Therefore, on completion of data collection, data was firstly analysed according to the Delphi questions and then was subsequently fed back to the research questions and focal praedicamenta theory - as these research questions were reflective of the researcher's approach to grounding the theory according to the identified phenomenon.

3.6 Conclusions

3.6.1 Gaps in the literature

How brand knowledge and understanding is unearthed appears to present gaps and harmonisation in thinking. This is due to differences in focus and interpretation of: brand properties and dualities, the transition toward brand humanisation, economic theory, associated cultural factors, stakeholder analysis, and control elements. The identified gaps in the literature point towards insufficient progression in brand definitions, which capture the full applications and potential of brands in the face of societal developments within the same timeframe. Furthermore, with the observed humanisation of brands it remains

unclear as to how human brands in fact are. As an extension, with brands becoming 'humanoids', they are now positioned as actors within a stakeholder network - which is a departure from current academic approaches to stakeholder analysis, whilst it is observed that in fact such an approach is understood and practiced by brand professionals. Findings were supported by a published pilot study by the researcher.

3.6.2 Underpinning conceptual rationale

As a means of reconciling these gaps, a conceptual framework was developed to investigate the research problem further. The creation of a conceptual focal theory framework, was designed to establish a conceptual standpoint and narrative, which firstly focused on the gel which brought together the identified gaps and subsequently provided a basis for constructing research questions. The resulting focal theory stated that Brands exhibit two overarching states of existence, namely:

- o **Transience**: lasting for a short time, and
- o **Transcendence**: existence and experience beyond a normal or physical level.

These are underpinned by the following guiding principles:

- Brands are therefore understood through the consideration of each and the subsequent reconciliation of both states of existence
- These states of existence place them subject to their cultural environment on a general level and specifically managers
- Brands are cultural artefacts which transmit meaning, nourish and reflect human existance
- Brands rely on economic theories of reciprocity and emotional intangible transactional exchanges
- What remains unclear however, is to what degree brands are *material* or *spiritual* - and as an extension, whether they are governed more by *intuition* or *reasoning*
- A broad and dynamic view of brand stakeholder analysis is a method of understanding brands, from the outside-in – drawing from top-down, bottom-up cultural brand approaches
- This also necessitates the consideration of non-brand owners and non-brand users, in addition to more conventional marketer-consumer constructs – as they all have the power, legitimacy and urgency to influence brands, culture and brand management

The resulting Brand-Cultural Praedicamenta conceptual framework mapped Aristotle's *categories* to emergent brand themes. Furthermore, the brand stakeholder model supported this, in order to add further depth and clarity to an area observed to be under examined in background literature and significant in its potential to unearth key phenomenological data. The following chapter will now consider and articulate the chosen methodological approach used to investigate the stated phenomenon and chosen field of research.

Chapter Four: Data Theory

Appraising and constructing a research method – designed to investigate focal theory and research questions, using empirical data

Chapter 4: Data Theory -

Methodology

4.1 Introduction

As a result of identified preliminary phenomenological investigations, based upon practitioner experience in the field and literature searches, it was observed and that there exists a research imperative to unearth further erudition surrounding the cultural perspective to branding. Subsequently, having presented background theory findings and the identification of gaps in literature, a focal theoretical framework was constructed with linked research questions - designed to investigate the problem further.

In focussing on how research should be undertaken, Carson, Gilmore, Perry and Gronhaug (2001) consider how a research position impacts upon *what*, *how* and *why* research is carried out and state that it is the philosophy of research which *"helps to contribute a deeper and wider perspective of research so that our own specific research projects can have a clearer purpose within the wider context"* (p.1). Comparably, Miles and Huberman (1994) contend that researchers will have diverse views on how they construe the shape of the social world. Therefore, knowing where a researcher is coming from will assist in understanding what can be known and *"how these social facts can be faithfully rendered"* (Miles and Huberman, 1994 p.4). Collectively, these points suggest that not only the need for research - but also its purpose; approach; the link between the researcher and their immediate setting; the wider societal environment; and the implications require consideration. Furthermore, in the interests of academic rigour and completeness, limitations also necessitate an appraisal.

When looking at phenomenological paradigms, the suggestion is that the world is socially constructed and as a result subjective. Therefore, research is driven by human interests, and more specifically the researcher has to be considered as

part of the phenomenon in question. And so, research approaches should be driven by the pursuit of understanding meanings immersed in the real world, appraising what is happening in real time. This necessitates that phenomena are viewed in their totality, from different perspectives, over sufficient time – as reductionism may not be entirely possible. Furthermore, in attempting to reduce elements into more simplistic forms, there is a risk that isomorphism (surface observations and groupings according to similarities), may mask both the complexity and diverse origins of factors, which contribute to phenomena.

With these in mind, the following chapter clearly outlines the:

- Philosophical perspective adopted
- Methodological underpinnings
- Rationale and justifications for such an approach
- Expertise of the researcher
- Appraisal of the method's suitability for doctoral studies
- Research tools and techniques used
- Methods of data collection and analysis
- Limitations and alternative approaches

4.2 Research philosophy

4.2.1 Ontological argument

The following section lays out the philosophical assumptions made, for the purpose of investigating how brands, culture and management can be viewed, in connection with their presence in society.

Applied concepts are related and therefore subject to context and perceptions - which colour the lens of analysis. Therefore the dogmatic pursuit of science as yielding a linear and absolute equation raises issues - in an increasingly interrelated and dynamic world. Derived static causal equations are time specific and quickly out-dated, due to cross-fertilisation and mutations; perceived realities and responsive innovations and adaptations. Otherwise, they run the risk of a lack of depth and therefore valuable application and contributions. Furthermore, the 'petri-dish' systems approach required to regulate a 'laboratory'

environment, has the potential to render experiments detached from the pace and rhythm of reality – which raise control issues.

It is argued that the emotional facets of human nature and brands are difficult to transcribe and largely done retrospectively. In addition, there is evidence to show that even when human and brand attributes are mapped and engineered, these do not guarantee success. Therefore, attempts to completely transcribe causal relationships may yield optimisation, but they do not guarantee success, due to the number of dynamic interrelated variables. Whilst causality can be assessed through syllogisms, it is argued rather that concepts should be tested, and the means by which reality is understood, experienced, consumed and contributed towards, holds the greater knowledge. Therefore, *what it is* and *why* hold less significance than *what happens* and *what might happen.* For example: *what is love* and *why,* do little to explain reality in comparison to *what happens when people love* and *how might love change the future.*

In support of this, Wilson and Morgan (2011) highlight limitations of purely positivistic approaches and the role of subjectivity, even in mathematics - when looking to investigate facets of human nature and brand relationships:

> *"Maths is supposed to be the same everywhere – a universal language that deals in absolute truths. Yet, while the truths of mathematics are indeed absolute, our approach to numbers and counting is influenced by culture to a surprising degree."* (Wilson and Morgan, p.670)

Therefore, the researcher has chosen to adopt an antipositivist/non-positivist interpretive sociological approach to defining the subject field. Interpretive social science traces its roots back to Max Weber (1864-1920) and Wilhem Dilthey (1833-1911); and is related to *hermeneutics.* Hermeneutics originates in meaning from the Greek mythological god Hermes. It was Hermes who communicated the desires of the gods, and so in this context it *"literally means making the obscure plain"* (Blaikie, 1993:28). Hermeneutics is widely used in philosophy, art history, religious studies, linguistics and literary criticism. *"It emphasizes a detailed reading of text, which could refer to a conversation, written words, or pictures. A researcher conducts 'a reading' to discover the meaning embedded in the text...In other words true meaning is rarely obvious on the surface..."* (Neuman, 2006 p.88). As brands, culture and management each embrace and are subject to the

humanities listed above, it is argued that interpretive sociology appears to present a natural and appropriate ontological position.

In Wilhem Dithey's (1883) major work, in German, *Einleitung in die Geisteswissenshaften (Introduction to the Human Sciences)* he argues that there are two fundamentally different types of science: (1) abstract explanation and (2) empathetic understanding - *Verstehen*. It is the latter which Dithey favours and Neuman (2006) summarises as *"the everyday lived experience of people in specific historical settings"* (p.87). Neuman (2006) goes onto observe how Max Weber embrace *Verstehen* and how Weber's view was that personal reasons and motives shape our internal feelings and guide decision-making. Therefore, learning has to be focussed towards understanding these reasons and feelings:

> *"We shall speak of 'social action' wherever human action is subjectively related in meaning to the behaviour of others. An unintended collision of two cyclists, for example, shall not be called social action. But we will define as such their possible prior attempts to dodge one another... Social action is not the only kind of action significant for sociological causal explanation, but it is the primary object of an 'interpretive sociology'"* (Weber, 1981, p.159).

4.2.2 Epistemological argument

Carson, Gilmore, Perry and Gronhaug (2001) suggest, "interpretive qualitative research methods are valuable for in-depth understanding of phenomena in the marketing domain, in managerial and consumer contexts" (p.64). Van Maanen (1979) states that qualitative methods seek to "describe, decode, translate and otherwise come to terms with the meaning, not the frequency, of certain more of less naturally occurring phenomena in the social world" (p.520).

Following the ontological argument articulated, the points below outline how further knowledge can be unearthed - by:

- Adopting a stance which synthesizes Anti-positivism, Interpretive, Humanistic Sociological and Postmodern methods
- Identifying Phenomena and responding using inductive reasoning
- Providing the right forum and environment for the pursuit of knowledge.
- Using an iterative process, which allows participants to reflect and respond to comments on their own and other expert's views
- Analysing data, drawing from hermeneutical Conceptual Metaphor Theory and Critical Discourse Analysis (Wilson and Liu, 2010, 2011).

4.2.3 Research design

Following the stated philosophical position, a method was chosen designed to elicit detailed qualitative data with the potential for grouping, quantification and generalizations. In the interests of achieving data saturation, and ensuring data quality and rigor, iterative processes were considered important. Furthermore, background theory signals the need to undertake phenomenological analysis - based upon theory and definition building, which captures emergent themes. Therefore an approach was advocated which offered structure to open-ended exploratory questioning. The next section will present the chosen research method in more detail.

4.3 Research method

A detailed empirical research methodological overview is presented in Figure 13; having already addressed the points concerning background theory, identification of a research need and a focal theory starting point. The following sections will now outline the choice of research methods, with critical and reflective justifications, indicating the sequence and structure of research activity. In the interest of continuity and appropriateness, more detailed information concerning the treatment of collected empirical data and adopted approach will be presented within Chapters 5 and 6 alongside findings and discussions. This is also held to be an essential component of reflexive and grounded qualitative research, in line with more applied science narrative research.
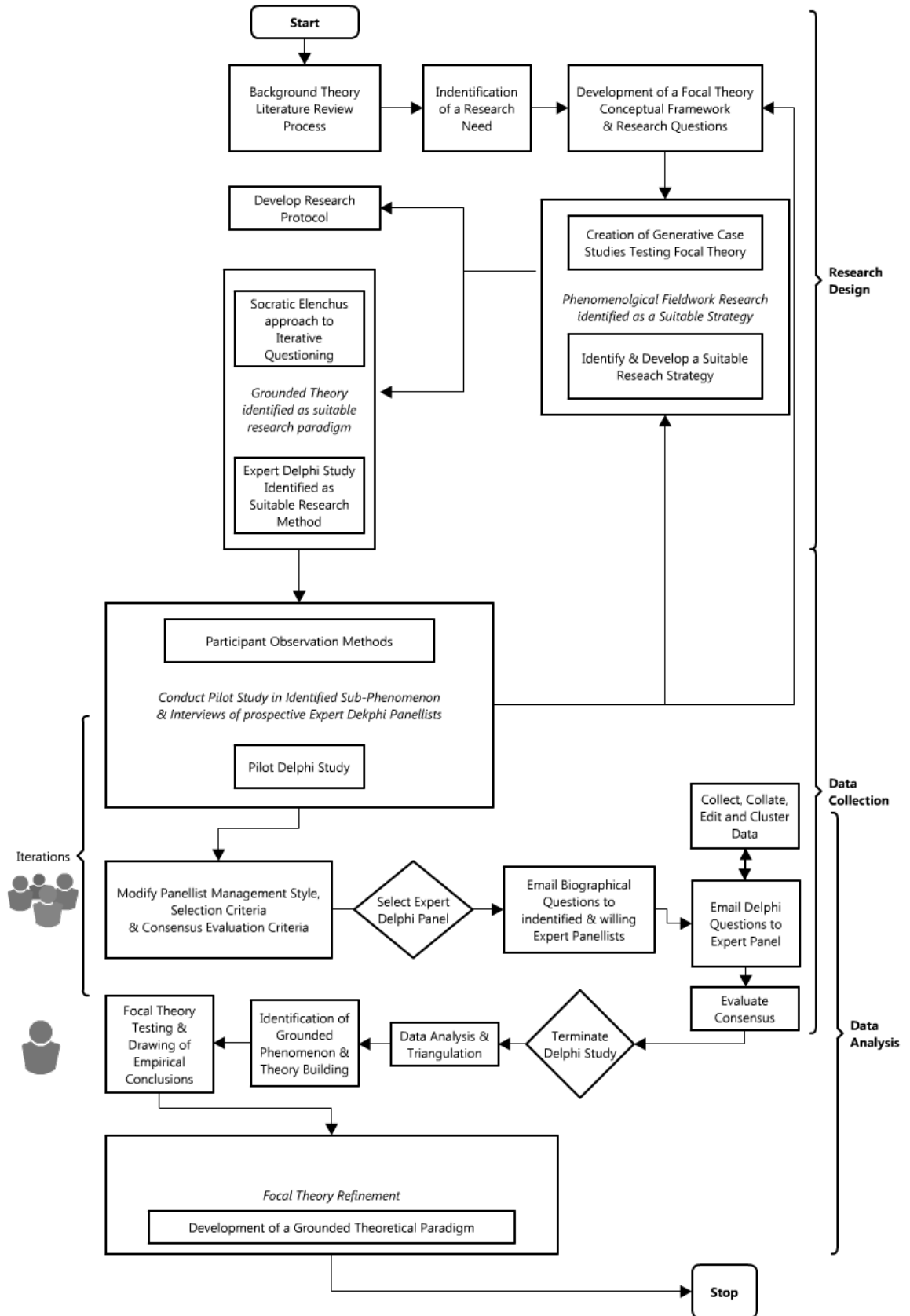
Figure 13 Empirical research methodology

The research approach selected by the researcher was the Expert Delphi Technique. This was interpreted top-down and bottom-up using Grounded Theory methods. Grounded Theory and the Delphi Study were both executed and linked, using the process of the Socratic method of elenchus [Figure 14].
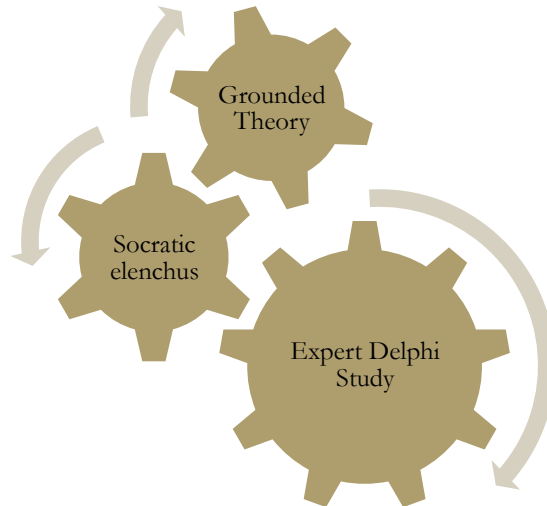
Figure 1415 Research Approach

Whilst each could have been selected as a stand-alone method, having selected all three, each becomes interdependent on one another. The reasons for the researcher choosing this approach and harmonising the three will be discussed in more detail in subsequent sections. Furthermore, in blending three similar, yet stand-alone philosophical methods, the researcher has sought to achieve the most 'appropriate' research instrument to investigate the research problem. It is conceded that other researchers may choose to change the balance and significance of one technique over another than is presented here – however, such arguments are inevitable in any research endeavour.

Broadly speaking on a macro level, the research methods chosen can be understood as being part of a dynamic matrix [Figure 15]. At different stages of the research process, the focus and significance of each method will oscillate – depending on the task and lens of analysis. More specifically on a micro level, the following data analysis techniques are grouped and linked to supportive methods, expanded upon in Appendix 2.
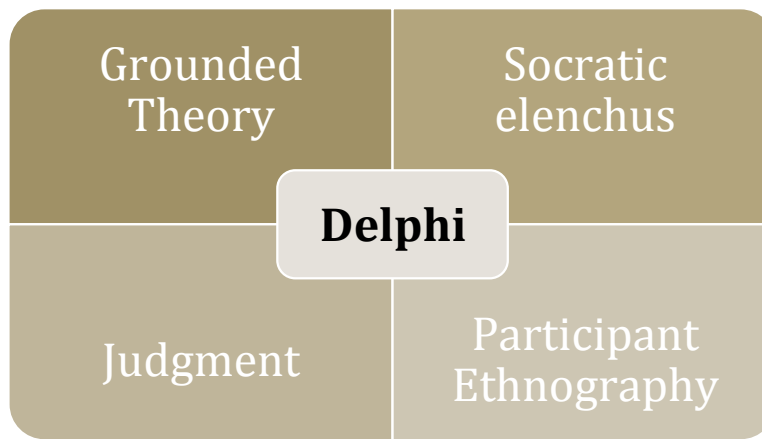
Figure 15 Methodological matrix

After presenting a detailed overview of this research approach, this chapter will further drill down the method and various techniques used to collect data.

4.3.1 Grounded Theory paradigm

Grounded Theory is an inductive method, widely used in qualitative research, where the nature of findings is an emergent theory, derived from systematic and iterative processes of joint data collection and analysis. "The purpose of grounded theory is to build a theory that is faithful to the evidence. It is a method for discovering a new theory that is faithful to the evidence. In it, the researcher compares unlike phenomena with a view towards learning similarities" (Neuman, 2006 p.60). Since its inception by Glaser and Strauss (1967), Grounded Theory follows two main strands (Goulding, 2002; Glaser, 1992; and Strauss and Corbin, 1990, 1998).

Glaser (1992). Glaser (1992) argues that grounded theorists should not be exposed to and contaminated by extant literature. Furthermore, Glaser (1992) suggests that grounded research should begin with a specific social phenomenon, rather than research questions, or social concepts.

In contrast, Strauss and Corbin (1990, 1998) accommodate the application of literature or extant theories, as part of the process of grounded theory research. And so, abstract concepts can form the basis for disciplined investigation of extant literature, considering previous conceptual understanding.

Goulding (2002) observes that existing theory may limit the scope of the research problem, in that it has a tendency to pull thinking back towards bodies of work already in existence. This is not to say however that that grounded theory adopts an atheoretical stance. Rather research sensitivity is encouraged, with considerations of how the researcher's perceptions may be coloured. Therefore, the researcher should not be steeped too heavily in the findings of others, which may form expectations and outcomes that could influence what to look for. Instead, theory should be allowed to emerge from the data, rather than being forced into preconceived categories (Goulding, 2002).

It appears that Goulding (2002) offers a mediating stance between the two strands of Grounded Theory. Furthermore, the approach of Strauss and Corbin (1990, 1998) appears to be a more conventional, within the domain of doctoral studies. The researcher has chosen to follow Goulding's (2002) interpretation and further argues that in selecting the Delphi Technique, panellists are unlikely to favour theoretical frameworks presented in literature over their own practical real world professional expertise. Therefore, the Delphi Technique, which draws from the views of a panel of experts, embraces the ideals of Grounded Theory. It is a means by which data can be collected, which ensures the greatest likelihood of yielding generative and emergent theoretical frameworks.

4.3.1.1 Theory building

Van de Ven (1998) asserts that the central task and mission of academic management research is to contribute knowledge scientifically, and to apply this knowledge both to the discipline and profession. Furthermore, Van de Van (1998) finds that traditional theory-building guidelines proposed by Dublin (1969); Kaplan (1964); Kerlinger (1973); and Stinchcombe (1968) are inappropriate for many management fields, as they are unable to fulfil both of his proposed objectives. Eisenhardt (1989) advocates a grounded theory approach where an objective of generating theory is in an area where little is yet known. Creswell (1998); Kumar; (1999); Bryman (1989); and Saunders, Lewis and Thornhill (2003) argue that research questions are central to this process. The researcher has chosen to construct 'sensing' research questions, which:

- Create a porous boundary around the field of study

- Add texture and landscape to the identified phenomenon
- Set the agenda and vision for panellists' field and lens of consideration
- Necessitate resultant theory building

Yin (1994) categorises such questions as *explorative, descriptive* and *explanatory;* whilst Strauss and Corbin (1998) divide them into *sensitising, theoretical, practical and structural,* and *guiding.* Strauss and Corbin's (1998) grounded theory interpretation then carries this questioning approach into methods of data collection and analysis. With these in mind, the end product of research questions within grounded theory is to deliver an emerging substantive theory, which can explain the identified social phenomenon, or provide an alternative explanation. By linking emergent theory to existing literature as part of a hermeneutic cycle, generalisabilty can be enhanced. It is conceded that a research trade-off exists, which Weick (1979) suggests makes the delivery of simultaneously general, accurate and simple theories problematic. Corley (2002) argues that out of *generalisability, precision* and *realism* of a research strategy, only two can be optimised and the expense of the third.

Therefore, analysis liked with data collection uses a set of methods that generate an inductive theory about a substantive area (Glaser, 1992). From this, the researcher holds the delivery of theoretical *realism* to be the most important – which is achieved through *precision* in executing the chosen research methods. From this, based upon the calibre of the assembled panel of experts, *generalisabilty* is likely to be achieved.

A hermeneutic cycle relies upon the constant comparison of theories. *Memoing* and rewriting memos is key component in this process. Glaser (1978) describes memoing as the bedrock of theory generation; with memos being "the theorizing write-up of ideas about codes and their relationships as they strike the analyst while coding" (Glaser, 1978 p.83) As an extension of memoing, the researcher chose to publish conceptual papers in specific areas surrounding the area of doctoral study [which are listed]. This was in order to: practice theory-building, without jumping to conclusions concerning the overall doctoral research study; and to obtain peer-review feedback. These conceptual propositions were further ratified by the fact that the researcher's papers were successfully published.

4.3.1.2 Coding procedures

Grounded theory calls for systematic three-stage coding - where data is inductively reduced into theoretical codes, resulting in a final emergent theory. Based upon Flick's (2009) summaries, the three stages are and defined as:

1. **Open coding**: codes are interpreted and categorised into higher concepts, until core categories emerge. Text is regularly addressed with basic questions such as
   a. *What?*
   b. *Who?*
   c. *How?*
   d. *When? How long? Where?*
   e. *How much? How strong?*
   f. *Why?*
   g. *What for?*
   h. *By which?*

2. **Axial coding**: relationships are established with core categories inductively and deductively, to generate second order sub-categories
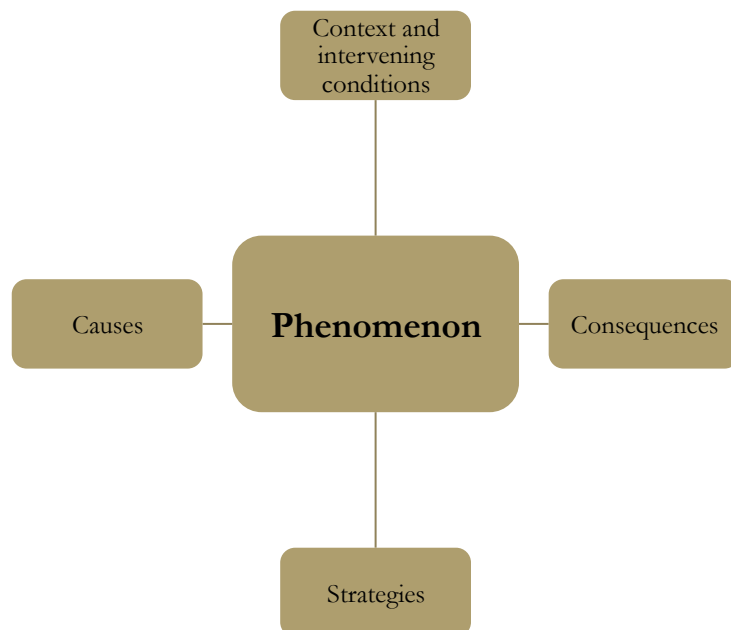
Figure 16 Axial coding approach

3. **Selective coding**: axial coding is continued to a higher level of abstraction. Emergent theory is identified refined and reaches saturation (i.e. further coding, enrichment of categories, and so on no longer provide or promise new knowledge) - with emergent integrated themes, surrounding *one* central phenomenon

How these codes have been created and mapped to the Delphi response data collected will be discussed in more detail in the subsequent chapter. Where possible, *In vivo* codes were preserved throughout the research process. Namely, holding the language used by panellists as being significant. The role of the researcher is to collate the views of panellists In vivo, within the various rounds of the Delphi Technique. It is acknowledged that tautologies may be present in the summarised views of panellists, where the same thing may be said twice, but in different ways. However, rather than this being merely duplication or a fault, the researcher held this to be an essential part of knowledge and theory building. Aristotle (1954) suggests that within the philosophy of rhetoric [Figure 17], a duty lies in considering matters where there may be an absence of arts or systems to offer guidance. Therefore, *In* vivo panellist coding and alternatively researcher generated contingency approaches to coding, as an auxiliary method, are managed during generative and emergent theory building.
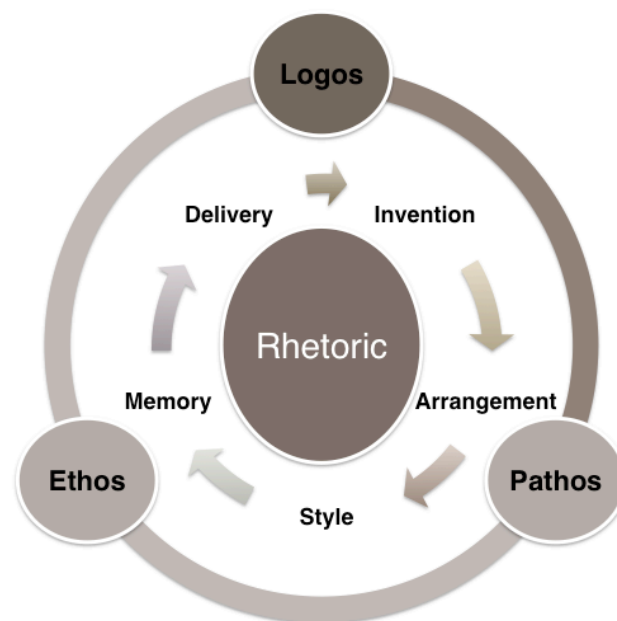
Figure 17 Cornerstone of ancient rhetoric (Wilson, 2011c)

In concurrence with the suggestions of Yin (1994), analytical procedures in qualitative research rely upon *pattern-matching* and subsequent *explanation building*. Through these, meanings lead to understanding and theories are the vehicle for propagating knowledge.

4.3.2 The Delphi study

4.3.2.1 Delphi origins

Delphi's etymology links it with *matrix* – both of which convey concepts of 'womb', 'origin', 'mother', 'sense of place' and 'medium where something is developed'. Similarly, *Dolphin* shares the same root as Delphi, and the ancient Greek god Apollo assumed dolphin form, when visiting his sanctuary in the site of Delphi, in lower central Greece. Within ancient Greek mythology Delphi was the place where the god Apollo reigned and protected the navel of the Earth. It is also considered to be the genesis for the modern Olympics. It was in Delphi where Apollo communicated through a priestess oracle and the future was predicted (Charles-Picard, 1969; Baxter, Cargill, Chidester, Hart, Kaufman and Urquidi-Barrau, 1978). Her words were recorded and then subsequently interpreted and debated by others.

From its roots, it is clear that the Delphi approach attempts to predict what will happen in the future (Bowles, 1999) - through group discussions, orchestrated by a focal point of contact, concerning phenomena (and in some cases noumena), by means of collaborative mediation. In addition, the Olympic ideals of celebrating egalitarian competition of the finest specimens and the celebration of cultural heritage, offer an emotive backdrop to the narrative of Delphi ideals. Namely, the participation of experts. Furthermore, the concept of gestating and giving birth to 'something', provide insight into an underpinning mission, which is argued Delphinians seek to achieve.

4.3.2.2 The Delphi Technique

These norms, values and processes in the pursuit of excellence and erudition have been crafted into what is conventionally termed the *Delphi Technique.* More recently in the twentieth century, the Delphi technique was popularised by the USA Air Force RAND (**R**esearch **A**nd **D**evelopment) Corporation, in the 1950's, with 'Project Delphi' being used as an instrument to predict the outcome of Russian nuclear bomb strikes (Everett 1993). Such usage is indicative of its

potential and ability to gather a spread of opinions, in response to current problems, from a panel, usually of informed experts.

The Delphi technique is used as a survey research method to structure group opinion and discussion (Bowling, 1997). The Delphi technique is seen as a means by which one can "obtain the most reliable consensus of opinion of a group of experts... by a series of intensive questionnaires interspersed with controlled opinion feedback" (Dalkey and Helmer, 1963 p.458) [Figure 18]. Delphi is intended to capture the positive attributes of interacting individuals, such as synthesising knowledge from a range of sources; and at the same time remedy negative aspects such as individual, social, professional and political conflicts. Furthermore, the Delphi method allows input from a greater number of participants than can feasibly and meaningfully be achieved through group meetings.

Round Two Delphi
- Ideas
- Knowledge
- Expert Panel

Round One Delphi
- Focussed Ideas

Round Three Delphi
- More Focussed Ideas

Termination of Delphi Study
- Completely Focussed Ideas
- Consensus
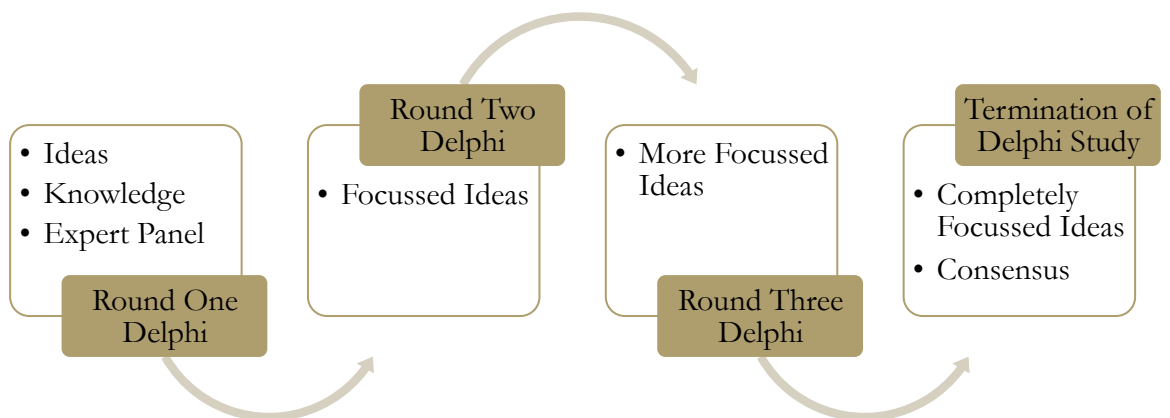
Figure 18 Traditional Delphi Method

For this very reason, Bowles (1999) cites that there have been more than 1,000 research projects, which have used the Delphi technique, especially when looking to investigate practitioners' views, surrounding issues of topical interest. Baxter, Cargill, Chidester, Hart, Kaufman and Urquidi-Barrau (1978) cite that the term 'Delphi' is now applied to the complete range of group communications, from the more structured, right through to face-to-face discussions. Coates, Coates, Jarratt and Heinz (1986) assert that Delphi *"has become the most popular forecasting*

technique generally used in the United States by public and private institutions" (p.71). Linstone and Turoff (1975) suggest that it is a response to *"a demand for improved communication among large and/or geographically dispersed groups which cannot be satisfied by other available techniques"* (p.11).

It is conceded that since the time of writing of Linstone and Turoff (1975), there now exist other comparable methods of group communication, in particular the advent of Web2.0, use of social media and netnography. However, it is argued that the rationale behind these new methods and many of the techniques employed still follow the ethos of Delphi. Therefore, what Delphi offers is a paradigm and structured mind-set.

4.3.2.3 Characteristics of the Delphi Technique

The Delphi procedure is characterised by four features: (1) *anonymity,* (2) *iteration,* (3) *controlled feedback,* and (3) the *aggregation* of group response. Through these, individuals are more able to consider and express the merits of data and their judgments, away from spurious and invalid criteria, which are often driven by associated pressures linked to a lack of anonymity (Goodman, 1987).

Keeney, Hasson and McKenna (2001) observe that complete anonymity may not be guaranteed, however they suggest that: firstly, complete anonymity may lead to a lack of accountability [although the researcher considers this to be of more significance when investigating more 'serious' issues, such as a military force considering whether to invade or not]. But more importantly, second of all that some panel members may know each other, but may be unable to attributes to specific members. The researcher considers this second point to be more crucial and supportive of why the Delphi technique has been chosen. McKenna (1994) choses to use the term 'quasi-anonymity' and suggests that confidentiality controlled by the researcher is of more importance than complete anonymity. In addition, as anonymous iteration gifts individuals the opportunity to reflect upon and change their views, which are also influenced by peers and without a loss of face: the depth, authenticity and ability to problem-solve is strengthened.

Consensus, which is a group judgment, is the result of: iterations; controlled feedback, orchestrated by the researcher; and the subsequent aggregation of data. These are held to be a collective obligation of the researcher and the panellists. Consensus consists of all group member's contributions, rather that just the most vocal. It is therefore seen as being an equal weighting of the group members' contributions, which may take the form of a statistical average. The advantage of this approach is that a spread of opinions can be used as an indication of strong consensus, which is otherwise often an untenable position in more quantitative studies.

However, this is not to say that Delphi studies avoid eliciting quantifiable responses – in fact the opposite is true. Delphi generates both qualitative and quantitative data (Stewart, 2001). In subsequent rounds, following more unstructured questioning, Delphi studies tend to encourage participants to quantify their qualitative opinions and judgments (Tritter, Dakin, Evans and Sanidas, 2003). Furthermore, throughout the study the researcher employs methods of analysis which seek to code, group, rank, qualify and quantify data – driving the shaping process of data into information and ultimately a body of knowledge. Stewart (2001) suggests that in the first stages, the researcher reduces data to fit categories, rather than exploring the meaning of statements. From this, the researcher sets out to employ standardised and objective techniques, which form the basis of interactions with participants.

As the Delphi technique relies on the experimental knowledge of a panel of experts (Powell, 2003), it is a process for making the best use of information, ranging from scientific data to collective wisdom (Black, Murphy, Lamping, McKee, Sanderson, Askam and Marteau, 1999). In this, it offers concepts imbedded in quantitative and qualitative techniques – such as attitudinal measurements and open-ended questioning (Bowles, 1999). In addition, it is able to minimise the limitations whilst maximising the benefits of surveys and consultative processes (Jairath and Weinstein, 1994).

4.3.2.4 Appropriate number of iterations

McKenna (1994) describes Delphi as a multi-stage process, built around iterations. vanZolingen and Klaasen (2003) discuss that through iteration, data collection and feedback continue until a stability of responses has been reached. Brockoff (1975) reports that whilst the number of rounds is variable, Delphi studies seldom go beyond one or two iterations (3 rounds). As a reminder, it is worth noting however that consensus is not the end-game. Consensus is a means by which the investigation of a phenomenon is being attempted. Dalkey (1975), Parenté and Anderson-Parenté (1987) consider what has been termed a 'Theory of Errors', which assumes that the aggregate of a group will provide a judgement that is superior to that of the individuals within a group. Namely:

- When the range of individual judgements excludes the true answer (T), then the median (M) must at least be at least as close to the true answer as one half of the group
- But when the range of judgements includes T, then M must be more accurate than for more than half of the group.

And so, with each iteration, the less accurate panellists will realise their relative lack of knowledge and be drawn towards the median value in subsequent rounds. In contrast, more accurate panellists will realise their relative level of knowledge and maintain their judgements. Therefore, the median response for the entire group, M, should in fact move towards the true value T, over rounds. In addition feedback between rounds dampens the pull of M, which might otherwise produce bias and a movement away from 'truth'.

4.3.2.5 Validity of consensus

Having stated the Delphi position on unearthing knowledge beyond truisms, it is also important to note that the Delphi cannot be assessed according to the usual psychological test criteria of reliability and validity. Rather, it is a procedure for "structuring a group communication process so that (it) is effective in allowing a group of individuals, as a whole, to deal with complex problems" (Linstone and Turoff, 1975 p.3).

Delphi employs the Lockean system – where truth is experimental and the perceptual accuracy correlates to the consensus held amongst those perceiving (Mitroff and Turoff, 1975). Therefore, consensus achieved by the majority of a panel of experts, equates to validity. Dalkey and Helmer (1963) suggest that implicit in Delphi studies is the ability to address the theoretical aspects of groups that hinder their accuracy of individual and collective judgments. Furthermore, consensus is held to be a technique, which enhances judgmental validity and accuracy (Dalkey, 1975). Goodman (1986) writes that the use of experts increases the content validity of Delphi studies as a tool for data collection.

4.3.2.6 Delphi's Suitability for doctoral studies

Particularly within doctoral studies, Skulmoski, Hartman and Krahn (2007) suggest,

> *"The Delphi method is well suited as a research instrument when there is incomplete knowledge about a problem or phenomenon"* (p.1). Furthermore, it *"works especially well when the goal is to improve our understanding of problems, opportunities, solutions, or to develop forecasts"* (p.1).

Their paper makes reference to 34 identified doctoral theses that used the Delphi technique, during the period of 1981-2006, within the social sciences. Further desk reviews have yielded findings, which indicate that especially within the past 30 years, Delphi studies are used particularly within the field of social policy and public health - where there is a focus on the systematic evaluation of societies' responses to social need.

A further area of consideration is the time that it takes to collect data. Delbecq, Van de Ven and Gustafson (1986) find that the minimum time required between rounds is 45 days. As a part-time doctoral student, the researcher paid particular attention to this point – as it was an area of concern. With such a diverse panel, hailing from different organisations and based in different countries, being asked to provide a significant amount of data: the researcher was acutely aware that deploying 'soft power' methods was vital. This was embraced as positive facet of this research for two reasons. Firstly, the researcher was able to demonstrate mastery over complex research methods, through being able to motivate and elicit responses from a panel of experts, whom the researcher had few incentives

to offer and limited resources to manage. Secondly, the extended time taken when gathering data allowed the panellists greater time in which to reflect upon and revise their responses.

4.3.2.7 Delphi's Suitability when investigating cultural brand management

Allegorically, the 'health' of brands and their associate stakeholders, from a cultural context, requires examination, diagnosis and more than a palliative prescription - in order to ensure future sustained relevance and advantages. With this in mind, a research approach was selected that was equipped with the ability to elicit detailed futurist perspectives, from informed professionals in their field.

Furthermore, the Delphi instrument contains within it a reflective component of collaborative and cumulative iteration - which allows for greater knowledge building and gathering, when investigating a research problem. Comparably therefore, it is argued that the same methodological concept is well placed to examine the drivers and traits observed within other societal responses and needs.

In this instance, the areas in question are the increasingly complex observations of post-modernist perspectives surrounding societal brand and cultural phenomena.

In support of this stance, analysis of the UK healthcare profession sees a greater concern towards cultural context, management issues and consideration of multiple stakeholder healthcare-patient relations. Likewise, business and management literature, and specifically here branding, seeks to capture the interconnected experiences of internal and external stakeholders, in response to observed phenomena. In some ways practitioners see themselves as being able to administer a prescriptive brand proposition to identified consumers' needs - like a doctor to a patient.

Also, the hallmark of a brand practitioner lies in their ability to quantify, package and present, that which by its nature is largely qualitative. In response to this construct, the lens of analysis focuses thinking towards the fusion of qualitative

and quantitative methods, investigating perspectives of the 'doctor', or brand practitioner.

A further point of consideration however, is having created a lens, whether this refractive process of analysis, is ably positioned to shed sufficient light and reflect the full spectra of constituent parts. It is argued therefore that iteration, over a sufficient period of time, offers a cleansing mechanism and polishing process, to help minimise unwanted refractive distortions, when examining elements of observed phenomena.

4.3.2.8 The use of experts

As suggested, based upon its various origins, Delphi studies rely upon the combined and cumulative expertise of a panel of experts (Powell, 2003). What defines an expert however, may yield a difference of opinion. Furthermore, it could be argued perversely that expertise may result from participation in such a dialectic and iterative process. Therefore, this would suggest that Delphi techniques could be used as a pedagogic tool for transferring knowledge and developing expertise.

Bearing this in mind, rather than holding such issues as grounds for challenging the expertise of participants, the researcher suggests that these arguments provide a mechanism for strengthening this methodological approach towards extracting and data mining useful data. Secondly, it also removes the burden of searching for narrow definitions of experts, directly related to the research problem at hand. For, it could be debated that if there existed such a body of professional experts individually able to problem-solve the identified phenomenon, then why do there remain such unanswered questions?

Hasson, Keeny and McKenna (2000) suggest that experts should be representatives of the target population. How the researcher has defined representation will be discussed later. McKenna (1994) defines experts as 'informed individuals'; Goodman (1987) defines them as 'specialists' in their field; whilst Green, Jones, Hughes and Williams (1999) observe that experts are those who have knowledge about a particular subject. Kennedy (2004) suggests that

through describing panellists fully, judgments can be made about their credibility.

4.3.2.9 The importance of Participant Observation in Delphi

An essential part of a Delphi study is deciding how and where to look for panellists. Participant observation methods were used as a basis for establishing this and supporting Grounded Theory methods to collecting literature. As a senior lecturer and experienced marketing practitioner, the researcher chose to recruit potential panellists from two sources: international conferences, and professional training courses.

Whilst four categories classifying the role of the researcher have been identified, (Junkers, 1960; Roy, 1970; Vinten, 1994; Gill and Johnson, 2002); the aim was to occupy the first quadrant and become immersed as a complete participant. The journey from observer to participant was circumnavigated in accordance with Junkers (1960) position. Namely, the researcher as a participant and observer, made overt investigations and made it known that research is a core interest. The value of this approach was that the researcher was not tied down and "is free to move around as research interest beckons" (Junkers, 1960). Furthermore, this qualitative subjective sociology method offers a bridge towards concerns when collecting data, that *what is said* [by participants]*, is not always what is done* [by participants] (Bogdewic, 1992; DeWalt et al, 1998; Jorgensen, 1989; Analoui and Kakabadse, 1992; Gill and Johnson, 2002; Oliver and Eales, 2008).

Grounded Theory is used as a generative processes, where emergent theoretical frameworks and models are developed. The instrument for this is the Expert Delphi Study, which utilises the Socratic elenchus method of problem solving [which will be discussed later]. Participant observation methods start this process, and govern the approach and areas covered within background theory. From this the Expert Delphi Panel was selected, where they can then begin to reflect upon and contribute to identified key themes. As in iterative process, it is quite possible that nature and focus of the themes will shift - yielding additional erudition and dialectic interplay, which will then help to formulate the structure

of the problem solving and subsequent results. Participant observations therefore offer touchpoints and anchors for evaluating Delphi and Socratic methods.

4.3.3 Socratic method of questioning and problem-solving

When drilling down practically how the Delphi method needed to be orchestrated, an appropriate method of questioning was needed, that would guide endeavours towards problem-solving. In further support of a research approach that: (1) has a strong backbone of conceptual theory building around phenomena; and (2) clearly draws from classical ancient Greek philosophers: it seemed only natural that the researcher would select another comparable technique and supportive method. It was decided therefore that the Socratic method of elenchus, fulfilled those criteria.

The Socratic method in its purest sense is used to investigate the unknown. It takes its name and origin from the ancient Greek philosopher Socrates, who lived in Athens between 470 and 399 BC. Within this approach, opposing viewpoints are encouraged - to stimulate the process of rational conclusion, through the ability to occupy a defensible position. And so, the researcher argues that this is a perfect tool for investigating and bringing out into the open such things as: intangibles, reciprocity; tacit and intrinsic traits. Furthermore, it encapsulates the ideals of the Delphi technique – from both a top-down (macro) and bottom-up (mirco) perspective.

Skordoulis and Dawson (2007) suggest that, "When thinking Socratically, people discover that they cannot clearly define ideas and concepts that they previously held with certainty. This awareness in turn inspires further curiosity and open-minded reflection (Nelson, 1940)" (p.993). From this it is clear that a Socratic approach is both appropriate and necessary for the researcher and Delphi experts - in order to arrive at a deep-structured, valid and worthwhile consensus, which is resistant to harmful sclerosis.

With the Socratic elenchus, which is a dialectical method of problem-solving using inquiry, the balance of rationality often seesaws between participants and the researcher, until an equilibrium and conclusion are reached. The rationale

being that critical thinking is honed through questioning, which tests boundaries and homes in on paradoxes and anomalies (Ruppel, 2003; Rhee, 2007; Overholser, 2010). Therefore, as a research approach, it strengthens arguments and findings by using a negative method of hypothesis elimination – which in turn tests commonality, consistency and context. With the Socratic method, whilst an explicit answer might not be arrived at: a consensus, which more closely represents truth and reality, is achieved. This philosophical method also shares parallels with that of the 'Theory of Errors', as discussed earlier (Dalkey, 1975; Parenté and Anderson-Parenté, 1987).

To conclude and summarise the structural approach of the Socratic method, Skordoulis and Dawson (2007) provide three main techniques and lenses of analysis, which the researcher in turn adopted:

1. Refutation of what was thought to be known (*elenchus)*
2. Making latent and tacit knowledge conscious, giving birth to hidden knowledge *(maieutics)*
3. The distinction between three types of knowledge, comprising of: scientific *(episteme),* professional *(techne)*, and practical wisdom *(phronesis).*

It is also apparent that parallels and similarities can be identified between Delphi and Socratic methods in:

- Framing the process of knowledge gathering as being something 'maternal' – having a gestation period, which results in a 'giving birth'. This also ties in with Grounded Theory ideas - that theory building is generative and emergent
- Expertise, through 'professional', measured, structured and stepwise execution of thinking and actions
- Wisdom has to be pragmatic and grounded in real-world reality.

In further support of Delphi and in the interests of improving performance, by the researcher and panellists, dialectic iterative discussions were undertaken with participants - using a hermeneutic cycle of problem solving, as outlined by Wilson (2011a, 2011c) [Figure 19].
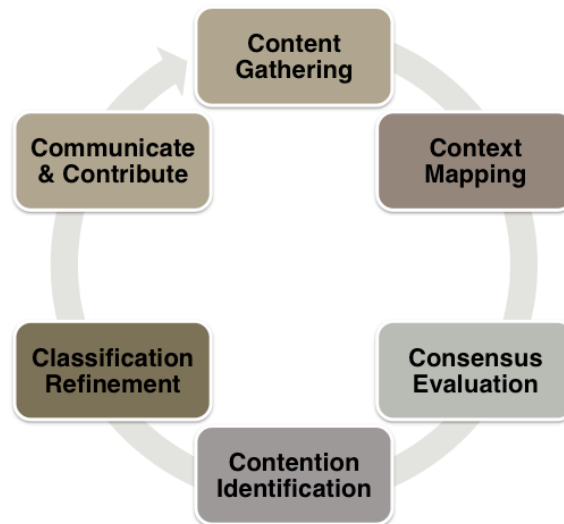
Figure 19 Intuitive hermeneutical cycle of data analysis (Wilson, 2011a, 2011c)

The unit of meta analysis was one that considered the most significant sentiments expressed, in connection with perceived critical factors. Once emergent themes had been identified, attempts were made to further refine findings, through holding participant consensus as a filter for purifying and validating observations. Participants were encouraged to reflect also on the views of their peers – by occupying an additional dissociated position, from that of their personal opinions. The aim was to snowball the sample size, in a form of virtual hermeneutic role-playing, which takes advantage of their professional expertise and experience. Furthermore, it was considered that this would enrich the Socratic dialogue by gathering further perspectives, without muddying the channels of dialectic discussion, through too many voices at the same time. It is argued that knowledge elicitation, through encouraging professionals to problem-solve on behalf of peers, follows the same fundamental principles as Appreciative Inquiry methods, used by Cooperrider and Shrivasta (1987), (2005) [outlined in Appendix 2]

In support of using the study of broad-based varied media as a basis for inductive reasoning, the author also cites Benedict (1950), who is a recognised landmark for cultural anthropology. Benedict was commissioned by the United States government to write a cultural analysis of the Japanese in 1944 during their war,

in order to predict their mind-set and behaviour. Benedict had never been to Japan and drew from anything: from academic books and interviews, right through to art, visual media and movies. Her methods offered an opposing view and set of conclusions to that held at the time. History now shows Benedict's position to be more accurate – in that the Japanese could embrace democracy, live as a pacifist nation and would not challenge occupation. With this in mind the author holds Benedict's perspective to be of particular value to the study of brands in connection with culture – as they are embedded in everyday communication and promotional marketing communications, such as: product placement, advertising, public relations, ambient media, corporate literature, packaging and social media.

4.4 Appraising decision-making in research

The following section considers decision-making processes, then appraises them in connection with Delphi studies. In short, research drawing from a group of experts is motivated by the belief that 'n+1' heads are better than one (Hill, 1982). This is theoretically underpinned by the process of combining individual judgments, which in turn should lead to 'process gain' and the outperformance of any individual group member, with regards quality of decision-making (Hackman and Morris, 1976; Sniezek and Henry, 1989). Thus, it can be considered that key facets of undertaking research necessitate an appraisal of both the researcher and participants' ability to make decisions; and the various lenses of analysis used to make these decisions.

4.4.1 Defining decision-making

Carroll and Johnson (1990) define decision-making as a mental process, whereby individuals or groups identify and make *choices* or *judgments.* These are made through selection processes, which gather and evaluate information about alternatives. Having argued that choices and judgments are related to at least two tasks, a further distinction between the two can be made.

Judgements are inferential cognitive processes, where tasks are compared and matched, attributable to some form of scale. Here, individuals and groups draw conclusions about unknown quantities or qualities, based upon the information available.

In contrast, choices involve comparisons and selections from a number of available alternatives. It is conceded that often little is done to distinguish between judgments and choices, with the two terms being used interchangeably.

The researcher and participants are invariably encouraged to make choices. However, for the purposes of this research, it is asserted that *judgments* in connection with decision-making are of greater interest specific to the research problem and so offer more value. In turn, investigating how judgments are made becomes of more significance when constructing theoretical frameworks and forecasting. From these, it is also worth considering how the best pool of individuals is selected, to ensure optimal levels of erudition. This in itself raises questions, as discussed by Larreché and Moinpour (1983), as to whether integration or identification strategies yield more satisfactory talent selection of decision-makers. How the sample of decision-makers was selected for this study will be discussed in more detail later.

4.4.2 The economic landscape of evaluations

When looking at decision-making in general, Edwards (1954) provides an economic decision construct, known as the Subjective Expected Utility Theory – where good decisions rely upon the combination of two independent types of subjective information:

1. Probabilities attached to the occurrence of events, and
2. Values or utilities, which are attached to the outcomes of those events.

In Subjective Expected Utility Theory, events and outcomes are ascribed probabilities and utilities, which are then combined to propose a selection with the highest manipulative score. This rational approach, which supposes 'economic man', has attracted criticisms; with challengers suggesting that human decision makers do not necessarily perform according to normative model

predictors (Wright, 1884; Hogarth, 1987; Dawes, 1988; Watson and Buede, 1987; Von Winterfeldt and Edwards, 1986). Rather, it is suggested that 'administrative man', as defined by Simon (1945, 1976), possesses 'bounded rationality', due to limited knowledge of possible alternatives and abilities to evaluate only several simultaneously. Therefore, decision makers work towards a simplified model - driven by satisficing, rather than maximising behaviour, which delivers 'enough', instead of a maximum. It is argued that this is a key point worthy of reflection because:

- Literature points towards Branding, Culture and Management as being governed by bounded rationality
- Doctoral studies and the researcher by their very nature are bounded, due to time constraints and resources
- Participants are bounded in their professional judgment and ability to contribute to the study
- Resulting research analysis, theoretical frameworks and forecasting are considered to be bounded.

This point offers a strong argument for qualitative antipositivist research, which considers lenses reality and levels of interpretation. In addition, it points to a paradigm that offers theories and Delphi studies as having to fulfil more inclusive definitions of satisfaction - beyond purely reducible, linear and static figures. Furthermore, it would appear to dove-tail the proposed methodological research endeavours with the observation that brands, culture and managers challenge the over-simplified idea that each can and should conform to prescriptive exemplars and ideals. Therefore the added value of such research and findings grounds them in unearthing the processes of decision-making and the things in which they are anchored. Namely, they preserve significant facets of current knowledge and understanding, which may otherwise perish and become difficult to resurrect in the future, without colouration.

A polemical argument against bounded rationality and current judgment, could suggest that 'longitudinal hindsight', moves decision-making towards economic man, imposing limitations upon the here and now. However, it is argued that either is not mutually exclusive. Rather, doctoral research and specifically here Delphi studies have to balance heuristic evaluations. Tversky and Kahneman (1974) categorise heuristics according to:

- Availability
- Representativeness
- Anchoring, and
- Adjustment.

These in themselves can lead to systematic biases, where invariably participants arrive at heuristics judgments based upon a blend of: frequency, likelihood, recency, familiarity, emotional saliency, lack of cognitive skills, and appropriate skills applied incorrectly – each of which may become difficult to separate. In response, three points are made:

1. Supposed biases may actually reflect valid approaches to complicated and uncertain situations (Cohen, 1979; Bazerman, 1984; Fischhoff and MacGregor, 1983)
2. The purpose of an Expert Delphi study is to reduce the likelihood of non-desired bias, by consensus being arrived at through iteration, interaction and resulting from a panel of experts – who are free to reflect and revise their reviews; and away from the pressures associated with direct people-to-people interactions and named contributions
3. Errors of judgement may represent scientific or mathematical ignorance; or even the fact that in may not be possible to measure optimal or rational decision-making holistically (Cohen, 1981; Einhorn and Hogarth, 1981).

Two further factors are considered when undertaking and analysing research:

1. The ecological validity of research conditions, in being able to replicate work conditions and tasks (Kruglanski, Friedland and Farkash, 1984)
2. Generalisability, in response to the static nature of laboratory tasks, as opposed to the dynamic nature of the real world (Hogarth, 1981).

Delphi studies are largely used to tackle real world problems. Also, the length, nature and iterations of the study, equip it with the potential to demonstrate generalisability – according to its ability to respond to environmental factors, through following the individual and collective journeys of the researcher and participants. Furthermore, it is argued favouring this approach over more quantitative linear models, which attempt to construct and identify predictor variables. The reason being that extrapolational and predictive linear models cannot be constructed successfully, because they are ill equipped to address complicated real world phenomena; and they invariably attempt to suppress human involvement - which appears to be a key factor for consideration when investigating branding, culture and management. Also, whilst reflecting again on

hindsight and its effects on bias, Slovic and Fischhoff (1977) suggest asking subjects to explain those outcomes that did *not* happen.

4.5 Data collection

4.5.1 Assembling a sample of 'judging' experts

The iterative hermeneutical cycle of investigation aims to bring into the open tacit held views and the reflexive nature of researcher's presence. The argument being that the researcher is an integral part of the research process and this will influence who and how panellists are assembled. Therefore, a key endeavour was ensuring that the panellists were worthy participants according to their expertise and ability to contribute to new knowledge - rather than simply just fulfilling the role of data providers. Furthermore, ensuring that the researcher had the appropriate expertise to identify and recruit such individuals was also key.

Challenges exist when investigating a phenomenon and emerging trends for which there may be a paucity of literature and empirical data. In tandem, similar challenges will arise when attempting to assemble an appropriate panel of experts. Observations by the researcher based upon participant observations and pilot study data, collected in tandem with literature searches, are used to refine the field of study. Furthermore, through collecting data at the outset, in line with Grounded Theory, this centres literature searches in the heart of the problem; helping to identify gaps, emergent themes and ensuring alignment with the phenomenon.

Delphi offers a method by which a consensus of understanding can be reached in a wider context (Woudenberg, 1991). Mead (1993) suggests that the best way to assemble a panel of experts is to draw well-defined inclusion criteria. As is suggested in Grounded Theory, Norwood (2000) recommends the deployment of purposive sampling, where the knowledge of a population is used to select the elements that constitute the study sample. The sample of experts was therefore selected using non-probability purposive theoretical sampling techniques, derived from Grounded Theory methods (Glaser and Strauss, 1967; Eisenhart,

1989; Glaser, 1992; Strauss and Corbin, 1998; Goulding, 2002). In addition, Criterion sampling was employed (Creswell, 1984), filtering participants. These were held to be significant, in terms of both quality control and in attempting to unearth the most significant emergent themes, with respect to professional stakeholders.

Delphi's epistemology focuses on soft data and soft laws, dealing with areas that do not lend themselves to more traditional approaches (Helmer, 1977; Mullen, 2003). Cavalli-Sforza and Ortolano (1984) observe that a typical panel has about eight to twelve members (p.325) and Linstone (1978) finds that a suitable minimum panel size should consist of seven members (p.296). Goodman (1987) notes that the architects of Delphi "tend not to advocate a random sample of panellists . . . instead the use of experts or at least informed advocates is recommended" (p.730). Beretta (1996) suggests that "Representative sampling techniques may be inappropriate when expert opinions are required" (p.83). However, Linstone and Turoff (1975) prescribe that validity of results is preserved through the heterogeneity of participants.

As a means of harmonising the positions of Kennedy (2004); Green, Jones, Hughes and Williams (1999); Beretta (1996); McKenna (1994); and Goodman (1987); the author has chosen to gather the following data: as a basis for both appraising expertise and also for further analysis of responses:

Professional Brand, Culture and Management Expertise
- Ability to articulate deep-structured concepts in English
- Level of education
- Years of professional experience
- Current job title and brief description of role
- Previous job title and brief description of roles
- Company names/brands worked for/on
- Industry sectors worked in
- Countries worked in

Wider underpinning Brand and Cultural value systems
- Passion in the research area, willingness to participate over approximately 12 months and make a valid contribution

- Countries lived in
- Ethnic background and cultural heritage
- Any other social and/or family ethnic/cultural ties
- Languages spoken and proficiency
- Hobbies/interests
- Personal favourite brands, with brief description why
- Personal dislike of which brands, with brief description why

A cross-section of levels of experience, from junior right through to senior decision makers was gathered. The rationale behind this was to examine whether views change according to levels of qualifications and work experiences – such as levels of accountability, exposure to more brands and cultures. An indirect consequence of this, which the researcher also wished to investigate, was whether recent graduation from a formal academic qualification, or the responsibility of having to research conceptual problems within academia, affects the way in which participants articulate their views.

Also, it is argued that the expertise and experiences of individuals permeates public and private life, and are carried across both. Whilst it is understood that practitioners have a professional face, which represents the tip of the iceberg: through asking such questions the idea was to encourage participants to reflect deeply upon and draw from all of their knowledge. Furthermore, knowledge and culture are held to be dynamic constructs with different levels that require a 'peeling away' to reveal all aspects – each of which is linked and support one another.

Another innovation of the researcher when collecting and appraising panellists, lies in the concept of allowing participants to provide their own definitions and terms when answering the various biographical questions. Wilson (2010) and Wilson and Liu (2009b) employ a similar technique, which allows for subjects to use as many ethnic descriptors as they see fit. The argument being that what is most significant is how subjects see themselves, rather than how the researcher or society chooses to classify them, as is often seen for example in Human Resource Management (HRM), used when undertaking ethnic monitoring.

Current HRM thinking suggests that compliance, fair play, diversity, equality and strength of workforce are achieved through, at the very minimum, achieving levels of 'ethnicity' (which at times is synonymous with religious identity), which match the location and audience of the organisation. Moving beyond HRM concepts, the researcher argues that 'ethnicity' is only often skin-deep and may provide what is akin to a 'red herring' or 'mirage'. Rather, what are held to be of more significance are the norms and values that individuals acquire above their heritage – and collectively these produce hyphenated ethnocentric identities, which move away from geographic host and biological attributes. The researcher also observes that academic marketing research often collects data and triangulates on limited variables, such as: gender, age, current job, current industry, and country in which the data was collected. From a brand practitioner perspective, this would appear to be a starting point but less significant than psychographic variables.

Therefore, it is argued that if an individual has an 'interest', such as friendship and experiences, then these will enter that individual's value system and affect their judgement. For example, if a white European is married to a black African, lives in Portuguese speaking Brazil, and practices Japanese martial arts: then each of these other ethnicities, culture, languages and gender will permeate and 'colour' their opinions, in a positive may. This phenomenon has been termed by Wilson (2010) as *cultural surrogate hybridisation*. And so, more basic data collection may tick boxes whilst missing the point. Highlighting this point Wilson's (2010) paper is entitled '*When in Britain do what the British do - whatever that means...*', suggesting that in the real world, meaning and practices linked to definitions according to nationality in the modern world pose challenges. And so depending on the lens of analysis and appraising the biographic data collected, it is argued that two levels of abstraction are achieved, which demonstrate both sample homogeneity and heterogeneity.

In-keeping with Grounded Theory's approach to emerging themes and not being bound to a fixed body of literature, or overly restrictive group of subjects, two positions were adopted. Firstly, in a positive sense, if panellists chose to skip rounds, then this was not considered to be a problem, or an undermining the

Delphi research approach. Rather, it was a demonstration of panellists' agreement and reflective of the inevitable pressures of participating in such an exacting study. In assembling a panel of active professional experts, the trade-off is that they are likely to be knowledge rich and time poor. Furthermore, the fact that they had provided documented expertise and knowledge was still the most important facet of the process. This is supported by the fact that all participants had been met face to face by the researcher, agreed to contribute, and had invested time in providing detailed biographical data on themselves. Secondly, some panellists joined the study after the second round. This was held to be valid as they were still gifted the opportunity to contribute opinions and to challenge existing views. In addition, an argument is made for their inclusion acting as a mode for further testing the validity and generalizability of both the Delphi process and the body of knowledge present in the opinions. In order to conclude the study, consensus has to be arrived at – and so the permissibility of participants joining at a later stage was judged to be valid.

4.5.2 Pilot Delphi Study

A pilot exploratory study, which investigated and compared creativity in Brand Creation and Hip-hop music was completed by Wilson (2011a) and published in the *Journal of Brand Management*. Hip-hop music was chosen, as it was identified as a measurable phenomenon, which has crossed age, race, ethnicity, language, class, and geographic boundaries. It also has clearly defined elements, which are now understood by mainstream society as exhibiting traits of being both a commercial and socio-cultural commoditised entity. Furthermore, more importantly, it shares a strong affinity with branding, through its usage of marketing by marketers and consumers. To this end, a top-down, bottom up co-collaborative cultural lens approach was adopted. Following this, findings were also held to yield concepts, which could be generalised to wider branding, socio-political and business applications – with US President Barak Obama being cited as a notable case example of this approach in practice; also because he has been termed *"the first Hip-hop president"* in some quarters (Wilson, 2011a).

Hip-hop's patronage of brands within tribal, cross-border sub-cultures, demonstrates a process of evolutionary collaborative cross-fertilisation and

creativity. Consumption therefore is treated as an evolutionary process, which rather than making hard distinctions between producer/corporates/practitioner and customers/consumers, instead sees the lines blurring with soft factors and dynamic states of engagement becoming of more significance. Therefore, the mantle of ownership and attributable accountability of delivered sustained competitive advantage, is distributed between engaged stakeholders.

Findings indicated that participants' level of experience, ability to conceptualise and articulate views in response to questions, remain a key factor. Also, Wilson (2010a) writes that there remain challenges when seeking to galvanise multi and cross-cultural marketing views, even when English is the lingua franca. Therefore, an Expert Delphi approach, which investigates facets of tacit phenomenological knowledge, necessitates that participants are able to demonstrate a high level of intellect – and one that encourages the critique of both existing theoretical frameworks and societal practices. For this reason, practitioners were chosen as a source for investigation, as they are reflective of sustained engagement, a higher level of self-reflective consciousness - whilst also being able to adopt a position, which considers the views of other key stakeholders, as is the nature of their inherent professionalism.

Furthermore, a challenge remained concerning the grouping and synthesis of findings, following content analysis and hermeneutic approaches. In response to these, participants were invited to contribute through an iterative process, where it was argued that later rounds indicate consensus, through requesting that participants evaluate findings, according to level of agreement.

4.6 Data collection timeline

Following the pilot study, the Delphi instrument for doctoral study was mapped out, following a cyclical reflexive and iterative research process:

1. Exploratory Delphi Study (12 months)
   - Literature desk reviews, grouping of themes
   - Secondary data and covert netnographic participant observation methods (Kozinets, 1998)

- Hermeneutic cycle of analysis, harmonising collected data: reflection and revisiting body of evidence; refinement and expansion of body of knowledge base; identification of contention, overlap and consensus – leading to tentative preliminary theory building and laddering of research questions

- Expert knowledge elicitation through covert/overt participant observation and consultations, at conferences and in the workplace

- Execution and review of the Pilot Delphi Study

- Self-reflective formalisation of the researcher as a research instrument (Junkers, 1960; Roy, 1970; Vinten, 1994; Gill and Johnson, 2002)

- Spatial mapping, grouping and construction of the body of more formal knowledge base and scope of study

- Anecdotal presentation of the researcher's view and Delphi instrument to industry practitioners and academics - with the view of gaining tentative consensus on broad themes, further refining initial findings, and generating interest for Delphi participation.

2. Selection of Expert Delphi panel (6 months)

- Purposive theoretical sampling
- Overt participant observation methods – assessing suitability according to: experience; willingness to participate; rapport; cross-cultural exposure and appreciation; level of English communicative skills; conceptual thinking ability; evidence of expert excellence in management, branding and culture; engaged in active employment
- Formal recruitment of panellists
- Inclusion of mechanisms to: accommodate panel attrition, and search for and 'blood' in additional panellists after round one.

3. Expert Delphi Study – with a forecasted number of 3 rounds, over 12 months.
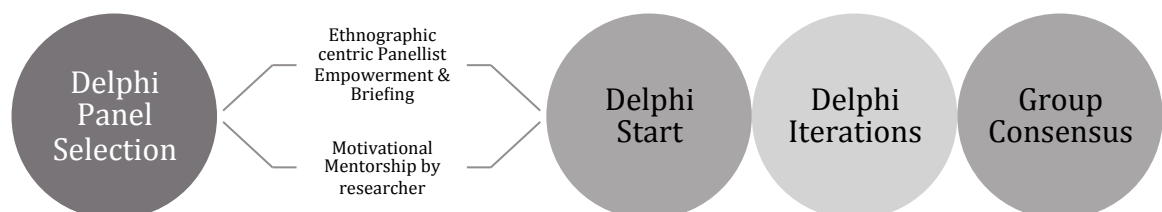
Figure 20 structure of Expert Delphi study

12 months was considered sufficient time to allow for depth, criticality, clarity and refinement of panel contributions. The aim was also to ensure the

establishment of tangible and necessary formalised group dynamics, lending themselves to purity and transmission of views - through participants understanding of the subject field and the Delphi instrument.

By guiding participants towards critical self-reflection and evaluation of identified phenomena, the aim is to extract tacit knowledge and understandings - resulting from:

- Raising and setting an agenda, through priming techniques, resulting from literature reviews, secondary data, and observations of phenomena.
- Participants' professional expertise excellence and exposures.
- Participants' formal academic grounding.
- What are held to be by participants, to be the most significant anecdotal personal cross-cultural experiences and insights.
- Consensus derived from anonymous panel contributions, having formalised group dynamics and purposes.
- The mediation and levelling effects of collaborative, egalitarian academic problem-solving - for the sole purpose of sharing best practice and striving for academic/practitioner excellence. Forced anonymous collaborations are enforced to help reduce personal bias and negative communicative transferences. Also, they aimed to preserve purity of knowledge transfer and elicitation of candid contributions – which may otherwise have invited racket feelings associated with direct and overt group contact socialisation dynamics, that collectively could curtail and impede the most tacit and valuable knowledge contributions.
- Attempts to safeguard against non-contributions. To this end, the removal of pressures associated with contributions, which carry direct rewards, or career implications were achieved, through tackling this outside of any corporate affiliation as a doctoral subject. These it is argued helped to preserve the free pursuit of academic knowledge.
- Motivating and engaging participants, with rapport building and subject area ambassadorship, by the researcher.
- The argument that an expert panel of professionals can have their views generalised and scaled – due to the fact that they demonstrate the ability to make continuous and largely sound judgments, evident from their continued gainful employment and academic history in this field [which will be discussed in more detail later in Chapter 5].

Detailed Expert Delphi round structure

<u>Personal biographies of panellists</u>

1. Structured biography questionnaire emailed to panellists

<u>Round One</u>

2. Structured and open-ended qualitative Delphi questionnaire emailed to panellists, with supporting guidance notes

3. Confirmation of questionnaire receipt

4. Further tailored support, discussions and clarification concerning Delphi questions - offered via one or several methods: face-to-face, email and telephone

5. Sensitive encouragement and motivational chasing correspondence: to improve speed of response; rapport; and researcher's ability to appraise panellists' underpinning approaches and perspectives - whilst attempting to maintain levels of commitment; and length and depth of responses offered

6. Collection of questionnaire and biographical responses. Elicitation of preliminary feedback from panellists: concerning the focus, value and execution of the Delphi study

<u>Round One data processing</u>

7. Grouping and tabulation of biographical data

8. Identification of contentions and consensus within questionnaire responses

9. Editing, grouping, structuring, and harmonisation of data – whilst preserving the meta language and various styles of panellists' responses

10. Consultation and comparison of data with continuing literature reviews. Accommodation of panellists' perspectives concerning body of literature presented, leading to further literature studies and inclusions

11. Reflection on nature and successes of Round One questions and their suitability for Round Two

12. Formalisation of Round Two questions – with mapping of Round One panellist responses under questions. Inclusion of a percentage quantitative mark sheets to test level of consensus

<u>Feedback and Round 2</u>

13. Introduction of additional panellists: requests for new panellists' biographical data; collection of biographical data and inclusion in existing tables

14. Formal reflective feedback narrative on the Delphi study emailed to panellists

15. Structured round two Delphi questionnaire emailed: under which Round One panellists' edited responses appear – with clear indications and signposting as to where contentions and consensuses exist

16. Confirmation of questionnaire receipt

17. Comparative support and guidance, as offered to panellists in Round One.

18. Confirmation of receipt of questionnaire

19. Sensitive encouragement and motivational chasing correspondence

20. Collection of questionnaire responses

Round Two data processing

21. Appraisal of level of consensus, using percentage scores provided by panellists

22. Further identification and refinement of contentions and consensus within questionnaire responses

23. Further editing, grouping, structuring, and harmonisation of data – whilst preserving the meta language and various styles of panellists' responses

24. Further consultation and comparison of data with continuing literature reviews. Continued accommodation of panellists' perspectives concerning body of literature presented, leading to further literature studies and inclusions

25. Reflection on nature and successes of Round Two questions

26. Decision to call a termination of the Delphi study - based upon percentage scores and quality of meta data

Feedback, Round 3 and conclusion of study

27. Formal reflective feedback narrative on the Delphi study, average percentage scores and grouped summarised responses emailed to panellists

28. Confirmation of panellists' agreement in consensus and termination of study

29. Elicitation of summary feedback from panellists: concerning the execution of the Delphi study, panellists experiences and the competences of the researcher

30. Commencement of detailed and reflective holistic analysis, by the researcher of: Delphi study, data, literature, research experience and doctoral process.

4.7 Limitations

In addition the limitations already considered and addressed, several further methodological limitations have been considered, which range from those:

- Inherent in the method and instrument themselves
- Associated with the researcher
- In the data
- Associated with the research participants

Following these, the most significant have been listed:

1. Does the data collected reflect the fact that: theories have been tested; or brands have been tested; or the panellists' knowledge and understanding; or all three? It is judged that as the data is the culmination of panellists' views, it may be difficult to categorically prove which of these have been arrived at.

2. Is sufficient background and focal theory transferred to participants – or should this happen at all, as it may add bias? If transference is judged to add bias, should a more naturalist approach be followed, using methods such as netnography and covert participant observation methods.

3. Due to the inherent nature of an expert study relying on the involvement of the researcher as a motivator and personality, that panellists have to 'buy into', how replicable is this study for another researcher?

4. While anonymous, some earmarked panellists expressed an interest and a desire to be involved, but declined for various reasons. For example, one individual worked for a brand research company and feared that involvement and expression of views may impact on current and future client relations – i.e. they did not want to make negative comments about brands, academics or theories.

4.7.1 Possible alternative approaches

Having considered potential limitations associated with the chosen method, research instrument, data collection approach and chosen participants; the following alternative approaches were considered.

1. **Expert Delphi using quantitative methods throughout.** A Delphi study could be undertaken with quantitative data collection being the focus of each rounds. For example employing the use of restrictive choices, like: Likert scales, or a game theory approach. This would lend itself to participants being able to return responses quicker and so opens up the opportunity for more rounds and more questions. However, it is felt that this may not generate a comparable depth of knowledge as with the chosen qualitative approach and is heavily dependent on the researchers questions, which may be too restrictive. In response, one round could be used for panellists to vote on a selection of questions and to add their own. Although, this could prove to be more labour intensive and

problematic for doctoral study, as it would require sustaining further contributions from panellists through additional rounds, which poses problems of dependency.

2. **Delphi with one company and several employees**. This could be one organisation, ranging from: client/producer/service provider in one industry; or a brand/PR/advertising agency operating across sectors. It is likely that this would improve response rates and it would be interesting to see how views within the same organisation tally, when anonymised. However, it poses problems with generalizability concerning brands and culture in general – as opposed to branding and cultural practices in that organization.

3. **Delphi with postgraduate brand management students.** Data could be collected during courses delivered by the researcher. This way pedagogy could support Socratic methods and eliciting and generating a wider body of knowledge. Further advantages are that panellists can be exposed to researcher's background theory and response levels are likely to be higher. In addition, the sample size could be increased. The cultural advantages are that the researcher usually teaches cohorts with approximately 85 nationalities in a year. However, in using students, this could be at the sacrifice of practical and professional experience as brand managers, rather than just consumers and specialist junior researchers. Having considered this approach, a middle ground was adopted in the chosen method: by forming a sample using practitioners and academics.

4. **In depth interviews with publishers, academics and editors**. Here, a focus would be on why authors wrote what they did. For example, due to: gaps in literature, career progressions, and opportunities. Beyond this, processes of reflective academic discovery could be investigated. For example: what challenges did they face getting work to publication; how long did it take; why did they select the journal they did; when observing other's citations of their work, what are their views on resulting conclusions – for example has their work been interpreted in the way that they intended it to be understood?

5. **Covert participation methods and netnography.** The aim would be to take a naturalistic approach, removing the researcher from interactions with subjects, to minimise researcher influence. The researcher could gather data from online forums, corporate literature, trade journal articles and attending specialist conferences. The challenge with this approach however is whether there is sufficient relevant data, which can be collected.

Upon completion of the thesis, the researcher has considered undertaking further research: building on the full doctoral discoveries and using one of the suggested alternative approaches.

4.8 Conclusions

Chapter 4 outlined what can be broadly grouped according to the research design; data generation; and analysis and synthesis. Underpinning these, the following points were addressed:

- Philosophical perspective adopted
- Methodological underpinnings
- Rationale and justifications for such an approach
- Expertise of the researcher
- Appraisal of its suitability for doctoral studies
- Research instrument
- Method of data collection and analysis
- Limitations and alternatives

The data theory was designed to link closely with the previous standpoints and subsequent findings presented in the background and focal theory chapters. As the previous chapters had indicated that the subject field appears to follow cycles of progressive discovery and application, it was felt that data theory in turn should be designed in such a way that cycles of iterative induction and deduction were central to research. Where there appear to have been gaps in knowledge previously concerning the subject field, it has been argued that they can be attributed to overly rigid linear processes and restrictions, which have curtailed discovery and analysis – as have been discussed in Chapters 2, 3 and 4. Therefore, whilst the research process invariably follows a sequence, the structure was designed to elicit porous boundaries of cyclical discovery and reflexive testing; which was judged to be best suited to adopting a qualitative research approach.

Due to the complexity and dynamism of the identified phenomenon, a blended methodological approach was taken which draws from qualitative methods that drive inductive antipositivist approaches to analysing data. Whilst other methods were considered, the Delphi technique was the chosen research instrument, as it encourages problem-solving and knowledge building best suited to tackling real-world and phenomenological problems - where there exists gaps in knowledge and differences in opinion. The justification comes from the fact that through iterative processes of galvanising consensus from within a group of experts, agreement on issues surrounding gaps, with in-depth coherent meaning can be achieved more easily. The rationale being that many minds are better than one

(the researcher) during the preliminary problem solving stage. Furthermore, by using experts, the data collected is likely to be of a level and format suited to in-depth study. In addition, the researcher acknowledges that by including academic and practitioner experts as an integral part of the research problem, there is a likelihood of achieving a greater level and chance of addressing the identified research problem. How judgements were arrived at was considered; and how the most valuable tacit and perishable knowledge can be 'borne', preserved and honed into an emergent and generative theory was the key aim. To this end, Grounded Theory, in connection with its varying and subsequent refinements and adaptations have been considered. The backdrop to this philosophical standpoint and method of researching saw the researcher drawing heavily from the ancient Greek philosophical schools of thought. This anchored the researcher in traditional scholarship methods; linked the focal theory to the data theory; and also, empowered him to tackle real-world modern day phenomenon.

Chapter Five: Consensus and Biographical data – results and findings

Calculating the validity and generalizability of the data collected, according to quantified: subject-held consensus and participants' biographical data

Chapter 5: Consensus and biographical data analysis

5.1 Introduction

This chapter presents and analyses data used to confirm consensus and hence termination of the Delphi study. In this chapter, what has been expressed in terms of opinions in response to the main research questions is not important. Rather, the focus is on whether participants *agree that they agree,* and ratifying this fact. Following this, data and findings from the biographical data are presented and analysed together. One reason is because consensus and biographical data are both quantitative and qualitative in nature; whereas the Delphi study data is solely qualitative. Furthermore, grounded theory methods encourage the treatment of data in a manner where analysis and findings are linked to the data source. Based upon these statements and because the Delphi study is the main focus of the research, it has been given a separate chapter. The decision to present biographical data, which links to the validity and generalizability of responses, after that which shows consensus, was taken for the following reasons:

- Whilst biographical data was collected first and used to establish the validity of the chosen sample and potential for generalisation of findings, it was then used to analyse the content of the responses, in addition to generalisation of findings. And so the richness in the biographical data collected was held to be of most value when analysing responses to the main research themes
- Generalisation of findings is judged according to:
  - o Being representative of the views of the panel
  - o Their relationship with background and focal theory
- Therefore, biographical data is held to be the link between consensus and opinions expressed by the Delphi panellists
- To this end, its presentation makes more sense in this order
  - o Because arriving at consensus signals the end of data collection
  - o Much of the biographical data links more closely with the panellists' responses

Chapter 6 will then present and analyse the data gathered from the Delphi rounds, in response to the main research questions.

5.2 Evaluating consensus in the Expert Delphi Study

The following section presents how consensus in the Expert Delphi study was judged to have been reached.

Data analysis in this section gives preference to literature reviews undertaken by Hsu and Sanford (2007), when evaluating Delphi study data analysis methods; and is then supported by wider reading. One of the reasons being that Hsu and Sanford's (2007) work considers approaches used in several doctoral theses: (Eckman, 1983; Ludwig, 1994; and Jacobs, 1996).

Whilst subject to interpretation, Miller (2006) [cited in: Hsu and Sanford, 2007], argues that consensus in a Delphi study can be decided when a certain percentage of the votes fall within a prescribed range. Ulschak (1983) suggests that this is when 80 per cent of subject's votes fall within two categories on a seven point scale. Whilst Green (1982) [cited in: Hsu and Sanford, 2007], recommends at least 70 per cent need to rate three or higher on a four-point Likert-type scale, with the median being 3.25 or higher. However, Skutsch and Schofer (1975) advocate an alternative measure of the stability of subjects' responses in successive iterations as being more reliable.

Green's (1982) choice to use a 'forced choice' four point method has been considered, in preference to more conventional Likert models, which advocate using odd number point scales, allowing for a neutral position. It is argued that there are merits and drawbacks in both. A four-point scale could offer a clearer indication of disagreement, however it could equally push higher levels of agreement. Five point scales may deliver lower and more 'accurate' mean scores, due to the inclusion of a neutral option. However, neutral scores may be seen as an easy option and therefore it is questionable whether they represent an actual opinion. Armstrong (1987) finds that when comparing four and five-point scales, the comparative overall differences in responses is negligible. Having considered these arguments, the researcher was in favour of a consensus derived from a five-point forced choice scale. However, this five-point scale allows for the collection of a wider spread of opinions. As subjects are being asked to vote on their own collective data, and there is provision to amend and challenge existing opinions,

it could be agued that there appears to be little need to drive a forced choice. Nevertheless, the key purpose of gathering votes was to ascertain whether sufficient consensus had been reached – and so it was decided that there was no need for a neutral position.

Instead, a five-point instrument was created, with weightings in favour of evaluating types of agreement. This meant that whilst the scale was bipolar, it was asymmetric. In support of using asymmetric scales, Yalcin and Amemiya (2001) advocate the use of nonlinear factor analysis in the applied sciences and that they can be formulated to carry out useful statistical methods, as linear models can be unrealistic. Waller et al (1996) suggest that nonlinear response models are well suited when investigating emotionality scales, where linear scales can produce misleading results. Furthermore, as the key focus of this Delphi study was to encourage respondents to voice their opinions, and in this instance, more importantly their disagreements: there was an additional comment box, for gathering further qualitative data.

Therefore, as a refinement of Green's (1982) position, the researcher deemed one of the methods for judging when consensus had been reached, was subject to at least 70 per cent of subjects rating 3.5 or higher on a five point Likert-type scale [equivalent to 70%]. When linked with Ulschak's (1983) position of judging consensus, these were held to offer statistical significance.

Collectively, these point towards consensus not having to be agreed by all - rather, a significant portion of the sample. For getting a panel to agree on every point, line and word of the data in a Delphi study response document is unlikely, when it approximated 6,500 words. Furthermore, in the interests of assessing how opinions have been moulded, within the 'spirit' of the Delphi method and its strengths, rather than due to distortions and negative factors, care should be taken to evaluate the progression towards consensus. Assuming that the questions have been interpreted by all in the same way, and as the sample consists of a panel of experts: it is unlikely that there will be large swings in opinion – instead it is more likely to be the case that splits in opinion remain, but there is an incremental shift.

The data collected in this Delphi study was largely qualitative and based upon open-ended questions, in the interests of optimising volume of data collected and potential for data which necessitates iterations. However, in subsequent rounds, once approaching stability of responses in iterations, consensus, and data saturation was judged to be close: the decision was taken to use a quantitative approach to judging consensus – through registering votes. This was in the interests of providing more concrete proof, and evaluations as to: what degree, strength and distribution of consensus was present.

As stated, a five point Likert-type scale was employed. However, due to the qualitative nature and volume of the data collected, the decision was taken to offer a higher degree of choice [Figure 21]. Furthermore, in offering percentage scales, rather than five scores, it is argued that this safeguards against unintended skewness, kurtosis and up scaling. The cue was taken from scoring methods used in postgraduate university degree mark schemes. In postgraduate mark schemes, failure, which is held to be analogous with disagreement in this questionnaire, is indicated generally by grouping into two categories: marginal and clear fail. When considering a pass (analogous to agreement) three categories are considered: pass (50-59% - average, acceptable performance); merit (60-69% - above average, commendable); and distinction (70%plus - excellent, highly commended, exceptional). However, for this questionnaire, categories indicating strong agreement were moved up the scale, in line with recommended higher median scores.

Now, having read the above section, Please take the time to fill out ONE of the following, below:		
Percentage	**Guidance on scoring**	**Percentage Awarded** (Add one numerical value, in one of the cells)
0-29%	**Largely disagree** with the points made by the panel	**%**
30-49%	**Partially agree** with the major and minor points made by the panel	**%**
50-69%	**Largely agree** with all of the major points and the majority of minor points made by the panel	**%**
70-79%	**Strongly agree** with all of the major points and the majority of minor points made by the panel	**%**
80-100%	**Strongly agree** with all of the major and minor points made by the panel	**%**
Additional Comments, views and points to be raised and included in this section (if any)		

Figure 21 Expert Delphi vote questionnaire

Participants were asked to register three votes, using the same scale for each, on the three themes:

1. Brands and branding
2. Brand management
3. The relationship between brand and culture

Hasson, Keeney and McKenna (2000) and Hsu and Sanford (2007) report that the major statistics employed in Delphi studies are measures of central tendency (mean, median, and mode) and the level of dispersion (standard deviation).

Murray and Jarman (1987) suggest that the mean is sufficient, whilst others recommend that a mean should be based on a Likert-type scale (Hill and Fowles, 1975; Eckman, 1883; and Jacobs, 1996). Ludwig (1994) considers the importance of a mode value, as means or medians could be misleading in instances where there is clustering around two or more points.

5.2.1 Results

The Expert Delphi panel eventually consisted of 24 subjects, each of whom agreed to participate and return biographical data. 23 of the 24 subjects returned votes. Notably, only subject 23 returned scores that were below 50%. Mean, median and mode scores were calculated based upon 23 subjects. Standard deviations were calculated for subjects 1-22 and 1-23 (subject 23 who scored below 50%) [Table 10].

In considering these points, iterations and the votes recorded in this Delphi study indicated:

1. Prior stability of subject responses, in line with Skutsch and Schofer's (1975) observations
2. Above 80 per cent of subject's votes within two categories (Ulschak, 1983)
3. At least 70 per cent of subjects' votes rating the equivalent to three or higher on a five point Likert-type scale, with the median being 3.5 or higher (Green, 1982).

When calculating point 3, votes below the median value were examined, using standard deviations - as those above were already representative of strong agreement.

Statistical calculations of votes	Theme 1 Brands & Branding	Theme 2 Brand Management	Theme 3 Brands & Culture
Mean	**79%**	**77%**	**78%**
Maximum score	100%	90%	95%
Minimum score	15%	40%	40%
Median	**76%**	**75%**	**75%**
Mode	**75%**	**90%**	**75%**
Standard Deviation **Subjects 1-22** =STDEV.S(1:22)	9.77	11.31	10.94
Standard Deviation **Subjects 1-23** =STDEV.S(1:22)	16.04	13.13	12.96

Table 10 Delphi study votes on consensus
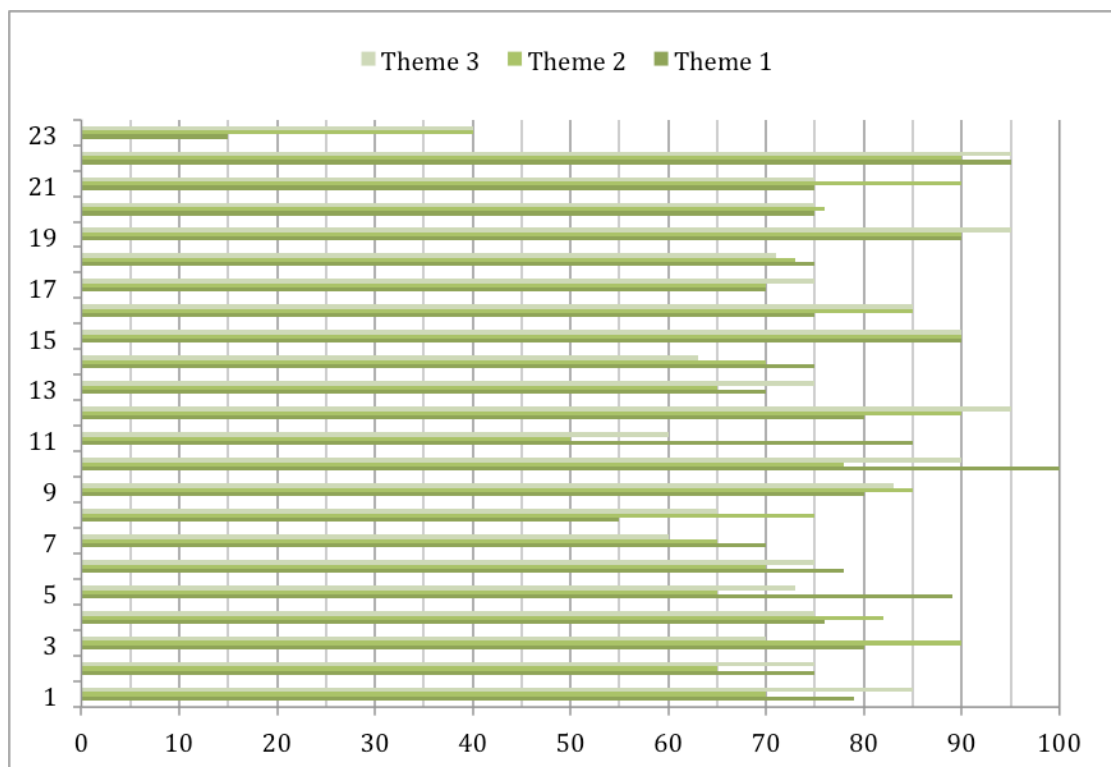
Figure 22 Chart of panellists' votes

x-axis: Percentage scores

y-axis: Respondents

The nature of the disagreements represented by low vote scores, were substantiated by comments in the qualitative comments box. Particularly those comments by Subject 23 indicating disagreement will be discussed in Chapter 6. Some of those subjects that returned high vote scores, agreeing with the collective Delphi responses, also chose to make comments. These ranged from further supportive comments, to additional information supporting the existing points made. Again, these will be discussed in more detail in the next section.

Based upon the above statistical findings, consensus was judged to have been reached. Having established this, the next sections will analyse the biographical data and Delphi study responses.

5.3 Examining subjects' biographical data

The following section presents and analyses the biographical data collected from the Delphi participants. Prior to the data being collected, participants had to satisfy three criteria:

1. Appraisal by the researcher of an individuals' potential, using participant observation methods and memoing
2. Possession of a degree-level qualification, as a minimum
3. Willingness of individuals, in principle, to participate in the Delphi study – established through several informal discussions by email

24 individuals submitted biographical data, by email, in the form of open-ended responses to a Word document questionnaire. This signalled their formal acceptance to participate in the Delphi study. Shortly afterwards, Delphi questions were emailed, as a separate Word document.

As mentioned previously, 23 of the 24 panellists submitted responses to the Delphi questions. It is perhaps telling that the only participant who did not return responses to the Delphi questionnaire was also the only participant whom the researcher had not met face-to-face. Subject 24 was a colleague known to two other active participants of the study, who chose to recommend the subject. It was also unfortunate that this subject expressed work pressures and illness as being factors impeding their participation. However, the researcher still reflects upon whether these may have been overcome, had he had the opportunity to

meet face-to-face - in order to forge stronger psychological contract bonds. In the case of the other 23 participants, the researcher met each of them in one or two forms of professional settings:

1. Marketing conferences
2. Professional marketing training settings

In both of these environments, the researcher and potential panellists were able to see each other present, discuss and share their views, first hand. These provided the basis for the researcher approaching them with the proposition of being involved in a Delphi study.

As Delphi study was governed by consensus through collective views and judgement: the decision was taken not to analyse individuals independent of each other - rather collective experience and biographical data was held to be of more significance. Furthermore, Delphi panellists were notified of the rationale behind collecting biographical data and its subsequent treatment, which was communicated as follows:

> *The purpose of the questions is for the researcher to establish what background and experiences are present within the expert panel - both collectively and as individuals. This is for three reasons:*
>
> 1. *To map out the chosen sample group of experts*
> 2. *To help support and justify the rationale behind the research approach taken*
> 3. *To assist with analysing the views that will be offered in the forthcoming Delphi study*
>
> *It is understood that some of the data provided is sensitive in nature. Therefore, within the write-up and presentation of the results:*
>
> - *Names of participants will be excluded*
> - *Company names and brands will be separated from individual participants*
> - *Participants will be analysed as a collective body.*
>
> *This is in the interests of preserving the anonymity of participants - which is designed to enable and encourage the expression of views freely; and to avoid the need to gain clearance from current and previous employers.*

Having collected the biographical data, it was grouped as follows [Figure 23]
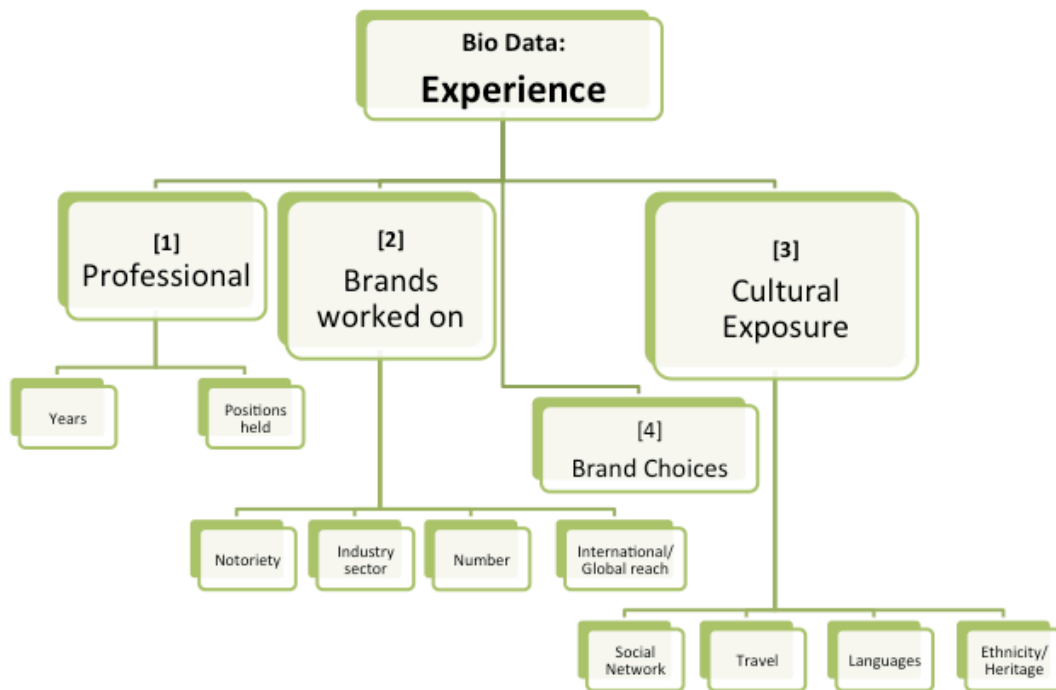
Figure 23 Delphi participants' biographical data grouping map.

The first objective for collecting and analysing the biographical data was to establish the suitability and appropriateness of the collective panel, as body of experts. From this, the potential for data saturation and generalizability was considered. Having established this, the further objective of the data was to provide a cultural source: drawing from business and management; socio-anthropological; and consumption-based cultural frameworks. In addition, a key component and advantage of requesting biographical data was to:

- Orientate participants towards the contextual underpinnings, methodological approach, and style and of the researcher – and that manifest in the Delphi study
- Prime and 'warm-up' participants towards considering
    o Brands
    o Professional expertise
    o Personal consumerism
    o Multi-dimensional and international/global approach to culture
    o Wide-based ethnographic and reflective view on these subject areas.

To this end, the overarching objective of collecting biographical data was to capture and record *experience*. From this the researcher and panellists were

guided towards sharing and capturing *experiences,* driven by experience and expertise [Figure 24]
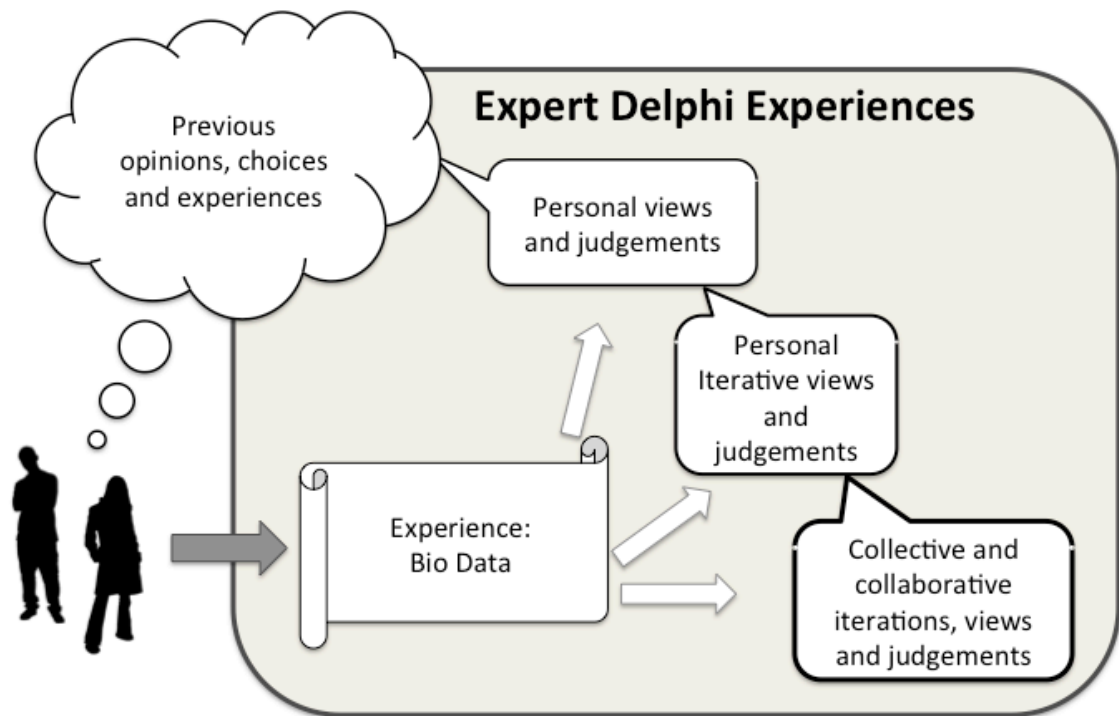
Figure 24 The Delphi experience/experiences continuum

5.3.1 Academic achievements and years of experience

Following discussions and findings from the pilot study, as presented in the methodology section; the researcher was of the opinion that due to the subject matter, level and nature of the participation within this Delphi study: that these required a high ability of being able to think and articulate conceptual matters critically and in depth. Therefore it was judged that such a study necessitated that participants were educated to degree level. This judgement was based upon a review of degree learning outcomes and objectives, provided in benchmarks and frameworks by the Quality Assurance Agency for Higher Education (QAA). In line with this thinking, all participants were confirmed as being educated to at least degree level. Furthermore, over one half of participants held a master's degree and one quarter held doctorates. Collectively, this meant that over 80% of panellists were educated to postgraduate level [Table 11]

Qualification	Number of Panellists
Degree	24
Masters	14
Doctorate	6

Table 11 Delphi panellists' academic achievements

As will be examined in more detail, when presenting Delphi study responses, this decision was held to be conducive when producing rich, structured and critically balanced data.

As a starting point, when reviewing years of experience: independently, on average and collectively, the majority of panellists were seen to be in possession of extensive relevant exposure to professional practice [Table 12]

	Number of Years
Total Professional Experience of Delphi panel	367
Mean	15.29
Maximum	38
Minimum	2
Median	11
Mode	7

Table 12 Years of experience held by Delphi panellists

As can be seen from the value indicating minimum years of professional experience: being in possession of a degree was held to be both a separate and supporting indicator of professional expertise, in the Delphi study context. Separate, because the researcher considered whether length of professional experience may in fact mean that subjects had been graduates for such time that being asked to respond to the more 'academic' questions may pose problems, with subjects being 'out of practice', or ignorant to recent academic literature of relevance. Furthermore, those selected with relatively little work experience,

were chosen because of their specialism in marketing at degree level. Therefore it was felt that they may be accustomed to answering questions on branding, and will have had prior exposure to more recent academic business thinking concerning brands. Having stated the potential limitations, further support of the Delphi iterations allows panellists to absorb, reflect, learn and present opinions in a collective style that embraced both academic and practitioner erudition.

When further examining academic and practitioner expertise through documented job titles held to date [Table 13], several observations were made:

- Subjects demonstrated professional expertise and excellence through career progression and number of job titles held
- Over 87% of subjects had first-hand management experience. For those that did not, it was judged that they would be able to project opinions concerning management - through academic study and experience of being managed. Furthermore, those that had been managers would comparably be able to reflect upon their experiences of being managed
- Management responsibilities and seniority are indicative of an ability to agenda-set and lead – which are valuable attributes when looking to unearth emergent thinking
- In addition to being practitioners, a core contingent were found to be academics, lecturers and trainers. None of the academics, lecturers and trainers within the study had spent their entire careers exclusively. Rather, they had also spent time working in industry – and so were well placed in being able to articulate academic and practitioner perspectives
- Consultants, freelance journalists, editors and senior academics were judged to be able to write comfortably in a longhand style, which is encouraged and essential when conducting in-depth small sample qualitative studies. Furthermore, as independent advisors and experts, they have experience of disassociation and professional impartiality, when considering the practices of other brands and organisations.

Job Title	Number of Panellists
Assistant, Secretary	4
Executive, Account Handler, Publicist	17
Researcher, Analyst	6
Lecturer, Trainer	8
Consultant	12
Freelance Journalist, Editor	3
Senior Academic	5
Manager	21
Director	9
Head	9

Table 13 Job titles held by Delphi panellists

5.3.2 Gender

Gender	Number
Male	15
Female	9

Table 14 Gender of panellists

Examining gender differences was not a focus of the study. However, in the interests of upholding ideas of sexual equality, attempts were made to gather a panel of males and females. Furthermore, opinions concerning brands, management and culture were considered not to be subject to gender. However, it is conceded that had questions concerning gender in the Delphi study been included, particularly concerning management, it would be likely that differences would start to appear. This is due to extensive empirical data that exists, which reports of 'glass ceilings' affecting females in the workplace. And because of this, it was possible that females may have chosen to make references to gender specific issues. Similarly, 'glass ceiling' is a term that acknowledges the barriers faced by other minority groups, according to: religion, race, sexuality, and disability. Comparably though, no such issues specific to discrimination were

voiced, in the Delphi responses. It is judged therefore that due to the framing of the questions and the environment created: panellists understood culture, cultural attributes, and cultural experiences to be positive traits and something that should be celebrated.

5.3.3 Exposure to international travel

As the research study considers the role of culture and the differences in norms, values and practices, which have led to gaps in understanding, varying approaches and relative culturally-based brand successes and failures: it is argued that panellists should have sufficient multi and cross-cultural experiences to draw from. To this end, it is judged that first-hand travel experiences are one indicator. Figure 25 and Table 15 highlight that collectively, the Delphi panel have travelled extensively for work purposes and a significant number have lived in different countries. It is also clear that panellists understood both questions to be asking different things, based upon the differences in values recorded.

Delphi participants' biographical data: Countries worked and lived in

	Africa	Americas (Caribbean, Central, South)	Americas (North)	West Asia	Central Asia	South/South East Asia	East Asia	West/North/South Europe	East Europe	Oceania
Countries lived in	3	2	5	9		11	6	34		1
Countries worked in	6	20	7	7		12	9	53	4	3
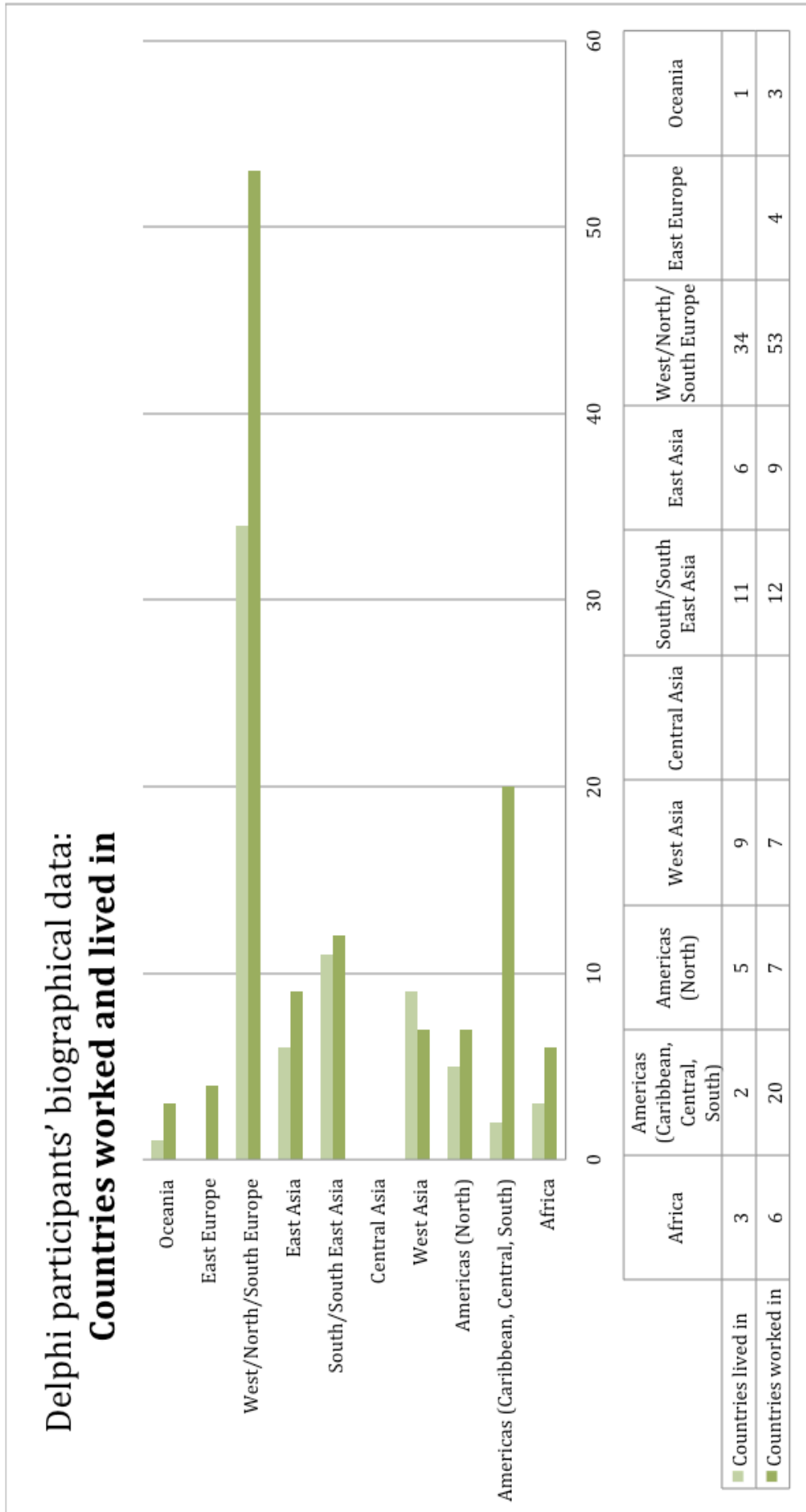
Figure 25 Delphi participants - countries lived and worked in

	Africa	Americas		Asia				Europe		Oceania
		Caribbean Central South	North America	West	Central	South South East	East	West North South	East	
Countries worked in	Africa Algeria Egypt (2) South Africa Sudan	Argentina (3) Bahamas (2) Barbados Brazil (2) Chile Cuba Curacao Falklands Jamaica (2) Mexico Peru Puerto Rico Tobago Trinidad Venezuela	North-America Bermuda Canada (2) USA (3)	Dubai (2) Israel Jordan (2) UAE (2)		India (6) Indonesia Malaysia Singapore (3) Thailand	Far East China Hong Kong (3) Japan (3) South Korea	Western-Europe Austria Brussels Czech Republic Denmark France (5) Germany (4) Greece Hungary Ireland Italy Netherlands (2) Norway Poland (2) Portugal (2) Scotland Serbia Spain Slovenia Sweden (2) Switzerland UK (20) Yugoslavia	Eastern-Europe Bulgaria Russia	Australia (3)
Countries lived in	Egypt (2) Sudan	Argentina Peru	North America USA (4)	Dubai (2) Iraq Israel Jordan (2) Kuwait Lebanon Saudi Arabia		India (7) Indonesia (2) Malaysia Singapore	China Hong Kong (3) Japan South Korea	Belgium (2) Czech Republic Denmark France (3) Germany (2) Hungary Italy Portugal Scotland Spain (2) UK (19)		Australia

Table 15 Delphi participants - countries lived and worked in

From the data it is apparent that not all territories are represented, however these short fallings have been considered and answered as follows:

- There is strong representation in the emerging markets, in South America, Africa, Asia – which literature within background theory indicated that there are gaps in understanding and a paucity of academic literature available
- *Interbrand* (2011) 'Best 100 Global Brands 2011, and *Brand Keys* (2011) ' Top 100 Customer Loyalty Leaders 2011", point towards all of these brands hailing from North America; West, North and South Europe; and Asia. In further support, *Brand Finance* (2011) awards only two brands (from Brazil) in the top 100 of their 'Global Finance Top 500' rankings – with the rest comparable to *Interbrand* and *Brand Keys* being from North America; West, North and South Europe; and Asia
- 'The West', in North America; and West, North and South Europe are strongly represented by the panel
- Delphi participants should still be able to reflect upon factors similar and unique within the underrepresented territories - as experts and those who have travelled extensively.

5.3.4 Ethnic background, affiliations and languages spoken

Building on the cultural arguments presented being connected with exposure and experiences, further culturally grounded and specific data was collected. The three most significant factors, in addition to travel, were held to be:

- Ethnic background and heritage
- Social affiliations liked with ethnicity and nationality
- Language proficiency, beyond English

[Presented in Figure 26 and Table 16]

As the Delphi study relies on consensus and the preservation of *in vivo* responses, all participants and the researcher had to be able to speak at least one language. As has been stated, English was the chosen lingua franca. In addition to the importance and merits of the cultural data collected in this study, new contributions to knowledge, demonstrated in this research approach, are as follows:

- Most academic literature has been observed to classify and present participants either according to marketer, or consumer statues – and rarely both. Here personal non-worked related and practitioner

experiences have been collected, as they are judged to be strongly linked and potentially able to unearth further erudition

- Most cross-cultural business and management studies within the field group participants according to nationality, or ethnicity. Furthermore, there appears to be an absence of studies, which embrace hyphenated identities, which more accurately reflect cultural heritage and its influence on individuals. This is further compounded by the fact that globalisation, travel, migrancy, increased inter/multi-racial childbirth and consumption are observed to increase the significance of increasingly complicated hyphenated identities. Such multi/inter-racial ethnicity was present in the panellists' responses

- Beyond personally held ethnic and national heritage, social affiliations were held also to affect the mind-set and practices of individuals. This is especially as the preservation and assertion of a social affiliation indicates an interest and influence on individuals

- By allowing participants to define their own ethno-cultural identities, they are free to express themselves more fully, accurately, and without potential bias and influence through category coercion

- Multi-linguism is held to offer an indicator of potentially different cultural perspectives, resulting from rooted socio-linguistic factors and nuances. In addition, they equip individuals with the ability to understand cross-cultural issues in more detail. Furthermore, they may draw individuals away from premises of ethnicity and nationality yielding homogeneity, due to their commitment to an 'other' cultural-linguistic identity

- Collectively, they champion the argument for and necessity of qualitative research in the applied sciences.

Delphi participants' biographical data:
Ethnic Background, Affiliations & Languages Spoken

	Africa	Americas (Caribbean, Central, South)	Americas (North)	West Asia	Central Asia	South/ South East Asia	East Asia	West/ North/ South Europe	East Europe	Oceania
Languages Spoken (Excluding English)	3	2	1	5		11	5	25		
Other Ethnic Affiliations	4	3	9	5		20	7	22	3	4
Ethnic Background & Cultural Heritage	2		2	12		13	5	37	1	1

Figure 26 Delphi participants - Ethnic background, affiliations and languages

	Africa	Americas		Asia				Europe		Oceania
		Caribbean Central South	North America	West	Central	South South East	East	West North South	East	
Ethnic Background & Cultural Heritage	Arab Egyptian		US American (2)	Arab Middle Eastern Armenian Emirati Iraqi Israeli (2) Jordanian Kuwaiti Palestinian Saudi-Arabian (2)		Bengali Burmese Indian (6) Iranian Malaysian (2) Singaporean South-Indian	Oriental Chinese (2) Hong Kong (2) Japanese	White (5) Belgian (2) British (10) Danish English (10) French (2) German (2) Irish (2) Italian Maltese Scottish	Russian	New Zealand
Other Ethnic Affiliations	African (2) Mauritian South-African	South American Columbian Mexican	White African-American Canadian USA (7)	Jewish Middle Eastern (2) Iraqi Palestinian		Burmese Filipino Indian (6) Indonesia Malaysian (7) Singapore (2) South-Indian (2)	Chinese Hong Kong Japanese (4) Korean	White Europe (3) Danish English (4) French (2) German (4) Irish (2) Italian Scottish Spanish UK (3)	Jewish Russian Slovakian	Australian (4)
Languages Spoken [English +]	[Arabic, French, Portuguese]	[English, Portuguese, Spanish]	[English, French]	Arabic (4) Hebrew		Bengali (2) Burmese Hindi (3) Indonesian Malay Malayalam Tamil Urdu	Cantonese Foochow Japanese Mandarin (2)	Danish English (24) French (11) German (5) Italian Norwegian Portuguese Spanish (4) Swedish		[English]

Table 16 Delphi participants - Ethnic background, affiliations and languages

As has been considered in the previous section, it appeared that participants had no direct interaction with Central Asia. Whilst Figure 26 omits English language in the data values, it is included in Table 16 – as in indication of its significant usage across continents.

When comparing values of travel against ethnic heritage and social affiliations, there appear to be differences. Drops in ethnicity and social affiliations in West, North and South Europe, and the Caribbean, Central and South America indicate that panellists exhibit economic migrancy to these regions; and in tandem that many of these individuals feel that they cannot claim ethnic and cultural heritage from these regions [Table 17].

	Africa	Americas (Caribbean, Central, South)	Americas (North)	West Asia	Central Asia	South/South East Asia	East Asia	West/North/ South Europe	East Europe	Oceania
Countries lived in	3	2	5	9		11	6	34		1
Countries worked in	6	20	7	7		12	9	53	4	3

	Africa	Americas (Caribbean, Central, South)	Americas (North)	West Asia	Central Asia	South/ South East Asia	East Asia	West/ North/ South Europe	East Europe	Oceania
Languages Spoken (Excluding English)	3	2	1	5		11	5	25		
Other Ethnic Affiliations	4	3	9	5		20	7	22	3	4
Ethnic Background & Cultural Heritage	2		2	12		13	5	37	1	1

Table 17 Summary values of Figures 25 & 26

A large portion of panellists shares South/South East Asian ethnic heritage and/or social affiliations. However, even when considering the collective travel experiences of all panellists, and therefore not omitting their data, not all South/South East Asians have worked in Asia. This finding it is argued raises questions of research that examines ethnicity, or nationality, or country of residence at the time of data collection. Because it is questionable whether such data is rich enough to still yield sufficiently homogenous and generalizable findings.

Another key observation is that living and/or working in a country does not necessarily lead to the creation of social ethnic affiliations. This is perhaps because the personally held threshold of participants is much greater before they feel comfortable claiming a social bond. In contrast, it could be argued that despite extensive international travel, panellists only hold a finite number of

ethnic social affiliations, which they judge to be significant, or enter their value systems.

It is argued that these collective observations lend further argument to data collection across several factors. Furthermore, it is acknowledged that in the presence of such rich data, more time could have been spent further analysing it. However, the focus of the study remained on the opinions of the panellists, reflected in their responses within the main Delphi study questions. The following section considers experience according to panellists' brand interactions.

5.3.5 Brand interactions

Whilst searches suggest that there are several ways of classifying industry sectors, the researcher decided upon the framework presented by Warc (2011). *Warc* (previously known as the *World Advertising Research Centre*) assert that they are the most comprehensive marketing information service in the world; and that their service is used by global marketing, advertising, media, research and academic communities. To this end, their categorisation was considered to be appropriate for this research. However, this was not to say that it is without drawbacks. Categorisations in general, those presented by other organisations and Warc's in particular face challenges. Modern commerce is increasingly being influenced by online and brand-extension strategies. Furthermore, in this study it is the brand, rather than the commodity (product/service) that is being examined. Therefore, with the effects of online, brand extensions and brand unifying concepts across industries and product/service lines: these are likely to encourage the blurring of lines, which makes discrete classification problematic. Likewise, within Warc's sub-categorisations the complexity of modern markets is evident. For example, supermarkets, technology, online retail, C2C. Peer-to-peer, and user generated content, pose challenges of categorisation under one heading. Furthermore, education and academic institutions, as government and non-profit organisations is also problematic – as there are private institutions and those figures are observed to be on the increase. Nevertheless, for the purposes of validating experience and expertise in this part of the study, Warc's form of

classification was sufficient, giving a bird's eye view. In addition, when examining the name of the brands provided by panellists, brand notoriety and international/global reach were also evaluated.

The Delphi panel returned a figure collectively of 185 brands, which they worked, or had worked on [Figure 27]. Of those brands, some participants had worked on the same brands and these numbers were indicated in brackets in Table 18 (across pp.199-205).
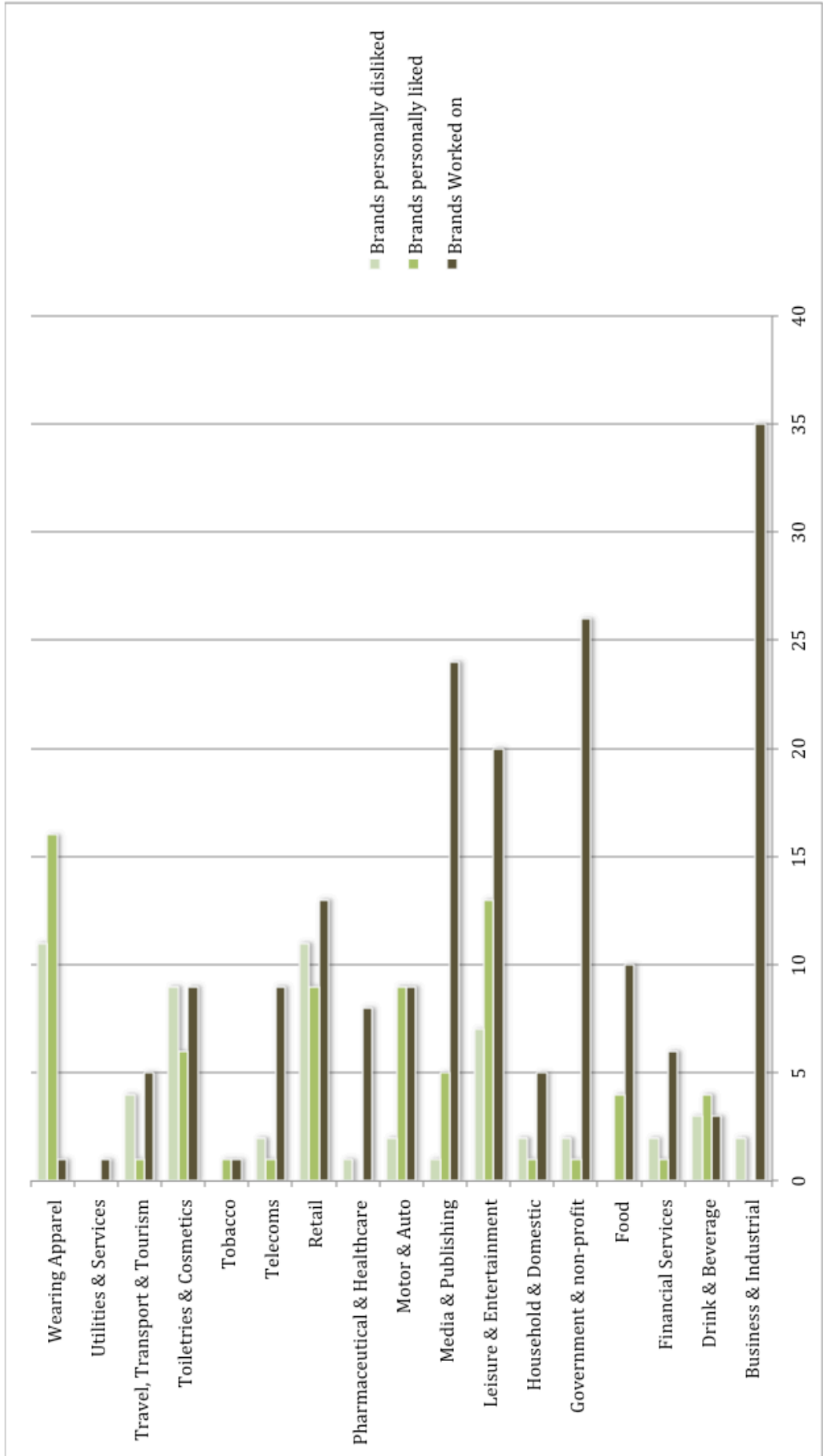
Figure 27 Delphi panellists' brand experiences, according to industry sector

Table 18 Delphi panellists' brand experiences, according to industry sector

Sector	Descriptors	Brands worked on	Personal brand *liked*	Personal brand *disliked*
Business and industrial	• Business-to-business • Employment, recruitment, staff • Industrial • Information technology, high-tech • Legal and professional services • Property and construction	Bearing Point; Bowmer & Kirkland; Brand Keys; Cato-Johnson Y&R; Cedar Communications; Danfoss; Dentsu; Frontline Media; Grundfos; Grant Thornton; IIR Middle East; Informa Yatch Group; JF-Stoll; JWT Group; Kanri Kogaku Laboratory; Kirloskar; Komine Agency Ltd; KPMG; Leo Burnett; Liquorice Group; Lowe + Partners Worldwide; Madison Bell; Mediareach Advertising; Merchant Investors; Monsanto; Naked Communications; Ogilvy Group (2); Mudra Communications; Rise Communications; Saatchi & Saatchi; Saffery Champness; Skadden, Arps, Slate, Meagher & Flom; Skyhawk; Wieden + Kennedy; Wm. Esty. [35 brands]		*anti-Chinese* (2); Reliance (India) [2 brands]
Drink and beverage	• Beers, lagers, stouts, cider • Coffee and tea • Drink industry, market • Non-alcoholic, soft drinks • Pre-mixed sprits, alcopops • Spirits, liqueurs • Wines	Coca Cola; Nescafe; Nestle. [3 brands]	Absolut Vodka; Boh Tea; Coca Cola; Innocent [4 brands]	Carling; Coca Cola; Innocent; WKD [3 brands]
Financial services	• Banks, credit cards, loans • Building societies • Financial services (general) • Insurance • Investment	Britannia; Citibank; Hartford Insurance; HSBC; NatWest; Royal Bank of Scotland (2). [6 brands]	HSBC [1 brand]	Citibank; HSBC [2 brands]

Sector	Descriptors	Brands worked on	Personal brand *liked*	Personal brand *disliked*
Food	• Baby food • Bread, cake, biscuits • Breakfast cereals • Confectionary • Convenience, readymade • Dairy products, ice cream • Fast food, takeaway outlets • Food industry, market • Fruit and vegetables • Meat, poultry, fish • Sauces, seasonings, condiments • Savoury snacks, potato chips	Cadbury Bournvita; East End; Hellmans; Kettle Chips (2); Kraft; Pearl; Pride; Natco Foods; Nestle; TRS. [10 brands]	Marmite (3); M&S; Simply Organic; Twix [4 brands]	
Government and non-profit	• Charities and voluntary organisations • Educational, universities • Government, social policy • Political organisations • Public Health • The Services (army, police etc)	Aston University; British Council; British Institute of E-Commerce; British Heart Foundation; Global Road Safety Partnership GRSP (FIA Foundation); Institute of Management Technology IMT Ghaziabad; Islamic Relief; Jobcentreplus; London School of Commerce; National Health Service; National Trust; Newport University; NSPCC; Middlesex University; Regent's College London; Royal Air Force; Royal Navy; UK India British Council; University of Greenwich; University of London; University of Southern Denmark; University of Wales; US Army; US military explosives; V Charity. [26 brands]	Hackney Council [1 brand]	*anti-Chinese* (2); *anti-Japanese* [2 brands]

Sector	Descriptors	Brands worked on	Personal brand *liked*	Personal brand *disliked*
Household and domestic	• Batteries, stationary, sundries • Cleaners, detergents • Furnishings and fittings • Gardening, horticultural • Household appliances, durables • Paints, DIY, home improvement • Pets and petcare • Toilet paper, kitchen towel • Washing powder, fabric softeners	Cif detergent; Domestos; Lifebouy; Persil; Unilever (2). [5 brands]	BPL India [1 brand]	*anti-Chinese* (2); Videocon [2 brands]
Leisure and entertainment	• Cameras, photography • Film, video and performance arts • Gaming consoles, computer games • Hi-Fi, A/V, music players • Lotteries, casinos, gambling • Museums, attractions • PCs, computing high-tech • Restaurants • Sports • Toys, games	40,000 Dawn of War; Canon; Clarence House; Deus Ex; Final Fantasy; InMe; Kingdom Hearts; Mattel; Minolta; Panasonic; Saints Row; SanDisk; Square-Enix; Sony; Sophie Ellis Bextor; S.T.A.L.K.E.R.; THQ; Tomb Raider; Warhammer; Worms. [20 brands]	*Heavy metal music;* 2Pac; Apple (6); Disney; Everyman Cinemas; Fascination Records; IBM; Manchester United; RockstarGames; Sony (2); Yamaha [13 brands]	*anti-Chinese* (2); Apple; Big Brother; iPad; iPhone; LG; London 2012 (2) [7 brands]

Sector	Descriptors	Brands worked on	Personal brand liked	Personal brand disliked
Media and publishing	• Directories • Magazines, periodicals, books • Newspapers • Radio stations, services • TV channels, services, programmes • Websites, online services, apps	BBC (3); BBC1 (2); BBC2; BBC3; BBC4; BBC Drama; BBC Radio 3; BBC Radio 5 Live; Dragon's Den (2); Eastenders; Eikoku News Digest; Friday Night with Jonathan Ross; Hollensen ApS; Nevermind the Buzzcocks; LoveFilm.com; Mock the Week; Over the Rainbow; Pearson; Redland; Russell Howard's Good News; So You Think You Can Dance; Strictly Come Dancing; The Apprentice UK; Top Gear. [24 brands]	Batman; BBC1; Big Valley; Dave; Lone Ranger [5 brands]	Absolute Radio [1 brand]
Motor and auto	• Auto industry, market • Automakers and marques • Compact, small family cars • Executive, luxury, prestige cars • Mid-size, large family cars • Motorcycles, bikes • MPVs, minivans • Supermini, subcompact cars • SUVs, 4x4s • Tyres, fuel, accessories, services • Vans, RVs	Aston Martin; Bajaj Auto; Honda (2); Hyundi; Jaguar; Jeep; Land Rover; Shell; Toyota. [9 brands]	Aston Martin; BMW; Dunlop; Harley Davidson; Landrover; Porsche; Tata; Volkswagen; Yamaha [9 brands]	SEAT; Shell [2 brands]
Pharmaceutical and healthcare	• DTC prescription products • Healthcare services, providers • Non-prescription, OTC products • Promotions to the medical profession	Arimidex; AstraZeneca; Diprivan; ICI; Inderal; Tenormin; Zeneca; Zestril. [8 brands]		*anti-Chinese* [1 brand]

Sector	Descriptors	Brands worked on	Personal brand liked	Personal brand disliked
Retail	• Category management • Clothing and fashion • Department stores • DIY and home improvement • Electrical retailers • Florists • Furniture and furnishings • Leisure and entertainment • Loyalty and reward cards • Motor and auto accessories • Online and mail order • Pharmacies and health • Restaurants and takeaways • Retail marketing • Retail research • Retail trends • Shopping centres, malls • Supermarkets and grocery stores	American Home Products; eBay; BestBuy.com; Forbidden Planet; Ideasnyou.com; Maktoob.com; Nectar; Rama; Shop Direct; Shopping.com; Waitrose; Wickes Home Improvement; Woolworths. [13 brands]	Compare The Market.com; Google (2); Facebook; Ikea; John Lewis; M&S; Nandos; Uniqlo; Waitrose [9 brands]	Compare The Market.com; DFS; FCUK; Foxtons; Leon; McDonalds; Moonpig.com; Pret; Starbucks (2); Tesco; Wendy's [11 brands]
Telecoms	• Call services and accessories • Fixed line providers • General service providers • Internet service providers • Mobile and cell handsets • Mobile providers	AOL; BPL Telecom; British Telecom; BT Consumer; Nokia Global; Nokia UK; Panasonic; Sony; Virgin. [9 brands]	BPL [1 brand]	3Mobile; Virgin [2 brands]

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Sector	Descriptors	Brands worked on	Personal brand *liked*	Personal brand *disliked*
Tobacco	• Tobacco products	American Tobacco. [1 brand]	Rizla [1 brand]	
Toiletries and cosmetics	• Baby care • Bath toiletries, soaps • Contraceptives, family planning • Cosmetics, beauty aids • Deodorants, anti-perspirants • Feminine hygiene • Fragrance, perfumes • Hair care • Oral health • Shaving products • Skin care, sun protection • Toiletries and cosmetics market	Dove (2); Johnson and Johnson; Kotex; Liril; Oriflame Cosmetics; Ponds; Sunsilk; Unilever (2); Vaseline. [9 brands]	Aveda; Benefit; Chanel; Dove; Lush; Van Cleef & Arpels [6 brands]	*anti-Chinese; anti-perfume; anti-hair colouring / shampoos; anti-celebrity perfume;* Calvin Klein; Loreal; Lynx; Ralf Lauren; Tommy Hilfiger (2) [9 brands]
Travel, transport and tourism	• Airlines • Destination countries, regions, cities • Hotels • Rail, bus, coach, boat services, car rental • Travel agents, tour operators	British International Airports BIA; CalMac; Oberoi Hotels; Virgin; Visit London. [5 brands]	Singapore Airlines; [1 brand]	British Airways; Ryan Air (3); Transport for London; Virgin [4 brands]
Utilities and services	• Energy and water suppliers • Postal, courier services	US Postal Service. [1 brand]		

Sector	Descriptors	Brands worked on	Personal brand *liked*	Personal brand *disliked*
Wearing apparel	• Clothing, apparel • Personal accessories	Wilson Sports. [1 brand]	Agent Provocateur; Chanel; Converse; Dunlop; GAP; Quicksilver; Nike (3); Oakley; Ralf Lauren; Levis; Marc Jacobs; Mulberry; Tag Heuer; Van Cleef & Arpels; Uniqlo; Zara [16 brands]	anti-high fashion (2); Calvin Klein; Ed Hardy; FCUK (2); Jack Wills (2); Juicy Couture (3); Lacoste; Louis Vuitton; Ralf Lauren; Superdry; Tommy Hilfiger (2) [11 brands]

5.3.5.1 Key brand findings

Key findings taken from the data are as follows:

1. Industry sectors worked in

- The strongest representation was from *business and industrial*, followed by *government and non-profit, media and publishing,* and *leisure and entertainment*. As participants in the services industry (advertising and branding agencies), media, and academics were all selected based upon their brand experience, this came as little surprise. Furthermore, it supported the initial findings of the researcher derived from memoing, prior to issuing invitations to join the Delphi study

- However surprisingly, there were only 3 occasions when panellists cited favourite brands, which were ones that they worked on, or for. This could be due to several factors:
    - Panellist anonymity allowing for candid and real views
    - Panellists seek to explain and understand brands through exemplars and failures - regardless of whether they have worked for the brand
    - Brand professionalism does not necessarily translate into those professionals liking or disliking the brands that they worked on
    - Panellists wished to show the breadth of their brand experiences, through further examples
    - The brands which they cited had the strongest cultural identities and personalities, of relevance to the study

2. Brand consumption

- Panellists' value systems favour consideration of lifestyle personal choices, as opposed to corporate/professional opinions. *Wearing apparel; leisure and entertainment; retail; toiletries and cosmetics*; yielded the highest responses. Therefore, it appears that lines blurred - and it is argued that the influence of professionalism does not curtail generally held subjectivity and emotiveness. Furthermore, it is clear that professionals are also consumers - who think, feel and do comparably to the wider public Anecdotally, the researcher has experiences of market research agencies excluding marketing professionals from their data samples, due to a perceived effect of bias. In response, the researcher argues that such

concerns may be short-sighted and unnecessarily excluding articulate and reflective consumers

- The panel showed strong preferences for cars and fashion

- Fashion and cosmetics brands generated strong positive and negative opinions. Here, it is clear that preference does not necessarily generate the volunteering of opinion of justification

- *Apple* was cited widely, along with *Nike*. As they are both strong global brands, often also cited in branding literature, this is perhaps to be expected and evidence of the sample having generalizable and comparable traits to a wider public

- However, outside of the top global brands, Marmite was also cited favourably, with detailed justifications. Its cult status, driven by heritage; strong identity and personality values; innovative brand slogans and messages; and promotional activities, were seen to enhance the product offering

3. Ethno-cultural factors

- Heritage and national identity did not necessarily have a bearing on the brands which panellists had worked on, or the types of personal brand choices that they expressed

- Concerns over politics and product quality of Chinese commodities, appeared to have a negative impact on brands carrying a Chinese national identity, or country of manufacture labelling

- Comparably for one subject, the historical actions of Japan still appeared to have some bearing on the acceptance of Japanese brands – not due to quality concerns, rather on humanitarian and political grounds. This was expressed by a panellist of Chinese Asian origin

5.4 Conclusions

The following points summarise the main findings in this chapter:

- The Delphi study was concluded, based upon an analysis of the votes submitted by the panellists. Conclusion of the Delphi study was based upon an agreement that consensus had been reached. Therefore, data was judged to have reached saturation

- Literature pointed to consensus not having to be 'complete consensus'. Rather, a significant number of participants reaching an agreement

- The role of the researcher as a necessary motivator was considered when analysing the data, due to difficulties in ensuring full-participation. In this vein, face-to-face contact, in support of other communication methods, such as email, was thought essential

- Panellists were seen to be well-educated experienced professionals who had travelled extensively through their work and through residence

- There was representation from academics and practitioners; and junior and senior professionals

- Panellists hailed from culturally diverse backgrounds and comparably possessed culturally diverse social affiliations

- Ethnicity and cultural heritage were not necessarily are pre-requisite to which countries were worked/lived in, and social affiliations held

- Countries worked/lived in did not necessarily translate into forging social affiliations

- Panellists expressed self-defined complex hyphenated cultural identities

- Panellists collectively had worked on 185 brands, of international notoriety

- Panellists are accomplished professionals, who are also brand consumers with avid opinions

- The biographical data collected yielded rich cultural findings, which suggest the appropriateness of the sample and their interest in considering the field of research in the manner which the researcher had presented

- Collectively, consensus and biographical data are seen to provide a sound basis for considering the value and potential generalizability of the data collected in the main Delphi study.

Chapter 6 will now present the Delphi study findings, along with preliminary analysis and discussions, whilst linking Delphi data to that of the biographical data. In addition further methodological explanation and justification will be provided as to how the data was analysed.

Chapter Six: Delphi Study – results and findings

Analysing the empirical data collected from the Delphi study - culminating in a definitive phenomenological explanation of Brand-Culture relations

Chapter 6: Delphi study results and findings

6.1 Introduction

The following chapter presents the results gathered from the final round of the Delphi study, resulting from a culmination of three iterative rounds. Preliminary findings and discussions are presented next to themes and groupings, in tandem. In keeping with Delphi methods, as the final round builds on previous rounds and is reflective of consensus: previous rounds have been omitted from final data analysis – as the final round represents the complete body of knowledge. Furthermore, the final round is judged to be where saturation of data has been achieved. In order to provide structure to qualitative data analysis, data was grouped, filtered and analysed in several coding stages; using questioning and thematic tables, and geographic diagrams – with these culminating in reflexive phenomenological concept building. Finally, each sub-phenomenon was synthesised together using the same process in order to present one coherent phenomenon, designed to evaluate and test the focal theory – which is undertaken in Chapter 7.

6.2 Delphi data summary

Round One yielded approximately 11,500 words in total. These individual responses were then edited and grouped by the researcher into a document of approximately 5,700 words, which formed the body of knowledge for Round Two. The methods and approach to editing and grouping will be discussed in more detail in the next section.

In Round Two, voting scorecards were included at the bottom of each theme, as discussed in Chapter 5. Following Round Two, where additional responses were provided along with votes, which confirmed consensus, data responses expanded to approximately 6,500 words. Round Three presented the final collated and

edited opinions of 6,500 words and thus signalled the termination of the Delphi Study [Appendix 3].

In preparation for data analysis, the researcher considered varying types of triangulation methods – in order to guide different approaches towards answering the research questions. As research data was gathered using purposive theoretical sampling, the Delphi study data analysis was guided by four types of triangulation, as identified by Denzin (1989) – according to:

1. Persons, study groups, and local temporal settings in the study
2. *Investigator triangulation* – different observers or interviewers
3. *Theory triangulation* – approaching data with multi perspectives and hypotheses in mind, side-by-side
4. *Methodological triangulation* – within-method and between method triangulation (p.237-241).

When considering point one: subjects hailed from different organisations; countries; places of residences; levels of experience; professional roles; and industry sectors – which allowed for triangulation in Chapters 5 and 6.

Investigator triangulation is a term used to describe attempts to minimize bias resulting from one researcher. The Delphi study in practice empowers participants; and requires that they become engaged observers and interviewers of their peers - and hence the overall research exercise.

Theoretical triangulation was considered through Socratic elenchus negative hypothesis testing, by the researcher and panellists.

Finally, Chapter 4's reflections on the construction of a matrix blending Grounded Theory, Delphi, and Socratic elenchus were brought forward to this chapter – in order to apply methodological triangulation.

6.3 Methods and approach to interpreting Delphi data

Silverman (2011), Golden-Biddle and Locke (2007); and Daymon and Holloway (2011) suggest that the presentation of qualitative research is at its heart a rhetorical activity. Daymon and Holloway also give a particular focus to marketing communications and public relations research - of which the researcher also holds branding to be a component. Glesne (1999) groups the role of the qualitative researcher into three areas:

1. The artist
2. The translator or interpreter
3. The transformer

Clifford and Marcus (1986); and Bochner and Ellis (2002) argue that the rhetoric of qualitative writing can and should tend towards the poetic. Clifford and Marcus (1986) state that, *"the making of ethnography is artisanal, tied to the worldly work of writing"* (p.6). Eriksson and Kovalainen (2008) use Glesne's classification as a basis for framing 'the transfomer' as a *"catalytic educator whose aim is to help the readers to acquire new insights and perspectives on aspects of human interaction"* (p.284).

Therefore, from these it is argued that a central objective is to convince readers of the significance of contribution and quality of work undertaken – logically, emphatically, pictorially, and emotively. Daymon and Holloway (2011) also reflect upon the fact that whilst there might be different styles and approaches to presenting data, researchers should select what they deem to be the most appropriate approach - according to their philosophy, data and intended audience. To this end, as with any mode of communication, the researcher ultimately shapes orchestrated and structured rhetorical discussions in a manner, which draws from the researcher's relevant skills and competences.

The Delphi study followed interpretive phenomenological analysis, following the overall structure of the data analysis outlined by Smith and Osborn (2008):

1. Reading of a single transcript: noting initial comments and ideas
2. Generation of initial themes: transforming comments into themes
3. Searching for themes: collating similar codes and all data into potential themes

4. Review themes: checking to see if themes wok in relation to the dataset; looking for examples that do not fit; generating thematic maps and diagrams
5. Refining themes: refining specifics, linkages, generated propositions, and complexity associations.

As Delphi studies are reflective of continued reductive iterative and collaborative data analysis, the ability to select significant and key quotations from the final round is made both easier and analytically sound. Having identified key quotations and undertaken preliminary inductive analysis and sense building, deductive-inductive analysis was undertaken, using coding procedures. The process of coding blended techniques of editing, reduction and analysis, which relied upon: memoing, content analysis, diagrams and word-cloud software. Coding in this chapter follows three stages:

1. Stage one: open coding
2. Stage two: open coding, grouping words into keywords and ancillary words
3. Stage three: intermediate axial coding

Open coding signalled the start of reducing content into words, phrases and headlines as stand alone conceptual units and components of clauses. This was achieved by adapting and refining exploratory questions of content interrogation, which Krippendorff (2004), and Krippendorff and Block (2008) suggest need to be addressed in any form of content analysis.

Axial coding is a component of the process of testing and providing meaning to focal theory, as part of the research journey. Holsti (1969) argues that content analysis should also attempt to make inferences about the antecedents behind the opinions offered. Therefore, axial coding attempted to ground words within a contextual landscape, whilst further reducing the word count of conceptual units.

Open-ended structured questions and sub questions in the Delphi study meant that participants had been encouraged to undertake their own informal open and axial coding. Furthermore, as the Delphi is iterative, they were observed to do so several times. Therefore a key task of the researcher was to reduce data content, whilst preserving meaning and as much *In vivo* language as possible. To this end, through constant comparison, open coding was used to narrow down key opinions and to prepare them for more contextual and causal axial coding. This meant that the data was interrogated through questions which:

- Dimentionalized
- Raised the presence of properties, such as frequency, duration, intensity, precursors, manner, type – in order to present a multi-dimensional landscape

In-keeping with the nature of the study being cross-cultural, and blending philosophical underpinnings from traditional scholastic sources with the more recent, the field of Islamic sciences and jurisprudence were also considered. The reason being that the Islamic approach to interpreting information and deriving judgements relies heavily on: hierarchies of hermeneutic exegesis, citations from reliable sources and peer consensus. In support of this approach, Nofal (1993) discusses how the renowned Islamic classical scholar Al-Ghazali attempted to reconcile the struggle between the application of philosophy and religion in the real world, which he observed at the time was the reconciliation between Islamic and Greek culture. His conclusions were that religion and philosophy offered the guiding principles behind wider facets of human existence. Furthermore, the researcher and Adair (2010) acknowledge the contributions of Ibn Khaldun, who is considered by many Western writers as the 'Father of Sociology'. This is because in 1377, classical North African Islamic Scholar, Ibn Khaldun, wrote *The Muqaddimah* [Translated as: *Introduction to Universal* History] (Referenced translated version as, Ibn Khaldun, 2005), which is still referenced outside of Islamic and religious contexts, in the fields of economics, sociology, and culture

From an Islamic scholastic perspective, text passages form the basis for deriving further rulings and understandings, in the here and now and the future. Some of the approaches identified by Ramic, (2003) for interpreting texts for legal and linguistic rulings are listed as follows:

- The General Meaning (Arabic: *al-'Amm*)
- The Specific (Arabic: *al-Khass*)
- The Specification of Meaning (Arabic: *al-Takhsis*)
- The Apparent (Arabic: *al-Zahir*)
- The Explained (Arabic: *al-Muhkam*)
- The Alluded Meaning (Arabic: *Isharat al-Nass*)
- The Inferred Meaning (Arabic: *Dalalat al-Nas*)

It is clear from these perspectives that they share a strong correlation with modern-day qualitative marketing research methods. Therefore, these lenses were employed implicitly by the researcher when memoing and coding.

Following axial coding, intermediate coding was then used to generate explanatory phenomena - grounded within general, interconnected and specific contexts. Here, the appraisal of causes, consequences and strategies used in connection with the identified phenomena were considered. From these, the end destination was to move towards one identified and defined phenomenon, presented at the end of the chapter.

In practice, the process was a hermeneutical cycle of discovery, which flip-flopped [a term used in grounded theory settings] between open, axial and selective coding, in order to dimentionalise the theory. Therefore – as opposed to being a linear process towards 'grounding the theory', data analysis was a fluid process governed by a paradigm looking to establish relationships and patterns. As patterns appeared, they were cross-referenced deductively and inductively against current and previous memos, tables, codes and diagrams. Notably, Silverman (2011) discusses the need for qualitative analysis delivering a 'professional vision' – with this being arrived at through the cultivating a sense of *"creative, even playful, engagement with your archive"* (p.279).

Silverman (2011) goes onto recommend firstly using pen and paper over computer programmes. The reason being that computers can overly constrain the options available for marking and coding text – where 'scrawls' on paper can open up further opportunities for diagrammatic and thematic models. In the interests of taking advantage of the researcher's artistic skills and technology, both were employed. Word Cloud software was found to be a useful tool for harmonising pen and paper desk analysis, Word document text and pictorial representations.

The use of Word Cloud software, *Wordle* [wordle.net] as Geographic Information System (GIS) based Spatial Analyses, integrated within various methodological approaches is something that is being included in more and more websites and graphics in television news pieces (Cidell, 2010). It offers a quick and useful way to data mine and synthesise large amounts of text, in order to yield key and significant themes within one image. This meta-language approach to analysing data, achieved through blending network analysis and semiotic analysis produces network measures using qualitative data, to arrive at indicators such as knowledge domains, modality, paradigms and paradigm shifts (Süerdem, 2009).

Within the field of Geography, GIS is an established method of analysing data. Its usage to date has been used typically in the study of human geography, education, sociology, and media. More recently, it has been adopted by practitioners: as both an analytical and promotional tool in public relations, journalism, and corporate reputation – especially where appraising how the average person perceives their surroundings is of importance (Wakefield and Elliott, 2003). Its usage, like the Delphi tool, can be both quantitative and qualitative, and so is well placed to dove-tail into Delphi data analysis, using mixed-methods approaches. Cidell (2010) argues that GIS word clouds answer the call by Pavlovskaya (2006) to develop new ways to take social theory forward with regards spatiality, *"by visualising non-quantifiable experiences, bringing spatiality in explanations through spatial representations, and using the ontological power of mapping"* (Pavlovskaya 2006, p.2015). By combining GIS with ethnographic approaches, Nightingale (2003) Pain et al (2006) and Hurley et al (2008) find that triangulation can be attempted, which allows for the bridging and balancing of shortcomings of one traditional quantitative method over another qualitative method. This moves research towards grounded visualisations (Knigge and Cope, 2006).

When looking in particular at internet based Web2.0 GIS, embodied by Word Clouds (Cosh, Burns and Daniel 2008; Viégas and Wattenberg 2008), the principle builds on the work of Milgram and Jodelet (1976), where mental maps are created to generate meaning through visualisation. Harvey and Keane (2007) [cited in Cidell, 2010]; Kuo et al (2007) [cited in Cidell, 2010]; Harvey et al (2009) consider how word clouds are particularly strong when producing descriptive information. But if used exclusively in data analysis, they suggest that word clouds may not be well-placed to offer enough development of deeper relational concepts. It is for this reason that the researcher used them as a tool within a traditional open, axial, and selective coding grounded theory approach.

In this way, there is a natural synergy between this approach and that of Delphi – in that diagrams play a role in each and they attempt to filter information into a culminating form of consensus.

The aim was to analyse the didactic relationship between concepts, presenting

the mental map behind texts, in order to describe phenomena. Content was considered hermeneutically: word-by-word, sentence-by-sentence, line-by-line, and paragraph-by-paragraph. The words generated by the codes were then used iteratively to interrogate the text again, for three reasons:

- To consider whether any further words and concepts existed
- To determine whether any additional meanings could be derived from the same words, through syllogisms
- To judge whether conceptual extractions had reached saturation

This interpretive approach to identifying meaning was considered initially at paragraph level, where each paragraph is considered a statement connecting two concepts, according to sentence structures that use phrases such as 'refers to', 'is', 'signifies', 'makes', 'suggests', 'is in opposition to'. Discourses were judged according to proximity, frequency and terms of reference (positive, neutral and negative).

Furthermore, the researcher had piloted this approach to data analysis in another Delphi study, which resulted in a published paper in the *Journal of Brand Management* (Wilson, 2011a). Going through the peer-review process for the journal and also that for the Academy of Marketing's special interest group conference on Branding in Barcelona in 2010 (where the researcher presented his paper), was invaluable. It gave him confidence that a comparable approach within this doctoral study was appropriate; that he had sufficient mastery over such an approach; and the associated experiences yielded additional guidance, which has been incorporated with this study.

The next sections analyse panellists' responses, which sought to provide erudition concerning the main thread of the research study – looking at:

- Making sense of Brands and Culture
- The interplay between them
- Who manages them and how

The structure used for questioning panellists followed the order of treating brands and culture firstly as being separate questions. As panellists were experts in branding, the management questions were linked to those addressing brands. This was in the interests of establishing whether there were cultural elements present in branding and management, away from overtly considering culture in the first instance.

The following chapter [Chapter 7] then uses these thematic analyses in conjunction with the background theory and generated focal theory, which were hypothesised to reflect the conceptual frameworks necessary when guiding generative and emergent theory building.

6.4 Delphi Results and preliminary findings

As outlined with rationales in Chapter 3, nine Delphi questions were created, with three questions grouped under three themes [Figure 28]:

1. **Theme One:** Defining Brands, evaluating and calculating their performance
2. **Theme Two:** Brand management – definition, skills, competences and the role of the consumer
3. **Theme Three:** Making sense of culture and the interplay with branding
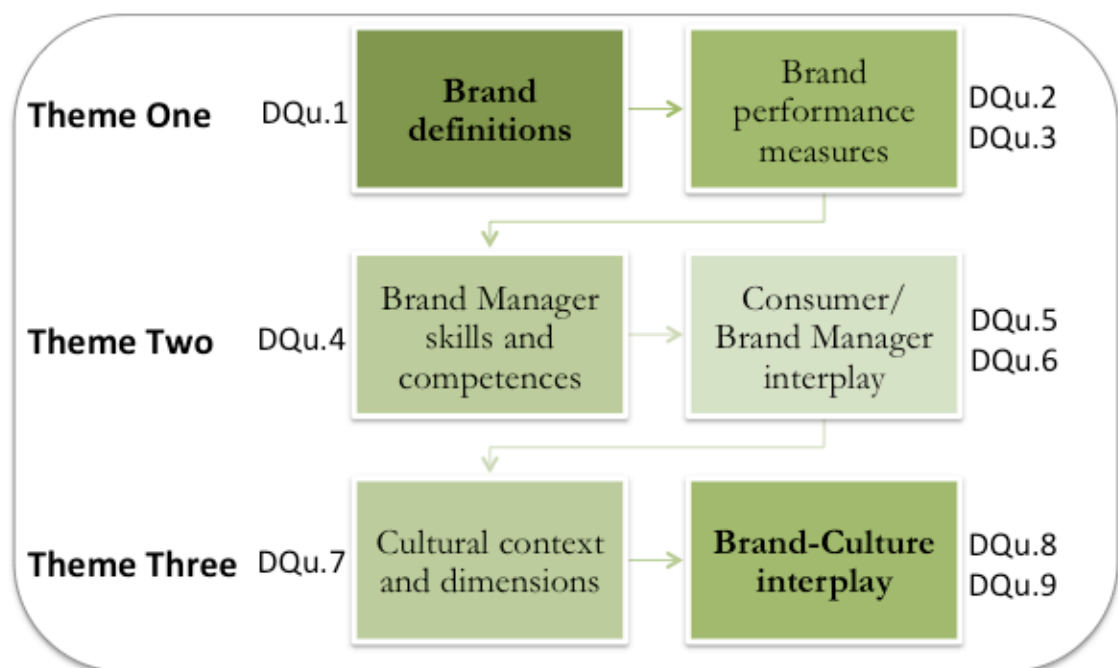
Figure28 Delphi questions: grouped and mapped according to research themes

The next sections will now present findings in more detail, with preliminary discussions[1].

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[1] Abbreviations:
DQu. – Delphi Question

6.4.1 Theme One: Defining brands, evaluating and calculating their performance

Questions posed:

The American Marketing Association (1960) defines a brand as: "A name, term, sign, symbol, or design, or combination of them which is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors."

Brand Channel (2009) defines brands as being, "a mixture of attributes, tangible and intangible, symbolised in a trademark, which, if managed properly, creates value and influence."

Professor Abraham Koshy (2010) talks of a brand being (1) the offspring of an organization's leadership, (2) constituting a promise given to consumers, (3) an 'affordable luxury', and (4) offering 'mass prestige'.

1. *What would you add and/or amend about these definitions? Also, do the same rules govern all brands, in all segments?*
2. *In light of academic discussions, which consider aspects of a brand's DNA, identity, personality, image and influence; how do you differentiate between successful, mediocre and poor brands? And following this point, what would you suggest brands need in order to improve?*
3. *It is debated whether it is possible to reflect upon enough of the intangible components of a brand within brand evaluations. How do you measure the value of a brand and what other steps could be taken to improve these calculations?*

6.4.1.1 Defining brands: key findings

The panel argued for brands being defined as a,

DST1: *"visual, aural and verbal encapsulation of the differentiating characteristics consumers attribute to that particular product or service".*

DST1: *[Brands] "have an identity which links them to an organisation and socialisation process which aims to communicate promises and values."*

DST1: *"Also, these things can be held as universal laws, which shape and affect all brands."*

These statements indicate that brands appear to engage more human senses than are usually reflected within standard definitions presented in the literature

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DST1 – Delphi Study Theme 1
DST2 – Delphi Study Theme 2
DST3 – Delphi Study Theme 3
OC – Open Code

review. The mention of sounds tallies with anecdotal observations by the researcher of brands such as *Intel, McDonald's,* and *T-Mobile* using sounds in advertising to reinforce their brand identity and recall [termed: sonic branding, audio branding, sonic mnemonics, advertising ditties, amongst others]. A further observation of this sentence lies the fact that brands are judged to be defined and understood most significantly from a consumer's perspective. This supports the trend in literature of raising the presence of consumers in academic and practitioner thinking. It also marks a starting point for the researcher's investigation of wider perspectives of consumption, according to stakeholdership.

In support of current brand definitions falling short of defining all facets of a brand, the panel states that,

> DST1: *"brands are much more than logos, or trade marks"*

> DST1: *"Recently, more brands also appear to link themselves closely to design and designers"*

In addition, the panel were sceptical about Abraham Koshy's suggestions that brands are affordable luxuries, which offer mass prestige. The researcher suggests that this was because they were more in favour of a brand being viewed as a human: which therefore moves against brand objectification; or as an extension of the same philosophical argument of humanisation - that humans aren't affordable luxuries, who offer mass prestige.

From panel discussions, it is clear that they felt universal brand definitions could be created, but they needed to offer greater focus on the intangible aspects of a brand and the nature of human interaction.

The mention of engaging human senses also appears to be something that goes beyond the physiological:

> DST1: *[there is]* *"a cultural context, which evokes emotional and cognitive attachments, that guide our behaviour - and these bring brands to life"*
>
> DST1: *"Brands can be judged in a similar fashion to human beings"*
>
> DST1: *"Brands have true essence, meaning, value, soul and emotion"*

This statement reinforces the concept outlined in the focal theory of brands enjoying a state beyond transience, to transcendence. In addition, with the

mention of 'soul' and 'emotion', the thinking is that brands are in possession of human characteristics. This was also explicitly mentioned by the panel:

> DST1: *"It can be argued that a brand has a human-like existence"*

When considering the socio-cultural aspects linked with brands, the following points were made:

> DST1: *"Brands are defined first and foremost by their personality...which in successful cases is reflective of...traditions...heritage and national pride"*
>
> DST1: [brands] *"define small elements of a life"*
>
> DST1: *"brands have a cultural context...so brands have a cultural, social and political persona"*
>
> DST1: *"The intangible aspects of a brand are significant and allow them to be multi-dimensional – so they mean different things to different people, all at the same time"*

And so opinions suggest that, once a brand has been created and exists in a human-like manner, this in turn places it in a cultural setting, of which the brand is also an active participant. Brand intangibility elements allow for more and wider stakeholder engagement - as each ascribes meaning to a brand. With intangibility driving multi-dimensionalism, context and time are of significance. The researcher considers further if multiple contexts also change interpretations and units of time. This is especially due to the fact that with the panel asserting that culture has a context, the definition of culture points towards it being comprised of concentric levels of cultural meaning.

Therefore at this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Current brand definitions fall short and have gaps
- It is possible to create one universal brand definition
- Brand understanding needs to be derived from an acceptance of the consumer perspective
- Brands are *human-like*
- Brands are active participants in a cultural context, space and time
- Brands in turn help to define small aspects of life

6.4.1.1.1 Defining brands: open coding

OC1.1.1a: WHAT IS?	Visual, aural and verbal encapsulation of differentiating characteristics. More than logos and trademarks. Not an affordable luxury offering mass prestige. More than communicated in existing definitions.
OC1.1.1b: WHAT HAS?	Essence, meaning, value, soul and emotion. Intangible aspects. Universal laws. More than previously known. Identity linked to an organisation. Cultural, social and political persona.
OC1.1.2: WHO?	Attributed by consumers, then transferred onto company, commodity and users. Design and designers.
OC1.1.3: HOW?	By personality. Human-like existence.
OC1.1.4: WHEN? HOW LONG? WHERE?	Changes with context. Changes with time. Recent expansion into remit of design and designers. Cultural context. Multidimensional. Expansive.
OC1.1.5: HOW MUCH? HOW STRONG?	Intangible aspects more significant.
OC1.1.6: WHY?	Drives behaviour. Allows for multi-dimensionality. Defines life. Brings brands to life. Different things to different people.
OC1.1.7a: WHAT FOR, MARKETER?	Define small elements of life. Drive consumer aspiration. Evoke emotional and cognitive attachments to guide consumer behaviour. Bring brands to life.
OC1.1.7b: WHAT FOR, CONSUMER?	Define small elements of life. Different things to different people. Cultural, social and political persona. Identity linked to an organisation.
OC1.1.8: BY WHICH?	Skill, image, traditions, intelligence, heritage and national pride. Culture. Collaboration. Socialisation process, which communicates promises and values. Design.

Table 19 Defining brands - open codes

Figure 29 Defining Brands - open codes as a Word Cloud

Keywords	Ancillary words
Life	Visual
Cultural	Aural
Things	Verbal
Design	Essence
Persona	Meaning
Identity	Value
Political	Universal
Different	Laws
Context	Commodity
Changes	Human
Define	Time
Element	Multidimensional
Intangible	Expansive
Designers	Emotional
People	Cognitive
Organisation	Collaboration
Consumer	Skill
Linked	Image
Social	Tradition
Aspects	Intelligence
Behaviour	Heritage
	National
	Pride

Table 20 Defining brands - keywords and ancillary words derived from Word Cloud

6.4.1.1.2 Intermediate coding axial analysis discussions

The opinion of the panel is that many current brand definitions, know to them, do little to reflect the true nature and function of present-day branding

accurately. Furthermore, new knowledge concerning brands continues to be unearthed.

What they have observed is that brands do conform to universal laws, but rather than these being an identity only subject to trademarks; legislation; and functional design, represented by things such as a recognisable logo; they are in fact comparable to humans and similarly as complicated. To this end, brands have esoteric and emotional facets, which expand the concept of design and the relationship that people have with brands. This means that brands are firmly rooted in a cultural context of multidimensional collaboration, which is subject to the whims of consumers. In addition, influencing culture is seen to be a broad construct, driven by wider factors like: heritage, national identity, politics, language, and everyday socialisation. As a societal contributor, brands evoke cognitive, emotional and behavioural attributes within engaged individuals. Individuals then transfer these traits onto the brand itself, through reciprocity. This results in the enrichment of dynamic personas and aspirations of the associated stakeholders, commodities, organisations and cultures.

6.4.1.2 Brand evaluations: key findings

Whilst the humanisation of a brand is a pursuit of organisations and associated stakeholders, it is not seen to be hollow rhetoric, or a marketing gimmick used as a veneer to hide commodity short fallings.

> DST1: *"...brands should be able to demonstrate strong, clear and consistent links with the function of their product/service. These have to be truthful, authentic, emotive and credible promises, which also indicate differentiation and benefit"*

Therefore, it appears that successful brands are not only human, but they are also responsible and professional 'humans'. Furthermore:

> DST1: *"This process has to be built up over time and needs to be communicated to consumers and stakeholders"*

From these statements, the allusions are that evaluations are a collective pursuit, whose findings require stakeholder ratification. Furthermore, they are a process of bringing tacit information into the open - by encouraging transparency and

credibility. This leads to strength of brand proposition – through trust, engagement and an understanding of what is unique; which culminates in a potential commercial success factor, inherent value and positioning as a relationship partner.

When examining relationship bonds in more detail:

> DST1: *"brands all share a commonality of a nub of timelessness – through an emotional element which should not be overlooked"*

> DST1: *"brands embed themselves into a network of interconnected bonds and experiences, which prevent them from being replaced"*

Again, the panel have expressed the significance of emotions in branding and specifically here evaluative processes. These evaluations and emotions are linked to time, over the short and long term; and are interconnected within a diffusion network.

> DST1: *"today's markets demand co-creation – and brands that have shown high share of mind, heart and wallet are those that initiate dialogue between company and the target audience"*

> DST1: *"This requires visionary management, with a clear and qualified understanding of consumers' needs and motivators; and reliable quality customer and competitor research"*

Finally, when panellists considered aspects of a brand's DNA, identity, personality, image and influence: they suggested that clearly defined and articulated brand attributes with consistency lead to stakeholder influence. Multiple personalities, lack of knowledge and whimsical market chasing tactics brings a brand down to mediocrity or even poor performance. Therefore, it would appear that successful human brands have a strong character, which can be charted over the long term. Brands can be used in different ways for different offerings over time, however like humans, their DNA, identity and personality remains fixed – with this being their nature and strength. This could be translated into a concept of 'knowledge of self.

Recall was held to be a key element supporting competitive brand health and longevity:

> DST1: *"Brands that have the highest unaided recall and high sales from markets, other than the country of origin, are considered to be successful. Brands that fare well on aided recall and register average sales are mediocre.*

> *Brands that fail to create an impact on the minds of people, or influence consumer purchases are poor"*

As a further refinement of this point, subject 23 who was discussed in Chapter 5 as registering low votes, challenged concepts of personality and recall.

> DST1: *"there is an argument to say that this is all old old thinking...Decision process is more emotional than rational, so function is only 25-30% of decision process. Unaided recall? Give me a break! Everyone knew GM (General Motors) and they went bankrupt"*

The researcher took this as a signal to suggest that existing terms need refining, extending and redefining to accommodate new evidence, thinking and market trends. However, it appears in branding that this may pose challenges:

> DST1: *"A company and/or brand will always be valued on future potential revenues"*

> DST1: *"This does not however create a precedent for what defines a 'successful brand' - as this can only be defined by the brand itself and the subsequent perceptions of others. Furthermore, brands cannot remain static – they have to innovate and respond, whilst maintaining a sense of heritage and permanence"*

> DST1: *"I just wonder, in the case of a 'genius' creating a successful brand almost over night, how would you analyse it?"*

It is observed that with the increase in online usage and online brands, that overnight viral brand success may increase.

Therefore at this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Many brand evaluation methods fall short and have gaps
- It is possible to create one universal brand evaluative framework
- Brand evaluations needs to be derived from an acceptance of engaged stakeholders
- Brand evaluations have to preserve a human element
- Brands exist in a context, space and time

6.4.1.2.1 Brand evaluations: open coding

OC1.2.1a: WHAT IS?	Calculation. Based on future potential revenues. More than sales calculations. Not a precedent for a successful brand. Similar to a brand scorecard. Difficult to achieve with overnight brand successes.
OC1.2.1b: WHAT HAS?	Link with share prices. Commonality. Benefit. Data on brand attached to product/service function. Evidence. Ranking. Emotional element. Competitor analysis. Quality component. Recall element.
OC1.2.1c: WHAT HAS TO BE?	Influential. Coherent. Strong, clear and consistent. Truthful, authentic, emotive and credible. A promise. Beneficial. Visionary. Managed by those who understand needs and motivators of consumers. Reflective of marketer-consumer co-creation.
OC1.2.2: WHO?	By Managers. By Marketers. By Consumers. To Consumers and Stakeholders
OC1.2.3: HOW?	Strong, clear and consistent. Establishing truth, authenticity, emotiveness and credibility. Evidence.
OC1.2.4: WHEN? HOW LONG? WHERE?	Conditional. Over time. Element of timelessness. Permanence. Not static. Applicable across the world.
OC1.2.5: HOW MUCH? HOW STRONG?	Sufficient to achieve and communicate objectives. Enough to occupy a defensible position.
OC1.2.6: WHY?	Establish brand-product/service links. Establish stakeholder links. To communicate evidence and emotive messages. Provide evidence to affect share prices, loyalty, perceptions, behaviour. Define form, function and value. To help encourage reliability, desirability and value. To help embed into a network of interconnected bonds and experiences. Ultimately contribute towards an uplift in additional revenue. Prevents wastage or overlooking of success factors.
OC1.2.7a: WHAT FOR, MARKETER?	Determine brand loyalty potential, value and function. Source of collated evidence. Link with sales. Means to map out differentiator. Means to define essential elements and their impact on stakeholders. Ranking tool. Process of understanding how to embed into and influence stakeholders' perceptions and behaviour. Process of increasing share of mind and recall.

OC1.2.7b: WHAT FOR, CONSUMER?	Determine future purchase decisions. Shape perceptions. Brand ranking.
OC1.2.8: BY WHICH?	Net present value. Demonstrating consistent brand links with function of product/service. Competitor analysis. Primary and secondary quantitative and qualitative data. Collaborative dialogue.

Table 21 Evaluating brands - open codes

Figure 30 Evaluating brands - open codes as a Word Cloud

Keywords	Ancillary words
Value	Calculation
Function	Difficult
Consistent	Commonality
Evidence	Benefit
Perceptions	Emotional
Share	Quality
Links	Recall
Determine	Influential
Establish	Coherent
Clear	Truthful
Prices	Authentic
Process	Emotive
Stakeholders	Credible
Consumers	Promise
Analysis	Beneficial
Sales	Visionary
Future	Co-creation
Communicate	Conditional
Ranking	Timeless
Behaviour	Permanence
Competitor	Dynamic

Product/Service	World
Element	Links
Loyalty	Interconnected
	Revenue
	Success

Table 22 Evaluating brands - keywords and ancillary words derived from Word Cloud

6.4.1.2.2 Intermediate coding axial analysis

As the panel feels that agreeing on a tenable and universal brand definition is possible, it follows that brand evaluations are also problematic. Nevertheless, evaluative calculations should be attempted and governed by an approach, which maps out a hierarchy of causal links, networks of influence and ultimately those factors that drive brand success, loyalty, stability and revenue generation.

Evaluations should be considered time specific, dynamic and a collaborative process. Furthermore, with so many stakeholders being involved and approaching evaluations from different perspectives (for example consumer evaluations), which they then look to share, there has to be a commonality in thinking - in order to preserve their relevance and understanding by many. This pushes evaluations into being emotive, visionary and qualitative. Therefore, it is argued that depending on the context and stakeholder, hard factors such as sales and price, will be interpreted differently and most likely as an indicator of relationship strength.

6.4.1.3 Brand calculations: key results

Observations suggest that there are concerns as to the motive behind why many brand calculations are undertaken.

> DST1: *"The use of 'brand equity' is loose and not targeted or descriptive of what equity is in today's marketplace"*

> DST1: *"Most frequently, brands are evaluated in the context of specific campaigns, which serve an additional purpose of driving longer-term brand value"*

> DST1: *"[Brands] are measured in economic terms i.e. revenue generation. This is done via bespoke audience research (which is very expensive, so tends to be done infrequently)"*

> DST1: *"These calculations are then used as a health-check for channel brands, and on a more ad hoc basis for programme brands, as necessary. In addition, viewing figures and audience appreciation indices are used, although there are debates as to whether these have more to do with sales, rather than brand value"*

> DST1: *"Nowadays, it is a seemingly frequent occurrence to find a brand's value being quantified and monetised, but with no realistic intention of sale"*

Furthermore:

> DST1: *"the value of the brand in the mind of consumers must also be factored in"*

When examining these points collectively it appears that there is a disconnect – as the value of a brand may encourage its sale, which would impact on the relational bonds forged with consumers.

> DST1: *"Brand extensions, or the launch of a product in a new category, by using the name of a high equity brand, are also a common method of leveraging the high equity of the brand"*

> DST1: *"A sure sign of high brand equity within a certain category is the use of a brand name to define all products of a certain type. For example, referring to any paper tissue as a Kleenex demonstrates the high brand equity of this product in the paper tissue category"*

> DST1: *"Corporate branding and Product branding also seem to be mixed up in places. In many cases we have seen the life of brand is beyond the existence of a company - e.g.: Pan Am or Lehman Brothers. The brand equity is so powerful that it diminishes very slowly for accepted brands"*

Anecdotal observations by the researcher cite: *Innocent* selling 58% shares to *Coca-Cola,* (Macalister and Teather, 2010), and *Body Shop* being sold to *L'Oreal,* (Mail Online, 2006), being reported as 'sell out' deals, which damaged *Innocent's* and *Body Shop's* ethical and consumer friendly community credentials.

And so, panellists felt that:

> DST1: *"Effective measurements of brand value should therefore be a combination of the financial contribution the brand makes to the organisation, alongside regular consumer research on the worth of the brand to the consumers"*

However, with such collaborative and transparent research understanding, care and consideration should be taken towards how this information is used strategically. If monetisation involves forging new bonds, which are held to be purely for financial gains, then consumer-spearheaded stakeholders are likely to be less than happy. This in turn will render the brand a 'selfish human' and one whom friendship bonds should be forged with caution, if at all, over the long

term. Panellists suggest that a way of preserving relations lies in giving an importance to the calculation of societal goodwill and environmental impact.

Continuing discussions considering the influence of online, the panellists also highlight the effect of the dot.com era on calculations.

> DST1: *"Paradoxically, we often see brands sell for much beyond the anticipated sale price – a common occurrence in brand valuations when the industry/sector it operates in is clearly new, misunderstood of both"*

When appraising calculations according to time and human components, panellists used the term *'health check'*. This metaphor implies that calculations are:

- An indicator
- Potentially an information-based tool
- Humanoid
- A going concern
- Something that needs to be taken and assessed regularly

Furthermore, looking deeper into the metaphor, health-checks in humans differ according to factors such as age and genetics. Looking even deeper, health checks also have to consider factors such as gender and race. Therefore, if a brand had a more feminine and ethnocentric DNA, identity and personality for example, then the health check should reflect this.

Therefore at this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Many brand calculation methods fall short and have gaps
- Furthermore, they are open to abuse and a betrayal of consumer-centric stakeholders, by organisations
- It is possible to create one universal brand calculation framework, but it needs to be flexible enough to encapsulate the human aspects of a brand and their relationship bonds
- Again, brand calculations needs to be derived from an acceptance of engaged stakeholders
- Brands calculations or 'health checks' exist in a context, space and time

6.4.1.3.1 Brand calculations: open coding

OC1.3.1a: WHAT IS?	Fragile. Complicated. More subjective. Codification of tacit knowledge. Governed by context and purpose. Perception-based. Health check. Often paradoxical. Derived from market share and profits. Less appropriate than brand evaluation calculations.
OC1.3.1b: WHAT HAS?	Actual sales. Profit/Loss. Intangible element. Evaluation of potential. Evaluation of brand extension potential. Consideration of equity associated with name.
OC1.3.1c: WHAT HAS TO BE?	Motivational. Able to evaluate: societal goodwill, environmental impact, and transparency.
OC1.3.2: WHO?	Primarily marketers. Secondarily stakeholders
OC1.3.3: HOW?	Deductive/inductive Quantitative and/or qualitative - depending on available data, position and purpose.
OC1.3.4: WHEN? HOW LONG? WHERE?	Perishable. Time specific. Linked to campaigns. Ad hoc. Longer than that of the commodity.
OC1.3.5: HOW MUCH? HOW STRONG?	Vulnerable.
OC1.3.6: WHY?	Designed to drive long-term brand value. Health check.
OC1.3.7a: WHAT FOR, MARKETER?	Health check. Marketing tool.
OC1.3.7b: WHAT FOR, CONSUMER?	Component of self-worth. Consumer-based equity.
OC1.3.8: BY WHICH?	Economic methods. Revenue. Mixed-methods audience research. Secondary data.

Table 23 Brand calculations - open codes

Figure 31 Brand calculations - open codes as a Word Cloud

Keywords	Ancillary words
Health	Fragile
Check	Vulnerable
Evaluation	Complicated
Purpose	Subjective
Data	Tacit
Equity	Perception
	Paradoxical
	Market share
	Profits and Loss
	Sales
	Revenue
	Potential
	Intangible
	Motivational
	Society
	Goodwill
	Environmental
	Impact
	Transparency
	Stakeholders
	Consumers
	Deductive
	Inductive
	Perishable
	Time
	Campaigns
	Ad hoc
	Long-term
	Value
	Economic

Table 24 Brand calculations - keywords and ancillary words derived from Word Cloud

6.4.1.3.2 Intermediate coding axial analysis discussions

Brand calculations are seen to be of less use to the panel of brand experts. This is because they are viewed as being a cruder version, or mere element of brand evaluations. Brand evaluations are also held to be of more worth, because of their recognition of consumers and stakeholders, rather than attempting to ascribe a numerical value to influence shareholders. Therefore brand calculations are more of a 'health check', or a tool for driving equity and less about understanding valuable networks of relationships. Ultimately, this means that they are a motivational indicator and initiative, which may deliver a stronger brand. However, treating data in this way may lead to a paradox or vulnerabilities – in that brands seek meaningful and real human relationships, but the calculation is one rooted in economics, based on overt pursuit of profits – which may lead to a brand disconnect. As a remedy, the panel suggests that softer factors such as societal goodwill and positive influence on the environment should be included.

6.4.2 Theme Two: Brand management – definition, skills, competences and the role of the consumer
Questions posed:

4. *What education, experience, skills and competences should brand managers have and what from your experience tends to be the norm?*
5. *Consider who is involved in the management of a brand and the parties, inside and outside of an organisation, that are able to exercise control. Also, as brands are seen to possess their own human-like attributes; what are your views on whether brands are defined by their consumer segments and wider stakeholders - or alternatively is it brands and managers that are shaping the agenda?*
6. *Is there any difference between how brand managers and brand consumers perceive their ability and legitimacy to influence the behaviour of a brand?*

6.4.2.1 Brand managers - definition, skills and competences: key findings

In this section, questions 4 and 5 have been analysed together, in order to consider both a narrow/specific view of brand management, according to a professional title; and one where management is a self-appointed diffused function.

The following comments encapsulate the *raison d'être* of a brand manager:

> DST2: *"Brand Managers are guardians of the essence of the brand and they have to understand how their product adds value to lives"*

> DST2: *"The Brand Manger needs to be anchored firmly in the cultural context in which the brand operates"*

The term 'guardian' belies the importance of management as a parental function nurturing especially the intangible factors of a brand, and how they influence others. In addition the use of the word 'value', in connection with more than one individual in a general sense, indicates that evaluations are collective and broad-based. Relating this to Theme One, it is clear that the role of a manager is similar to that of a brand, which is to deliver to an identified proposition to a collective.

Building on this point:

> DST2: *"Brand managers need to understand society, the consumer, and the little triggers that lead to a big purchase"*

> DST2: *"In some respects however, formal education is of less importance than experience, skills and competencies"*

> DST2: *"Brand Managers should have a blend of science and arts in their education, should use the left and right part of the brain equally, should have diagnostic skills for the consumer's preferences. However, care should be taken with the left/right brain categorisation, as this is highly contentious"*

> DST2: *"Strong analytical ability to understand nuances of different markets and put into play different marketing strategies relevant to them. Should be clear communicators with strong creative and strategic sensibilities. 'People people'. Good forward planning skills and transformational leadership qualities"*

A brand manager's approach should be one concerned with the minutia of societal norms, values, consumption, opinions and practices – for a greater goal. This tallies with the 'bird view' of the cultural approach to branding, which suggests a top-down bottom-up perspective. However, with the indication that understanding society is of significance, the researcher argues that the starting point should be one from 'outside-in'. Namely, a consumer societal view of matters, which considers the brand manager as being an active participant, rather than being a disengaged observer. Furthermore, when considering anthropological perspectives, this concurs with the idea that there is less a case for 'good' and 'bad' and one more for 'there just is'. However, as a refinement on the anthropological standpoint, the brand manager is seen not as a reporter, but more of a societal ambassador.

With brand managers taking such an engaged and socio-cultural role in brand management:

> DST2: *"Brand managers should not be guided by quarterly sales targets"*

> DST2: *"No point having someone who knows the mechanics of getting a brand out there via channels, if they do not have a message..."*

Therefore, it appears that sales will follow reciprocally, only when stakeholders' needs are met - which shows that they understand stakeholders. This positions brand management as a relational, rather than a transactional function of marketing.

When considering the career paths of brand managers, it would appear that sales experience tends to be a deciding factor.

> DST2: *"Brand Managers are people (usually) who have risen within the hierarchy of marketing departments, usually from sales...However for historical reasons, it is possible that some industries may resist appointing brand managers from sales...the competencies required for sales and marketing are very different"*

From this statement it is clear that whilst this is the norm, it may not be the ideal. As has been argued, sales has strong elements of driving transactions, whilst branding aims to adopt a relational approach, which sales professionals may be ill-equipped to deliver. Within this study, there is insufficient opportunity to test how true this observation is. Because for example: sales (especially in key accounts and business to business settings) may follow a relational approach; or the reason that professionals gravitate away from sales towards branding is because they are better suited; or even that sales are a known means goal to a career in brand management.

Along with tried and tested experience, qualifications are also seen as a means goal:

> DST2: *"Basic graduation in any subject, with at least 5-10 years experience. Education above degree level is desirable, but not necessarily a prerequisite"*

Due to the suggestion that the subject of study is of little importance, it appears that both the process and influence of education, and what it communicates to those in authority are of more importance than actual degree subject knowledge.

> DST2: *"Let's all remember: communication channels change faster that the schooling system can change curricula"*

When looking at what knowledge is required, it appears that societal insight, derived from the media, and that which is contextualised according to various political factors are important. Furthermore, advertising and public relations are seen to be the most appropriate marketing tools of engagement.

> DST2: *"Brand managers should also be sensitive to media and PR – with a clear understanding of political context"*

> DST2: *"The skill set or characteristics of a good brand manager are similar to those of most roles within the advertising/marketing communications, communications/public relations/brand spectrum"*

Underpinning a brand manager's approach, the guiding principles orientate a brand manager towards:

> DSt2: *"the ability to think strategically and tactically, understanding a brand's heritage, its understanding of the world and who are its stakeholders"*

Here, brand managers have to be able to draw from relevant current and historical cultural perspectives, which connect them with society. From the extensive list of essential skills, competences and attributes required by brand managers, as provided by the panel, the researcher created the following groupings:

- **Skills:** Research, analytical, communication, listening
- **Mind-set:** instinctive, visionary, creative, entrepreneurial
- **Knowledge:** regulatory guidelines, consumer and market trends, consumer reactions

Practically, these culminate in a brand manager's:

> DST2: *"ability to develop succinct and effective verbal and visual (brand) vocabulary"*

However, with the Delphi panel offering suggestions, guidance and a prescriptive list, they also raised practical concerns:

> DSt2: *"it's worth considering that many brand managers have virtually no training in research, though it is high up the list"*

> DST2: *"...it is difficult to find people with all these skills"*

Therefore, the researcher considers whether gaps in literature and differing degrees of 'failure' of brands in fact lie at the doorstep of brand managers, who may have insufficient:

- Skills and competences
- Training and branding experience
- Knowledge and understanding

- Opportunity and/or experience of societal/stakeholder engagement
- Opportunity to 'top-up' and update skills, knowledge and understanding
- Support from peers and senior decision makers
- Reward and recognition of more important brand management factors

As an extension, it could also be argued that gaps appear due to the same factors affecting academics and their research activities. Again these questions can only be addressed in part within this study, as they necessitate a field of study of their own - due to the complexity of causal factors. They do however present another possible future topic of investigation.

At this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- It is possible to create universal guidelines for brand manager skills and attributes, which are transferable to other marketing communications disciplines - such as advertising and public relations
- However in practice, current brand managers may fall short and have gaps in their skills and competences, due to the complexity of the field, relationship issues and level of experience needed
- Whilst in reality sales roles play are part, they are seen to be less crucial - not because of their unimportance, but because the associated skill sets and mind-set offer less value to brand management
- Brand management needs to be derived from an acceptance of the consumer perspective
- Brand mangers like brands need to draw from all facets of human existence
- Brands are active participants in a cultural stakeholder context, space and time
- Brands mangers need to understand small aspects of life in society and offer succinct verbal and visual triggers
- Aspirationally, brand managers need to be vision-setters and leaders

6.4.2.1.1 Brand managers - definition, skills and competences: open coding

OC2.1.1a: WHAT IS?	Guardians of brand's essence, heritage and stakeholders.
OC2.1.1b: WHAT HAS?	Understanding of adding value to lives of buyers. Knowledge of marketing channels. University degree. Experience. Skills and competences. Social sciences and Arts education. Forward planning skills. Leadership skills. Strategic thinking.
OC2.1.1c: WHAT HAS TO BE?	Understand consumers. Sensitive to media and Public Relations. Postgraduate standard. Manager. Creative. Entrepreneurial. Strategic. Tactical. Analytical. Instinctive. Reductive. 'People-people' Transformational leader. Visionary.
OC2.1.2: WHO?	Marketers. Salespeople. Sales and Marketing people. Non-Salespeople. Engineer. Graduate.
OC2.1.3: HOW?	Messages to customer. Adding life value. Understanding political context. Blending social sciences, literature, films, art, theatre and music. Exposure to lifestyles and habits. Peer-support. Consumer focussed. Strategic thinking.
OC2.1.4: WHEN? HOW LONG? WHERE?	360 degree perspective. Long-term. World-view. Stakeholder engagement. Society.
OC2.1.5: HOW MUCH? HOW STRONG?	5-10 years experience. Leadership.
OC2.1.6: WHY?	Competence. Career potential. Global success. Consumer acceptance of brand.
OC2.1.7: WHAT FOR, MARKETER?	Protect against direct and indirect competitors. Financial stability. Long-term stability. Stakeholder cohesion. Societal and life value.
OC2.1.8: BY WHICH?	Industry and market know-how. Research consumer markets and market trends. Analyse pricing and profitability. Consumer innovation.

	Creating new names. Overseeing advertising buying and production. Liaising with designers. Assessing guidelines and regulations. Creativity. Entrepreneurship. Verbal and visual vocabulary. Reductionism. Marketing communications. Public Relations. Advertising. Competitor analysis.

Table 25 Brand managers - open codes

Figure 32 Brand managers – open codes as a Word Cloud

Keywords	Ancillary words
Strategic	Guardians
Consumer	Heritage
Leadership	Channels
Understanding	Forward
Thinking	Entrepreneurism
Public Relations	Tactical
Long-term	Analytical
Marketing	Instinctive
Markets	Reductive
Creativity	'People-people'
Stakeholders	Transformational
Stability	Visionary
Degree	Sales
Social Sciences	Engineering
Arts	Messengers
	Adding life-value
	Context
	Politics
	Peer-support
	360 degree view
	Engagement
	Society
	5-10 years experience

	Research
	Guidelines and regulations
	Advertising
	Marketing Communications
	Media
	Naming
	Cohesion
	Vocabulary
	Competitive
	World-view
	Trend-spotting

Table 26 Brand managers – keywords and ancillary words derived from Word Cloud

6.4.2.1.2 Intermediate coding axial analysis discussions

Brand managers are guardians of a brand's essence, its heritage and its stakeholders. They provide a stabilising influence to dynamic relations and environments. The role of a brand manager is seen as being a challenging cross-disciplinary role. As such, brand managers may hail from a variety of backgrounds, but they should be educated to at least degree level and ideally demonstrate an aptitude comparable with that of postgraduate level. This observation may have been because the panel all hold degrees and in some cases higher qualifications. However, they expressed that it was not the qualification that mattered, instead it was the level which managers were able to demonstrate - and formal qualifications offered a good indicator. In addition, practical knowledge and experience was held to be paramount. Varied real work experience is a safeguard against the risk of stagnant thinking, which may result from having followed a linear route through more structured roles, such as sales or engineering - which were seen to have insufficient grounding in the social sciences.

Brand managers need to be strategic and creative thinkers; who can garner the support and recognition of peers across marketing functions. Beyond this, they need to reflect upon and embody the consumer experience wherever possible. To this end, they need to have a 360-degree view of the competitive environment and society, over the long-term. Balancing this, there also needs to be a tactical and entrepreneurial approach, which can capitalise on emerging trends. This management intuition and ability to read and collaborate internally and externally through messages; means that brand managers have to be able to unite people via emotive, reductive and visionary communications.

Ultimately, it appears that the panellists' suggestions point to brand managers in fact being leaders, who have a broad-based education, which encompasses not only marketing communications and market research, but also cognitive behavioural psychology, the social sciences, politics, popular culture, design and the arts.

6.4.2.2 Consumer-Brand Manager interplay: key findings

Panellists' responses concur with the idea that brands and brand management are no longer simply a transactional economic pursuit of commercial gains. Instead, they are first and foremost about collective ownership, derived from consumption and relationships.

> DST2: *"In a fast moving consumer goods context, which is driven by one-way communication primarily on mass media, brand managers would perceive themselves as having a more direct control and legitimacy to control the behaviour of a brand. Consumers of these categories would see themselves as having less control. The main tool of control would the ability to walk away from a brand and switch to using another one. But the absence of conversation between consumer and brand manager would create an imbalance of perceived control in favour of the manager"*

> DST2: *"In service industries though, because there is a stronger personal link between the consumer and the company/person that manages the brand, consumer would perceive themselves as having more direct control on a brand. In this scenario, the interaction with consumer could be quite empowering for brand managers, as well leading to a balance between consumer and brand manager in terms of control and influence on the brand"*

> DST2: *"A balance must be achieved in pleasing those customers/advocates that have helped build the brand, whilst also making the brand appeal to a wider audience and generating new streams of income and profit"*

> DST2: *"I think we are seeing examples where the brand is not created then sold - but that the brand is created and owned by the consumers themselves"*

Furthermore, brands and their management are bounded by a cultural context, space and time. Their continued existence necessitates two-way influence, which signals a diffusion of management responsibilities.

> DST2: *"A brand is ultimately created in a specific consumer and cultural context. All successful brands need to keep up with the times and remain relevant to their consumer base as they grow older or younger or shift geographies. In general for a successful brand, it is a two way street of brand influencing consumer and vice versa"*

Online and social media are seen as being factors, which are increasing the importance of the role of a consumer – both as managers and influencers:

> DST2: *"In recent times though the evolution of digitally marketed brands and the huge and increasing influence of social marketing has lead to the creation of 'consumer citizen brands' or brands which represent a consumer movement"*

These observations lead the Delphi panel to argue that current and traditional techniques or ways of thinking may in fact have gaps.

> DST2: *"Whilst the top down approach is in vogue, with brand managers shaping the agenda – it can be argued that this is disastrous. Because, in the absence of wider stakeholder consultation, there remains the potential for serious errors of judgment. Furthermore, brand managers do not have control over the uninformed Brand image and can only focus in the main on the informed brand image"*

From the literature review, findings suggested a paucity of brand stakeholder analysis, in a way that encapsulated those observations of the Delphi panel. In remedy to gaps in literature, the researcher as a focal theory offered the brand stakeholder model - and it would appear that it resonates with the research findings. However, it is conceded that the Delphi panel were not given the opportunity to comment on this model. It would therefore be of interest in future studies to present the model as a starting point for discussion amongst a select panel of experts. At this stage though, it would appear that the theoretical model follows the data collected within this Delphi study:

> DST2: *"As for a definitive framework and observation, both consumer and stakeholder influence is necessary. It is a process of osmosis and also how the brand portfolio fits together. It is up to the brand manager to juggle the brand's core purpose with the influences of the consumers and the stakeholders"*

The word 'juggle' is an interesting one, as it suggests:

- Task complexity
- Skills and dexterity
- Brand managers can be orchestrators
- Dynamic space and time

The word 'osmosis' also signals:

- Concepts of mediated equilibrium
- Biological function and metaphor
- Two-way communication and engagement
- Permeable barriers
- Diffusion

In support of the idea that brand managers can remain central, if they can fulfil the necessary application of: tools, skills, understanding, terms of engagement, and strategic messaging:

> DST2: *"Obviously though, several companies have the ability to follow the resource-based view to great effect (the company managers determining the agenda) – e.g. Apple and Bang & Olufsen, who are not involving the consumers in focus group discussion etc., simply because traditional consumers cannot imagine what would be future brand successes. However, most companies enjoy their brand successes by involving the customer segments (the market-based view)"*

This comment suggests that leadership through demonstrable visionary knowledge, can protect brand managers from having to give up control. Also, the examples given are from the technology sector and the researcher considers whether technological innovation is also a key factor. Furthermore, both of these brands are aspirational, emotional and embody brand design *chic* – for which they charge a premium. When looking at the final sentence, a polemical argument could be made which considers if most companies are involving consumer segments because:

- They have to
- Consumers want this
- It offers gains
- It is the current school of thought and therefore accepted as a truism

However, further research could be undertaken to establish whether there remain better methods and approaches, than are current executed. For: if brand managers are informed guardians and engaged experts, should it not also follow that they guide and parent other stakeholders, despite their potentially capricious behaviours – ranging from the damaging and unsettling, to the nurturing and well meaning.

Therefore a preliminary finding argues that, where possible, brands outside of the technology sector should look to find ways where they can deliver technological innovation – with aspirational, emotional and brand design *chic.* For example, this could even be achieved by low-involvement brands - through augmented features and services, like smartphone Apps. Overall, with emotion, these also support the reoccurring conceptual argument for humanising commodities.

Staying with the topic of emotion, panellists offered a suggestion as to why and how emotion links with brand understanding. Examining the word *'love'* was considered to be a good starting point:

> DST2: *"An interesting way of looking at a brand is in the 'Lovemarks' way... Love by definition is about reciprocity. Therefore, brands with a two-way communication with the consumer, is a loved brand. They are stronger brands"*

At this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Brand management needs to be derived from an acceptance of consumer perspectives and roles
- In practice, brand managers are experiencing a phenomenon of management becoming a diffused function: resulting from necessary stakeholder engagement; and self-defined stakeholder power, legitimacy and control
- Online and social media are affecting the way in which brand management can be achieved, Furthermore, they are most significantly driving the diffusion of brand management and culture - as democratised collective pursuits
- Brand mangers like brands need to draw from all facets of human communication channels and social networks – and especially those that evoke and connect with emotions
- Brands, brand managers and consumers are active participants in a cultural stakeholder context, space and time

6.4.2.2.1 Consumer-Brand Manager interplay: open coding

OC2.2.1a: WHAT IS?	Top-down resource-based view. Bottom-up market-based view. Image management. Dialogue. Brand building. Control. Consumer influenced. Organic.
OC2.2.1b: WHAT HAS?	Potential for errors in judgement. Orthodoxy. Heterodoxy. Cultural context. Balance. Reciprocity. Integrity.
OC2.2.1c: WHAT HAS TO BE?	Wider stakeholder consultation. Societal goodwill. Environmental impact. Transparent. Nuanced. Ethological. Psychological.

	Strategic.
OC2.2.2: WHO?	Brand managers. Consumers. Stakeholders. Brand portfolio. Supporters.
OC2.2.3: HOW?	Two-way. Size-dependent. Osmosis. Conversation.
OC2.2.4: WHEN? HOW LONG? WHERE?	Specific. Cultural context. Age dependent. Geographic. Long-term. Dependent on industry sector.
OC2.2.5: HOW MUCH? HOW STRONG?	Dependent on industry sector.
OC2.2.6: WHY?	Consumer ownership. Strategic view. Brand size. Brand strength.
OC2.2.7a: WHAT FOR, MARKETER?	Control. Influence. Empowerment. Please consumers.
OC2.2.7b: WHAT FOR, CONSUMER?	Indicator for switching. Judgement. Empowerment. Natural behaviour.
OC2.2.8: BY WHICH?	Nuanced ethological and psychological measures. Evaluating societal goodwill, environmental impact, and transparency. Framework of consumer and stakeholder influence. Social media. Digital.

Table 27 Consumer-Brand Manager interplay - open codes

Figure 33 Consumer-Brand Manager interplay - open codes as a Word Cloud

Keywords	Ancillary words
View	Top-down resource-based view
Empowerment	Bottom-up market-based view
Cultural	Image management
Stakeholder	Dialogue
Strategic	Brand building
Nuanced	Consumer influenced
Control	Organic
Influence	Osmosis
Impact	Natural behaviour
Goodwill	Potential for errors
Dependent	Orthodoxy
Industry context	Heterodoxy
Societal	Reciprocity
Two-way	Integrity
	Ethological
	Psychological
	Supporters
	Size-dependent
	Age dependent
	Geographic
	Long-term
	Indicator for switching
	Digital
	Social media
	Transparency

Table 28 Consumer-Brand Manager interplay - keywords and ancillary words derived from Word Cloud

6.4.2.2.2 Intermediate coding axial analysis discussions

Consumer-brand manager interplay is a nuanced, organic, inter-dependent, two-way cultural paradigm. Stakeholders converge with the aim of seeking empowerment, through (ideally) good-natured control, influence and impact.

This is achieved through consumer-influenced dialogue, which has to accommodate and ultimately aspire towards achieving natural societal behaviour. As a result, such relations have a great potential for errors and have to stand the test of different time and situation-based perspectives. The quest for mediated control may yield orthodoxies or heterodoxies, which then may alienate supporters. Furthermore, digital and social media has the effect of: increased messaging, speed of messaging and message permanence. These then may contribute towards subsequently different interpretations and switching behaviours, which in turn also drives relationship dynamism.

6.4.3 Theme Three: Making sense of culture and the interplay with branding

Questions:

Herskovits (1948) is of the view that culture "is the man-made part of the environment". Smith and Bond (1998) explain that this includes both material objects and social institutions. However, they suggest that it does not help us decide what conceptual units allow us to make cross-cultural comparisons.

7. *What would you add and/or amend about this definition. Also what would you use to compare and contrast cultures and how do you do this?*
8. *It is considered that there exists a relationship between Brands and Culture. How would define this relationship; and do brands govern culture, or do cultures govern brands? What encourages an awareness of brands and culture, and an appetite for both of these?*
9. *What do you understand by terms such as Brand Surrogacy, Cultural-hybridisation and Ethnocentricity, which observe shifting patterns in thought, emotions and behaviour? How do these phenomena affect brands?*

6.4.3.1 Defining, making sense of and interpreting culture: key findings

The answers in this theme indicated that panellists found it more difficult to arrive at one coherent definition for culture, in comparison to the previous sections concerning: brands, branding, brand evaluations, brand calculations, brand relations, and brand management. This was of little surprise to the researcher, as literature reviews highlighted the volume of existing culture definitions. Mirroring the concerns and suggestions of the researcher, it appears

that panellists were more interested in the usage and application of cultural understanding.

> DST3: *"In business we usually use 'culture' in two main contexts, Organisation Culture and National Culture. In OC, I would define culture using learnt behaviour as an example; but for NC I would argue that it has more to do with acceptance and tradition"*

> DST3: *"It is impossible to truly compare one culture against another for several reasons"*

> DST3: *"However, there are many words that have been used to explain the term 'culture' in this context including values, beliefs, norms, attitudes, and aspirations"*

> DST3: *"Relationship patterns and informal power structures that exist in societies I believe are the most important aspect of cultures that would allow us to make cross-cultural comparisons. This would include familial structures and hierarchies, relationship between genders, power structures in a business or political set up, social stratification systems e.g. caste systems, authoritative figures (institutional and familial) etc."*

These statements are indicative of the fact that the term *culture* can exist in the plural and each culture can be separated - having homogenous boundaries. However, having established this construct, it appears to offer practical challenges. Defining and classifying usually leads to the desire to cross-compare and rank, which it is argued here is problematic. Cross-comparisons and rankings usually signal attempts at generalisations and creating universal meanings. Therefore, if they are to work, it follows that they are either macro and generalist, or mirco and specific. Specificity is preferable and is likely to deliver more depth, but it may render observations of limited use outside of context, location and social groups. Whilst difficult, the panel do assert that comparisons occur, but they appear to be more subjective, informal and in themselves 'cultural':

> DST3: *"A comparison of cultures can never be anything but subjective as one is a product of their own environment, as such one uses their own cultural experiences to compare and contrast other cultures, which is the only way you can truly notice and appreciate the differences"*

> DST3: *"For instance, if you compare the teenage population around the world for music culture, there were maybe uniformity in preferences but if you compare above 50 populations, they would show huge variations"*

> DST3: *"Similarly, you could find similarities in consumption patterns of emerging markets although the external manifestations like the final cooked food and way of dressing may differ"*

Therefore, it is likely that cultural comparisons will be of use to others, if those others are part of the same group, or they understand and accept the lens of that group. These observations mirror anthropological and consumption based cultural schools of thought. Furthermore, they support the findings of the researcher's published Delphi Study on Hip hop culture, as a case study for a postmodern marketing cultural phenomenon.

In-keeping with the marketing perspective of the commoditisation of objects, activities and societal interactions:

> DST3: *"I am inclined to take the view that 'culture' is both 'process' and 'product' orientated. Process as how we do things and product as the outcome of what we do"*

The words *'process'* and *'product'* are central terms to marketing and business and management approaches of understanding.

As a way of harmonising differing perspectives and definitions, panellists felt that whilst it is clear that culture has a meaning and existence, it has to be investigated as linked to a context, if it is to deliver understanding and therefore a commercial use:

> DST3: *"the term 'culture' needs to be set in the context of one's work. The term 'culture' has different meanings in different settings..."*

When considering the definitions offered by the researcher as a starting point for discussion, panellists' views indicate that these definitions fall short and have gaps:

> DST3: *"Therefore I am not sure if I agree with Herskovits' definition as it is taking a 'physical' view of what culture means. Smith and Bonds explanation only seems to indicate that there is more to just a physical state but it may also include a non-physical (touchable) state"*

This is perhaps because the definitions have been offered without a context, as has been argued. Nevertheless, the definitions do provide general guiding principles:

> DST3: *"I would agree that culture is the man made part of the environment and a part that is constantly evolving and organic"*

The words *'evolution'* and *'organic'* support the researcher's thesis that culture is linked to time, changes and has biological traits.

As the Delphi panel hails from marketing, business and management backgrounds, it follows that most of their frame of references hail from this field. As a result, established business and management frameworks from Hofstede were familiar and used, albeit with caveats.

> DST3: *"I think that as my first encounters with the meaning of culture was about organisations and business, I am inclined to take a view influenced by Hofstede. Hofstede's cultural dimensions are probably the least contentious and could be extended to brand work"*

> DST3: *"However this is still very difficult ground. I agree that Hofstede is the least contentious but he is still very contentious and especially so in the way he defines his dimensions, which could be interpreted differently. Asians are supposed to be collective but in many ways are also individualistic – his definitions do not properly capture this quicksilver type changeability etc…"*

For the panel therefore it appears that their formal study of culture has occurred in connection with business, which supports the thesis that culture is a key component of branding. However, panellists are aware of the fact that their academic and professional cultural frameworks have gaps in not reflecting what they hold to be the reality of culture, according to their personal observations and experiences. In addition, literature discussions also considered how published cultural studies have yielded differing results and conclusions, especially in Asia. Panellists seemed to support the view that this could be due to the fact that many cultural studies and theories as they see them are 'Eurocentric', which may render them ill-equipped in being able to capture understandings of Eastern cultures. This too was an area of discussion in the literature review. Therefore, there remains a research imperative to explore this area further, in order to preserve cultural branding as a relevant applied science, to varied cultural groups and contexts.

Furthermore, metaphor *'quicksilver'* is a vivid one – as it denotes:
- Dynamic 'liquid' changeability, with a surface tension that allows it to exist in small spheres, or equally able to fuse into one large whole
- An ability to fit into different vessels - which here is synonymous with fitting into theoretical frameworks, markets, locations, groups, and mental and emotional sates
- The linkage with mythology and linguistics - as quicksilver shares its meaning with mercury. Mercury is not only a chemical element, but it is also the name of Mercury, the Roman god of eloquence, skill, trading and thieving
- An appearance of natural shiny beauty

And therefore, its descriptor as an attribute of culture in turn gifts culture allegorical meanings.

Having considered and reflected upon the challenges of definitions, interpretations, and the practical usage of cultural conceptual frameworks for deriving erudition, the panel began to summarise their thoughts:

> DST3: *"culture is the system of shared beliefs, values, customs, behaviours, and artefacts that the members of society use to cope with their world and with one another, and that are transmitted from generation to generation through learning"*

> DST3: *"Cultures are rapidly evolving and picking up norms of the other. In this era of convergence, we have to break free of traditional stereotypes. If cultures have to be compared and contrasted, they would have to be situation based"*

> DST3: *"Societal mythologies are a crucial lens or context in which to understand these relationships. As they provide the historical wiring that makes people behave the way they do"*

From these, the indicators are that culture and cultures are changing exponentially, which challenges existing definitions and traditions. Signals that change is rapid and about establishing control come from the word *'cope'*. For coping is a pragmatic approach in the face of complexity and difficulties. There appears to be a risk that cultural views and investigations may lead to stereotyping – a term that carries negative connotations. However, from a branding perspective, it is argued that stereotyping nay not be a negative pursuit. In marketing, segmentation analysis stereotypes – but good stereotyping is more conventionally termed sufficient and identified homogeneity, of strategic value. Understanding culture is seen to be the culmination of a process of iterative education and learning, which has to happen over time. Furthermore, in this pursuit individuals and collectives have to balance orthodoxy and heterodoxy, by being able to *'break free'*. Interestingly also, the word *'artefacts'* appears, which has been identified as a supportive term from the cultural school of branding to describe the nature of a brand.

When attempting to provide means and methods by which culture can understood, panellists provided a long list of clues and cues. These ranged from, conspicuous culture, language, food, rituals, fashion, religion, literature and art, amongst others. Therefore, it appears that making sense of culture necessitates

the study of a menu of cultural ingredients. Panellists introduced the term *'human equation'* to provide a conceptual framework and method of calculating culture - towards units that could offer means of cultural comparison.

At this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Defining culture and making comparisons is highly subjective and problematic
- Culture is linked to a human context of social networks, which points towards broad and narrow views of stakeholder analysis holding value
- In practice, individuals and groups are experiencing a phenomenon of culture becoming a diffused function of society and business: resulting from self-defined power, legitimacy and control
- Business professionals need to draw from all facets of human communication channels and social networks – and especially those that evoke and connect with emotions
- Culture engages active participants and their associated objects and practices in a cultural 'stakeholder' context, space and time. This can be seen as a product and a process
- Human equations provide the strongest conceptual units to make cultural comparisons.

6.4.3.1.1 Defining, making sense of and interpreting culture: open coding

OC3.1.1a: WHAT IS?	Complicated. Impossible to compare completely. Contentious. Learned behaviour. Acceptance and tradition. Process. Product. Non-physical. Organic. Created by humans. Subjective. Non-material. Material. Individualistic. Collectivist. Shared. System. Transmitted. Sum forms or art, love and thought. Informal.
OC3.1.1b: WHAT HAS?	Different meanings in different settings. Values. Norms. Beliefs. Attitudes. Customs. Artefacts. Aspirations. Symbolism.

	Dimensions. Structure. Attributes. Leadership. Quicksilver. Relationships. Power. Mythologies. History. Heritage. Patterns.
OC3.1.1c: WHAT HAS TO BE?	Evolutionary. Motivational. Relational. Accommodating. Progressive.
OC3.1.2: WHO?	Business. Society members. Political affiliates.
OC3.1.3: HOW?	Leadership. Motivation. Structure. Organisation. Emancipation.
OC3.1.4: WHEN? HOW LONG? WHERE?	Context of work. Context of society. World-view. Constant evolution. Environment. Generational.
OC3.1.5: HOW MUCH? HOW STRONG?	Context dependent. Pervasive. Collective decision. Independent decision.
OC3.1.6: WHY?	Human trait. Branding strategy. Management process. Means of communication. Relationship approach.
OC3.1.7: WHAT FOR?	Socialisation. World-view. Decision-making. Affiliations. Communicating meaning. Understanding reality. Coping with reality.
OC3.1.8: BY WHICH?	Process – how things are done. Product – output and outcomes of a process. Cultural lag. Cross-comparisons. Non-material. Material. Language. Faith. Arts. Fashion. Food. Ethnocentrism. Relationships.

Table 29 Defining, making sense and interpreting culture - open codes

Figure 34 Defining, making sense and interpreting culture – open codes as a Word Cloud

Keywords	Ancillary words
Context	Complicated
Process	Contentious
Leadership	Learned
World-view	Behaviour
Product	Acceptance
Material	Tradition
Non-material	Non-physical
Relationships	Organic
Reality	Created
Structure	Humans
Decision	Subjective
	Individualistic
	Collectivist
	Shared
	System
	Transmitted
	Arts
	Love
	Thought
	Informal
	Values
	Norms
	Beliefs
	Attitudes
	Customs
	Artefact
	Aspirations
	Symbolism
	Dimensions
	Attributes
	Quicksilver
	Power
	Mythologies
	History
	Heritage
	Patterns
	Evolutionary
	Motivational
	Accommodating
	Progressive
	Emancipation
	Environment
	Generational

	Communications Meaning Understanding Coping Language Fashion Food Ethnocentrism

Table 30 Defining, interpreting and making sense of culture - keywords and ancillary words derived from Word Cloud

6.4.3.1.2 Intermediate coding axial analysis results

Interestingly, whilst panellists consider business and management interpretations of culture, they hold wider interpretations of culture to be of more significance when understanding human relations in business, management, branding and society. This is perhaps due to the ethnic diversity, associated social networks and extensive international travel that the panellists have undertaken. Furthermore, as there is a strong global element to the Delphi study, panellists may have been guided towards a top-down, bottom-up approach.

Culture was held to be a retro and future-spective world-view of material and non-material relationships, which transmit the collaborative, albeit complicated, human existence of individuals and collectives. Having a cultural perspective draws non-physical elements into a system of structured reality, which results in the creation of emotional and emotive products and artefacts (conceptual and physical) that transfer deep-structured meanings to reality. Strong culture governs and unifies active participants' norms, values, beliefs and attitudes – rendering them cultural agents. Whilst being rooted in heritage, history, language, mythologies, food and fashion, amongst other elements; culture is a dynamic, pervasive quicksilver, which changes to fit the context. This means that cross-cultural comparisons remain complicated and contentious. Therefore, what appears to be more important is the vehicle and process of accommodative learning, which culture encourages in those who ascribe to that particular cultural frame of reference. When successfully understood and adopted, culture lays out patterns of behaviour, which can motivate and drive leadership.

6.4.3.2 Relationship between Brands and Culture: key findings

In this section, questions 8 and 9 have been analysed together, in order to consider both the relationship between brands and culture and to sense the applicability of emerging terms offered from the researcher's focal theory.

Perhaps due to the laddered nature of the Delphi questions; or maybe due to the complexity of the question; or even because the Delphi panel had become more skilled at articulating views: Theme Three yielded the longest units of data. Paragraphs were longer and opinions were articulated in rhetorical narratives. This meant that is was more difficult to separate quotes into smaller units, for risk that meanings would be curtailed if attempted. However, the strength of the data in this section was that individual responses required less editing by the researcher and fitted together better, with a higher degree of *In vivo* preservation. This safeguarded against potential researcher bias. Furthermore, it signals a positive outcome, in that the primary aim of the doctoral study sought to investigate the phenomenon contained within this theme.

A key reference point was found to be the concept that a brand is not simply cultural, or part of a culture - but rather brands are a culture in themselves:

> DST3: *"A brand is best thought of as a culture – and there is an interaction both ways"*

In tandem, if a more conventional position is adopted, which follows findings derived from the background theory, then culture and brands share a commonality in being maintained through shared storytelling. However, the longer a story exists and the more it is shared, then there may be differences in interpretation and understanding – ranging from the traditional to the progressive:

> DST3: *"Culture is a story that we all accept. Not always true as culture evolves as people add elements to suit themselves. This is why we have many cultures with sub groups that claim to be taking the culture back to its roots i.e. Fundamentalists believe they have the one true brand/culture and that people have muddied the waters over the years"*
>
> DST3: *"A brand is created within a cultural context and in seeking to be continually relevant borrows from its cultural context in the stories, symbols and rituals it creates and perpetrates. A very strong cultural association for a brand to adopt which would be meaningless out of its cultural context"*

DST3: *"When an artist or a writer depicted culture, he used brands of the time to do so. And that has got engraved in history. That's the relationship that brands and culture share. Brands are a very integral part of the definition of culture and description of an individual's life. Brands and culture influence each other"*

DST3: *"Brands will always be accepted anywhere as long as owners are honest and offer value"*

When focussing on the most recent phenomenon of the increasing significance, importance and conspicuousness of brands, for both brand managers and consumers, it is clear that technological advances and urban living are supporting this:

DST3: *"The distinction of urbanism from urbanization shall throw light to the relationship of brand and culture. Urbanization increases the use of brands and urbanism is a way of life determined mostly by brands"*

DST3: *"The mistake many people make is that they believe a brand is made up from advertising. This was true in the old world. But in the new world, where there are a million different ways to experience and influence the behaviour of a brand"*

So great is the brand consumption phenomenon, that strong global and local brands both appear to be redefining cultural understanding and practices:

DST3: *"Brand behaviour is influenced by the culture of the consumers they court, at least initially... for most brands this stays the case at least to start with but there are clearly some brands which have transcended that and are now style-makers in their own right. Very few brands <u>govern</u> culture - that's a big word"*

DST3: *"...this is a very complex issue. Most brands are a product of their culture, whether that is organisational culture (such as Apple, which has a culture of creativity and innovation), or their wider cultural environment, i.e. the country or continent in which they operate it. Truly successful global brands to some extent transcend this or it defines them and becomes part of their attraction... As such some brands become more attractive because of their cultural connotations. On the flip side brands can influence culture and cultural trends, this is best exemplified through music or social media brands such as Facebook and Twitter. However, not all brands aim to expand into the global market, because 'they' may decide to remain in a micro market – in order to enjoy 'longevity'. An example of this can be seen with Japanese local rice wine, which could lose its authenticity when it is mass-produced"*

DST3: *"Brands can also hijack a culture to the extent that 'Hello Kitty' is the national symbol of Japan and the perception of 'Superdry' clothing being actually from Japan, when its more correctly a brand created by Essex man"*

At the zenith of the humanised brand phenomenon, branded humans are embodiments of integrated cultural and brand interpretation, application and subsequent adoption:

> DST3: *"Quite often though brands can also drive and define culture. Celebrities are perhaps the best example of brands with have the power to set cultural trends"*

These comments indicate that the panellists concur with the researcher's thesis. Key identified terms and trends of the focal theory are encapsulated in these paragraphs. Furthermore, the decision to gather qualitative and quantitative biographical data according to organisation, brand, country appears to be supported as being of value when looking to understand the phenomenon.

When examining responses to the new terms introduced in the focal theory chapter, Delphi panellists suggest that the enigma and rate-determining step in this phenomenon lies in understanding the human. It is argued that this applies to actual humans and brands as allegorical humans or humanoids - who are human-like:

> DST3: *"People are more complicated to define, due to some of the observations listed, which I am assuming these terms are looking to encapsulate, define and clarify"*

As an early indicator of the worth and contributions to new knowledge presented in this doctoral study, panelists expressed personal views related to the focal theory and thesis:

> DST3: *"Overall in this section, the comments on brand surrogacy, cultural hybridization and ethnocentricity are the most interesting sections of the three themes"*

This interest can also be interpreted as panellists' feelings that the data and judgements share closer links to the real world - in comparison to previous extant literature. Despite no definitions and descriptions being offered by the researcher for these terms, panellists were seen to understand their meaning in a similar way to that of the researcher, which bodes well for a focal theory. Furthermore they added additional descriptions and examples under each, which were used to refine thought presented in the next chapter.

At this stage, findings indicate that the following observations mirror points raised when identifying gaps in literature and presenting a focal theory conceptual framework:

- Whilst there is seen to be an established link between culture and brands: making comparisons; unravelling and understanding links, causalities and hierarchies is complex and highly contextual
- Culture and brands are linked to human social networks, which points towards broad and narrow views of stakeholder analysis holding value
- In practice, individuals and groups are experiencing a phenomenon of culture and branding becoming a diffused function of society and more overtly linked
- This is a paradigm which especially evokes and connects emotions
- This can be seen as a product and a process with a context, space and time
- Human, branded human and human-like brand equations provide the strongest conceptual units to make comparisons and to derive understanding

6.4.3.2.1 Relationship between Brands and Culture: open codes

OC3.2.1a: WHAT IS?	Complex. Product. Organic. Collaboration. Relationship. Story. Phenomenon. Fickle.
OC3.2.1b: WHAT HAS?	Creativity. Innovation. Stories. Symbols. Rituals. National identities. History.
OC3.2.1c: WHAT HAS TO BE?	Relevant. Metaphor. Nurtured.
OC3.2.2: WHO?	Brands. Celebrities. Consumers. Society. Organisations. Stakeholders.
OC3.2.3: HOW?	Cultural context. Urbanism. Urbanization. Hijacking. Flexibility.
OC3.2.4: WHEN? HOW LONG? WHERE?	Cultural context. Changes. Global. Micro. Local. Market. Transcendence.

OC3.2.5: HOW MUCH? HOW STRONG?	Culture defines a brand. Culture determines a brand. Brands can drive and define Culture. Few Brands govern Culture. Most Brands are a product of Culture.
OC3.2.6: WHY?	Modern world-view. Switching behaviour. Complicated human existence.
OC3.2.7a: WHAT FOR?	Explanation of modern human existence. Meaning. Communication. Dominance. Power.
OC3.2.8: BY WHICH?	Nationalism. Ethnocentrism. Relationships. Urbanism. Urbanization.

Table 31 Relationship between Brands and Culture - open codes

Figure 35 Relationship between Brands and Culture – open codes as a word cloud

Keywords	Ancillary words
Culture Brands Urbanism Urbanization Human Existence Context	Complex Product Organic Collaboration Relationship Story Phenomenon Fickle Creativity Innovation Stories Symbols Rituals National Identities History Relevant Metaphor Nurtured

	Celebrities
	Consumers
	Society
	Organisations
	Stakeholders
	Hijacking
	Flexibility
	Global
	Micro
	Local
	Market
	Transcendence
	Modern
	World-view
	Meaning
	Communication
	Dominance
	Power
	Relationships
	Ethnocentrism

Table 32 Relationship between Brands and Culture - keywords and ancillary words derived from Word Cloud

6.4.3.2.2 Intermediate coding axial analysis

Panellists expressed that this was the most interesting section of the Delphi study. From this section, it became clear that brands and culture do share a relationship and co-dependency. In addition, the cultural approach to branding and the brand approach to understanding culture, appear to be the most contemporary and arguably best ways to understand both independently.

From this, it was suggested that:

- Culture defines brands
- Culture determines who, where, when, why and how a brand exists
- Brands can drive and define Culture reciprocally
- However, few brands govern culture
- And as such, most brands are a product of culture.

Several named examples were given to illustrate the complexity of this phenomenon and how they reflected the comparable complexities of human interactions. Furthermore, this identified phenomenon was seen to be on the rise - as it is strongly linked with modern-day urbanism and urbanization. In addition, the urban experience brings with it the significance of brands, as indicators of a variety of factors, ranging from: national identity; mediating global and local views; rituals; relationships; consumption; modern day history; and power.

Playing an active part in such a dynamic and rich organic societal construct necessitates the ability to communicate in a way that blends the modern with the

old - through story telling and metaphor. If successful, transcendence can be achieved and potentially opportunities to hijack existing behavioural patterns, in a manner that can support market innovation and competitive dominance.

6.5 Three themes combined

The following section considers all of the three themes collectively, in the interests of moving analysis toward one identified phenomenon. Figures 36 and 37 are representative of the sum total of all of the keywords previously presented.

Figure 36 Word Cloud derived from keywords generated from Delphi responses

Figure 37 Word Cloud derived from total words generated from Delphi responses

Whist power and attributable value are the end-game for brands, these are not entirely in the hands of brand managers. Furthermore, power and value are highly subjective and dependent on the perspective and needs of the stakeholder. Modern-day brand existence is a collaborative process of understanding, strongly governed by consumer-led stakeholders. This paradigm relies upon the management of reciprocal images, which are emotional, creative, ethnocentric and ultimately human. Furthermore, being able to appraise and appreciate the significance of context and varying perspectives is a critical success factor.

Culture is complicated. Definitions seeking to provide a definitive answer and explanation as to what culture is, what it means, and how it can affect brands universally are contentious – as comparing cultures completely, is judged to be impossible. However, understanding culture and making sense of it, if: considered within a context, from several perspectives, and within timeframe; is possible. Notwithstanding the fact that culture may mean different things to different people, or in different contexts: each interpretation of culture appears to have a bearing on brands and brand management. From this it has been suggested that:

- Culture defines brands
- Culture determines who, where, when, why and how a brand exists
- Brands can drive and define Culture reciprocally
- However, few brands govern culture.
- And as such, most brands are a product of culture.

This identified phenomenon argues for a world-view of humans and society, judged by local and cross-cultural interactions, which can be evaluated, and in some cases calculated, for demonstrable consumer and market gains. Furthermore, cross-culturalism means that terms such as national, political and ethnic identity are understood and used in a different way, which extends their scope, relevance and impact.

Successful and meaningful participation in such an environment requires intuitive, strategic, motivational and creative leadership, which is interpreted according to tangible and intangible scales. Emotive product offerings are the legacy of such endeavours.

With the advent of social media and intense emotive and interconnected relationships: exemplars of goodwill have to be demonstrated and proved in the short and long-term – meaning that transparency is paramount.

Finally, whilst brand management by brand managers is essential, in reality if brand managers are to maintain participatory control in this process, they face great challenges. These necessitate that they have sufficient qualities and experience, which push them towards a high degree of peer-support, cultural exposure and broad-based knowledge, outside of marketing. Ultimately, this means that brand managers have to be brand leaders.

6.6 Reflective observations on Delphi study

The Delphi study lasted 16 months in total, from when the first biographical questionnaires were sent out, to the last returned vote. This was 4 months longer that forecast in the methodology section. Whilst Delbecq et al (1975), Ulschak (1983), and Ludwig (1994) [in: Hsu and Sanford, 2007] recommend a minimum of 45 days for the administration of a Delphi study, with Delbecq et al (1975) suggesting a time of two weeks in between rounds; it was felt that whilst the minimum would be achieved, the actual length would far exceed that. Therefore, such guidance offered little realism in this instance due to:

- The depth of this study
- Initial discussions with panellists suggested that a longer time-frame was needed in order to fit in with their work commitments
- Upon seeing the first questions, Delphi participants expressed the need for sufficient time to meditate on the questions being raised, in order to do them justice and to take full advantage of the individual's experience
- The fact that Delphi experts hailed from several organisations across the globe, was held to impact on the time taken to gather data
- The researcher was not a colleague of any of the panellists and so opportunities to motivate and chase participants face to face, or on site were few and far between. Email was the main mode of communication and whilst in some cases it received a quick response, often this was a holding email.
- The fact that often in shorter-length Delphi studies questions are shorter and closed; participants share greater homogeneity, in being from the same organisation; and the researcher is involved in an 'official' or professional capacity

As a doctoral student, the psychological and contractual bonds are much weaker with respondents. And reading between the lines, when examining correspondence with the panel, whilst good-natured and enthusiastic, it appeared that the pull to answer the Delphi responses, always took a back seat for them. This is not to say that participants were not committed, or did not see a value in being involved. Often they were apologetic and expressed guilt at having not responded sooner. Also, they affirmed how keen they were to play a vital and active part in the study. The volume and richness of the responses from each participant stands testament to this fact.

Beyond this panellists expressed how fascinating and liberating the experience was. They stated that the Delphi process, responses and responding gave them an opportunity to reflect upon their own work practices and academic development. Some even suggested that the content in the Delphi study could make for the foundations for a book, which would deliver a needed fresh and contemporary approach to branding. It could be argued that this may have been vanity or nepotism on their part, in wanting to see their views in print and on the bookshelf. However in response, some panellists helped to arrange invitations for the researcher to present preliminary findings at practitioner and academic events – which are an indication of their feelings that practical and applied knowledge had been created that should be shared amongst peers.

Views by the panellists demonstrated a strong command of English and an ability to articulate detailed conceptual arguments, with supporting practical examples. This was something that the researcher had hoped for and expected – and so to this end, this was a relief. Panellists expressed strong views of definitions having a shelf-life and in some cases being an over simplification. Instead, their responses followed the structure of non-prescriptive definitions, based on narratives, allegories, analogies and metaphors, which they argued were of more value and accurate in preserving the complexity of reality. In support of these narratives it appeared that their opinions embodied more Socratic methods of philosophical questioning and answering. On several occasions, questions were answered by questions and qualifying answers; or additional definitions were provided and subsequently refuted or refined.

In the same vein, the volume and richness of biographical data exceeded the researchers' initial observations. Participants demonstrated a greater spread of brand and ethnocentric cultural experiences. Furthermore, they were literate in more languages and had travelled more extensively than the researcher had been aware of. By the researcher not imposing categories, participants took this opportunity to provide further information. Therefore, the biographical data provided a compelling argument for the significance of the opinions given by the panel and that they had the potential for wider generalisations and applicability. It could be argued that there are risks in such an approach, as elements of control are handed over to respondents. However in this study, this was intended – as the respondents are experts in their fields and in some cases their experience exceeds that of the researched. In addition, as a collective based on an iterative experience, this cumulative experience was strengthened further and offered a cleansing mechanism for removing gaps in data.

With the Delphi study running over such a long period, the advantage was that the researcher was able to immerse himself in the data, at each stage over time - allowing for greater levels of reflective iteration and hermeneutic analysis. Memoing and diagram making was central to this process of analysis. The researcher generated a significant number of notes and perceptual maps when trying to make sense of the data - pulling it apart and putting it back together; in order to create a more reductive and structured explanation of the phenomenon. This process was assisted by the researcher attending conferences and events presenting findings; engaging in informal discussions with peers; and initiating discussions during his course delivery of a Strategic Brand Management module to 3 undergraduate and 3 postgraduate cohorts.

6.7 Conclusions

In this chapter, the final round Delphi responses were presented, analysed and discussed. Open coding and axial coding techniques were applied and supported by word-cloud software and memoing techniques. Intermediate coding analysis delivered structured narratives for each of the three themes and collectively under one observed phenomenon. Key conclusions presented in this chapter are:

- Whilst more intensive and time consuming than had been initially thought, the Delphi study achieved its objectives - in delivering detailed opinions addressing the research question
- Panellists saw value in the Delphi study and enjoyed participating, despite it also engaging them to a greater degree than they had envisaged
- Hard and literal definitions are judged to be problematic in a dynamic environment, where context determines their efficacy and relevance
- Non-prescriptive definitions, based on narratives, allegories, analogies and metaphors are of more value and accurate in preserving the complexity of reality
- In support of these narratives more Socratic methods of philosophical questioning and answering, can stimulate thinking and guide future actions
- Quantitative calculation methods need to accommodate both tangible and intangible factors, which renders them subjective and time-specific
- Branding and Culture do share a strong interdependent relationship with each other, which also suggests that cultural branding approaches have distinct merits and can deliver critical success
- Managing such a landscape is taxing and requires exemplary professionals, with considerable experience and leadership qualities
- Wider perspectives of stakeholder significance are vital. Furthermore, these necessitate collaborative and empathic strategic approaches

The next chapter considers the identified phenomenon, as observed by the expert Delphi panellists, and examines what relationship it shares with the focal theory presented by the researcher previously.

Chapter Seven: Brand-Culture Stakeholder phenomenon – Theory Grounded

Triangulating findings of the Delphi study, the research questions and conceptual focal theory framework – Critical discussions of the thesis

Chapter 7: Brand-Culture Stakeholder phenomenon – Theory Grounded

7.1 Introduction

This chapter brings together the Delphi study results, findings and discussions presented in Chapter 6 and the core conceptual frameworks presented as a focal theory in Chapter 3. The purpose of which is to test the focal theory and address the identified gaps unearthed from background theory. Collectively, these are used to refine and present a thesis, which offers a contribution to knowledge through a new grounded theoretical framework and a response to the call to provide erudition to an identified area necessitating research.

As data analysis and discussions have already been attempted and presented next to the respective data in Chapters 5 and 6: Chapter 7 presents a more focussed and further distilled critical appraisal of preliminary conclusions – which maps to the research questions and focal theory. In contrast to quantitative studies, which present data, and then analyse and discuss critically in a subsequent chapter: this thesis adopts a funnelling approach, where data analysis commenced previously in Chapters 5 and 6. To this end, data analysis is a diffused and hermeneutical cycle of discovering, which grounds theory within background theory and empirical data collected. With this in mind, Chapter 7 is designed to demonstrate clarity of thinking and conceptual argument – based upon an arrival at data saturation and a clear emergent pattern, which then governs how one coherent phenomenon then shapes one grounded theory. Therefore, this chapter is governed by the pull to assert an arrived at judgement on a phenomenon; which inductively moves beyond a preference for dogmatically mapping-back findings to background theory, in the form of a treatise. The reason being that through the chosen grounded method, the hermeneutical process and funnelling within

Chapters 2, 3, 5 and 6 have undertaken this activity and addressed potential issues – as a process of building the base of the iceberg. Chapter 7 then is positioned to present the generative and emergent tip of the phenomenological iceberg.

Whilst the findings are intended primarily for brand managers, as they have been identified as being a group whose knowledge is rarely captured empirically in literature; findings have been derived from the perspective of brand managers and academics - who were asked also to reflect on consumer perspectives. Therefore, the thesis is judged to have a wider scope of generalizability and didactic elements of value for other associated stakeholder groups.

7.2 Approach to presenting main findings through theories

In this chapter, Delphi findings are now considered and mapped to the research questions and focal theory, as outlined in Chapter 3. Figure 38 shows how the research questions relate to the stages of the conceptual focal theory arguments.
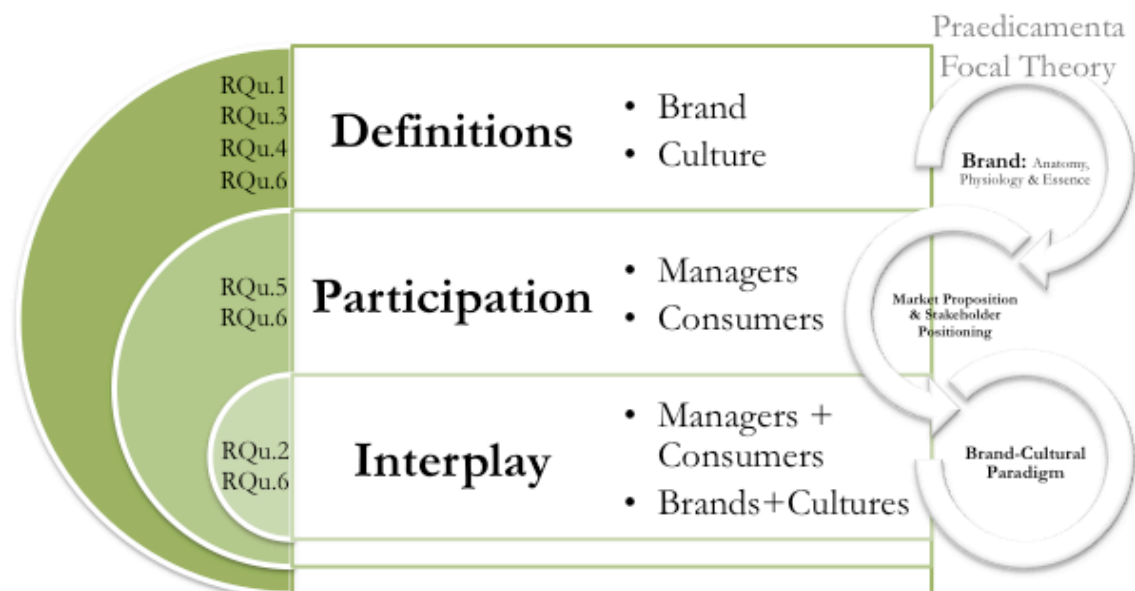
Figure 38 Research questions: grouped and mapped according to the focal theory

The purpose of which is twofold:

1. To present one coherent phenomenon, which addresses the research questions, as a singular 'Grounded Theory'
2. To evaluate why and in what way the stated background and focal theories are now different as a result of the empirical research work undertaken.

Thus, this signals the main contribution of the research undertaken and the achievement of the core purpose of this study. Further contributions surrounding the entire research process will be discussed in Chapter 8.

Strauss and Corbin (1990), argue that the presentation of theory requires:

1. A clear analytic story
2. Writing on a conceptual level, with description kept secondary
3. The clear specification of relationships among categories, with levels of conceptualisation also kept clear
4. The specification of variations and their relevant conditions, consequences, and so forth, including the broader ones. (p.229)

Strauss and Corbin (1990) also recommend that a visual presentation of the 'architecture' helps to clarify the central concepts and lines of the developed theory in a concise form. Flick (2009); and Strauss and Corbin (1990) suggest that in order to avoid the trap of wanting to write the perfect manuscript (which is never finished), the theorist has at some stage to 'let go'. The key to this is *letting things go at the right moment and accepting a certain degree of imperfection in the theory and presentation"* (Flick, 2009 p.415). Therefore, the following sections signal a necessary, controlled and intended 'letting go' of the research study, through the presentation of conclusions derived from empirical research - which whilst definitive, are also both reflective and reflexive.

7.3 Conclusions addressing research questions

The following section presents findings that are representative of stand alone conclusions derived from the study. As an extrapolation, when presented together in the next section, they will form the basis of a narrative, which presents one coherent and identified phenomenon. In electing to adopt a grounded theory approach to research, the ultimate goal of the doctoral study was to present one clearly articulated phenomenon, which in turn generates one

grounded theoretical framework. These two milestones signal the conclusion of the research component of doctoral study.

7.3.1 How should brands be defined and understood?

Prescriptive definitions were held to be surface-deep and potentially limiting, if applied to brands. Brands are best understood through comparing and contrasting brands with each other. This hermeneutical process of negative hypothesis testing yielded findings, which indicate what a brand is, and what it is not. The majority of existing definitions seek not to define what a brand is not and instead build upon what has been described before. Just as cultural norms, values and practices within society are revised and change over time; findings suggest that brand definitions and understanding should also mirror how humans define their own existence and purpose. Therefore a definition is more about a starting point of meaning and dialogue, rather than a derived conclusion. The researcher finds that the identified gap in brand definitions could be attributed to the fact that few define what a brand is not, and what it is not able to do. An overt appreciation of the unknown and the negative are therefore areas that need to be addressed and included in brand definitions, in the interests of pragmatism and completeness.

7.3.2 How do brands and culture influence each other?

Brands and Culture should not be viewed as separate disciplines. Rather, they are interdependent and co-dependent. Either can dominate or influence each other according to: the brand, context, fashion, those involved, and time. Whilst brands and culture can be viewed as separate subject disciplines, attempts at deriving meaning and understanding of each draws the other into evaluative equations – as an element, or a paradigm. Therefore, each represents a different lens of analysis. For example a brand can be an element of culture; or equally a brand approach to culture can be adopted. Evidence of both of these has been observed with anthropological approaches to conspicuous consumption, as a means of understanding human existence.

Recent literature and empirical observations are drawing brand and cultural lenses closer together in postmodernist society - hence the emergence of the

cultural branding school of thought. Conclusions point towards the weighting of influence and dominance of brands or cultures as being something that oscillates. This means that the brand-culture construct is neither static, nor linear. It is cyclical, dynamic and concentric, and rooted in time and context. Influence and subsequent dominance of either brands or cultures are judged to be according to: the significance of meaning delivered; level of social capital offered; and being a critical success or failure factor.

7.3.3 What exemplars help brand managers to predict the health and performance of a brand?

Exemplars should be judged according to both consumer and marketer perspectives. Where there are gaps, a mediation process of equilibrium has to be arrived at, rather than adopting a marketer or consumer perspective. Evidence should be quantitative and qualitative; and should be grounded in inductive evaluations, rather than merely deductive financial calculations. Future predictions have to be linked with longitudinal evaluative processes, in order to afford brand stability.

Therefore, a key finding is that more scholarship is needed in the field of brand management, which focuses on brand managers – as much appears to be deduced or prescribed, based upon assumptions and secondary corporate documents, rather than empirical field data. As an extension, due to the fact that brand managers hail from different backgrounds, they frequently bring with them different views on the application of evaluative frameworks, which outline how brands should be evaluated. This means that whilst evaluative results may be available, the methods undertaken and philosophical underpinnings by brand managers are more difficult to ascertain. There are also inferences that brand evaluations have elements of pragmatism and commercialism, which may mean that the evaluations lack rigor in places – due to the fact that they are used as a marketing tool; or incline towards being ad hoc and surface deep, due to time and resource constraints.

Furthermore, whilst roles can be determined through a title or classification, it is becoming increasingly difficult to separate the practices, influence and accountability of the brand manger, academic and consumer. In the background

theory chapter, Keller was cited as arguing for brand management through appraising consumer-based brand equity evaluations, which means that methods of judging brands from a corporate perspective are still influenced by consumer brand evaluations. Therefore, future research has to consider subject and role dynamism according to time, space and context – mapped backed to stakeholder networks. Wider implications are that brand management remains an area where few practitioners hold qualifications specific to brand management, and so research should investigate varying subject disciplines and the associated skills, which practitioners use to make evaluations. This also poses added challenges than are present in other business and management areas, where formal subject-specific qualifications help to consolidate and converge practitioner traits. The Delphi panel commented on this area: observing that research skills were essential for brand managers – however, few brand managers in fact have undergone any formal research training or education.

7.3.4 How universal are these branding exemplars?

Delphi participants argue that if understood properly, the laws and conceptual understanding of brands can be generalised across categories, brands and regions. They assert however that in practice few brands and brand managers are able to do so. Those that can have the potential to become global brand market leaders and able to govern culture. Background theory found that corporate branding argues for a universal conceptual framework, however less literature offers the same perspective when appraising product and service brands. And furthermore, there appears to be a feeling present in literature that the industry sector has an effect on the ability to generalise brand thinking.

The findings of this study, based upon the opinions of experts, contradict the suggestion that brand exemplars are not and cannot be universal. To this end, the study brings corporate and product/service brand management closer together conceptually. However, in bringing them together it is argued that brands will still remain dual and linked entities, representing a singular and sum total at the same time. Brands can be in more than one place at the same time and on different levels, which leads to qualities of transcendence – leaving trails and traces. This observation renders scales of time elastic and metaphysical.

Therefore, the researcher asserts that the field of branding will expand if not move away from that of product marketing. Background theory found that literature had cited a drift or gap between product marketing and brand management – with products dictating how brands are created and managed. Especially due to technological developments in virtual reality and the online world, it is observed that more design will be governed by the creation of a brand – as this is how products, services and even ideas will be located by consumers, in an increasingly information saturated world full of noise. Therefore, a key finding and resulting recommendation from the study is that brands and brand management should be fused with product and service design, which will ultimately lead to brand-led governance.

When feeding this point back to the previous section on role of the brand manager: it appears that unless further research is undertaken with practical steps towards nurturing and developing brand managers, they will be ill equipped to be able to manage this new role. This ultimately could lead to the demise unnecessarily of the brand manager and the brand. In some ways, through observing the diffusion and collective consumer-influence upon brand management, it could be argued that the demise of the brand manager may have begun. For there may be an argument for saying that too much control is sacrificed, through a lack of brand management excellence. Therefore, a significant contribution of this study is in raising this question, as a basis for further research, consideration and discourse.

7.3.5 What skills competences are required of brand managers?

Brand managers require peer acknowledged academic and practitioner experience. Their skills and experiences should be broad-based and encompassing a range of science and arts subject disciplines. 'Health' and performance predictions also necessitate the ability of managers to identify, capture and communicate critical success factors and trends, based on - intuition, intellectual creativity, entrepreneurial thinking, and collective internal/external organisational subjectivity.

As has been suggested previously, there is an argument for reviewing how brand managers are recruited, selected and trained. Furthermore, looking to the future,

the researcher considers whether more development is needed in the formalisation of brand specific qualifications. Currently, branding falls within the remit of marketing as a sub-discipline and there are formal advertising, marketing, public relations, sales, and management professional regulatory bodies, societies and organisations, which brand managers and academics are affiliated to. Examples of which are: the Chartered Institute of Marketing, the American Marketing Association, the Academy of Marketing, the Marketing Society, the Global Marketing Network, the Chartered Institute of Public Relations, and the International Public Relations Association, amongst others. However, branding bodies and organisations appear to be more concerned with the evaluation and ranking of brands, mainly for commercial purposes. With brands exhibiting traits which draw research and their application towards lenses provided from other subject fields as wide ranging as accountancy, anthropology, design, economics, engineering, finance, history, journalism, law, linguistics, management, neuroscience, politics, psychoanalysis, and psychology amongst others: there is an argument that there should be a process of consolidation within the field of branding; and that branding should be a recognised primary discipline, rather than a sub-discipline of marketing. As can be seen from the examples, Public Relations, whilst considered a part of marketing, has managed nevertheless to establish such bodies.

Currently, brand mangers were observed to hail from all of the subject fields listed earlier – which offers great potential for future knowledge sharing and information; but also has the potential to open the door to conflict, if it is not consolidated through mediation and formalisation. Therefore, a further recommendation is that there should be additional work and consultation undertaken, which looks at both curriculum development and the establishment of practitioner focussed professional bodies.

7.3.6 Do academics and practitioners understand brands in the same way?

Despite anecdotal evidence to suggest that there is an academic/practitioner gap, when this point was investigated, Delphi findings suggest that there was no gap in understanding amongst the panel. Rather, minor differences in the language

and approaches used to understand brands exist. Therefore, wider generalizations could be concluded that, amongst experts and those within branding, there seldom exists a divide, except when there are inherited generalist opinions within wider academia and industry. Whilst these assertion of a divide may have been true previously, which can only be deduced from literature searches, there is no reason to suggest that they actually do or should remain. This leads the researcher towards arguing that this point needs further empirical research; and if allowed to remain unchallenged in the interim, it may have an avoidable adverse affect on the subject field.

7.4 Grounding the Brand-Cultural Praedicamenta theory

Background theory conclusions indicate that traditional brand approaches focus on an inside out view of brands - by first defining brands and then determining how they perform. More recently over the past ten years, the cultural approach jumps from defining and refining brand thinking, towards expanding it to consider cultural interactions. This is embodied through the 'bird view' top-down bottom-up approach advocated. Whilst this approach was supported by the researcher: in addition what was suggested was the argument for an additional step, which maps out networks and contexts, through stakeholder analysis. In doing so, this approach advocated an outside-in approach as a starting point; from which a top-down, bottom-up approach was followed. The difference in this lens of analysis was that it highlighted four factors:

1. The balance and significance of the brand manager/consumer interplay should be weighted in favour of the consumer

2. Consumerism should be viewed as not being determined just by the purchase of a branded product or service. Rather, brand consumerism is governed by and present in a wider sphere of human existence than the branded product or service. As consumers have amassed such high levels of control, brands can and do exist outside and beyond the objects, services and organisations that they were created for. Brands have become objects in their own right, which gifts them a separate life cycle than that of a product or service. This has meant that they have been used

increasingly to create brand extensions; and as words, language, terms and explanations to define modern-day existence. Therefore, defining usage in turn has to accommodate evolutionary intangible as well as tangible elements

3. The complexity and reality of culture should be considered in tandem with brands. So, rather than a cultural approach to branding, where a brand is an agent and artefact of culture; culture is also an agent and artefact of brands. Therefore, additional meaning and contextualization of culture was advocated and linked to branding, in order to mirror those present in existing brand theoretical frameworks

4. Whilst accepting and arguing for brands being treated as human-like entities, their presence enjoys elements of duality. Brands are viewed, treated as, and behave as humans. However, they are also metaphysical philosophical constructs, which bind together collective memes, individuals and objects.

From these assertions, the *Brand-Cultural Praedicamenta* was presented as a focal theory and thesis [Figure 39]

Figure 39 Main focal theory: The Brand-Cultural Praedicamenta

Following this Delphi study results found that:

- Culture defines brands
- Culture determines who, where, when, why and how a brand exists
- Brands can drive and define Culture reciprocally
- However, few brands govern culture.
- And as such, most brands are a product of culture.

Reflecting upon and embracing the panellists' view lead to researcher refining the focal theory model [Figure 40]
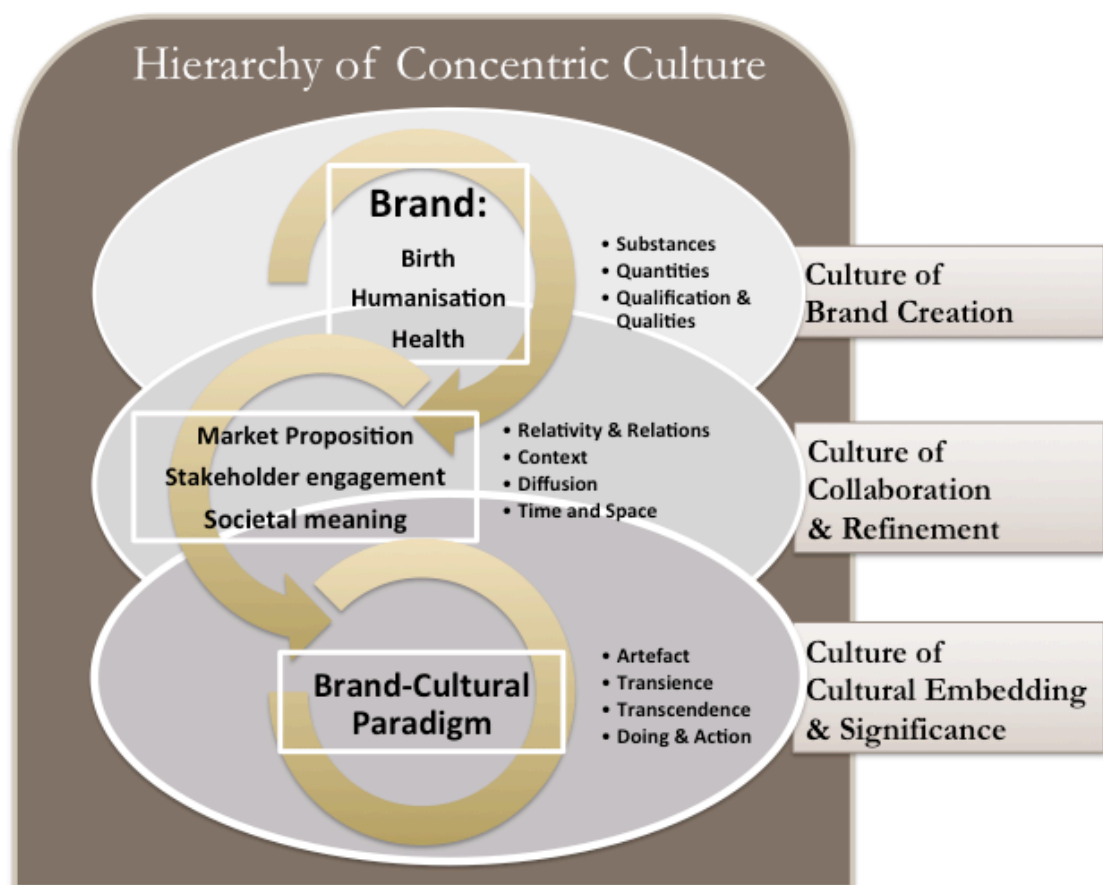
Figure 40 Main thesis: The Brand-Cultural Praedicamenta

Therefore, it is argued now that culture is present throughout the praedicamenta model. Culture exists on different levels and serves different purposes at each stage of the process. This means that before a brand-cultural paradigm comes into existence:

- Brand managers, designers and brand creators are cultured
- There is a cultural process employed when creating a brand
- Brands become cultural artefacts and agents
- Marketing a brand is a cultural process

- Humans exist within contextual cultural systems, which brands enter
- Markets, exemplified through brands, create and respond to cultures
- Brand stakeholders are drawn into new dynamic collaborative cultural systems

These then culminate in a brand-cultural paradigm, which signals:

- Cultural innovation and creation
- The sustained existence, relevance and meaning of a brand

The Delphi panel argued that brand managers were guardians of a brand's essence, heritage and stakeholders. Therefore a key finding is that whilst consumers may adopt, nurture and influence brands, the initial surrogate and parent of a brand is the brand manager. Based upon this, the researcher poses a polemical argument: if a brand is a human; then when observing how humans comparably succeed or fail, an individual's ancestral heritage (parents) and upbringing are frequently evaluated for clues. However, literature points towards a paucity of research on the views, experiences and attributes of brand managers. The research study here therefore collected practitioner cultural data, seeking to ground cultural frames of reference and influence from the outset.

When considering the humanisation of brands in more detail, findings suggest that defining a brand beyond its 'biological' and 'anatomical' function is problematic. Following the same train of thought: judging the 'success', 'failure' and 'mediocrity' of an individual in society, based only upon physical attributes, is highly contentious. This is perhaps why later approaches sought to investigate brand personality and relationships in more detail.

However, when cross-referencing these again with human existence, the inference is that better 'humans' have more relationships, garner greater loyalty from more people, and possess stronger coherent personalities. It is argued that frequency, longevity and volume of relationships; and stronger personalities do not necessarily gift humans, culture and brands critical success factors. Cultural anthropological approaches argue that there is no 'better' or 'worse' culture, there just *'is'*. Therefore the researcher holds that the same can be said when evaluating brands. It is debateable whether empirical evidence can fully encapsulate what makes a brand better. As an analogy, because branding draws from religious terminology such as 'icons', it is suggested that when looking at religions: concepts of deity, observance and spirituality conceptually cannot be ranked and

judged as being better of worse than each other – they just *'are'*. And so, Brands *'are'*. They are subject to contextual evaluations, which can position them as being better or worse, but this judgement is linked to the mind of the beholder.

As a further response, the researcher poses an additional polemical argument, which is: as human relations are more organic, nuanced, subjective, intuitive and impulsive; comparably can brand scales predict future success? Furthermore, 'bird view' surface judgements made by those outside of a relationship, if in the absence of detailed understanding, may even view these relationships as being puzzling, or even paradoxical. Evidence for this has been provided in earlier sections, where brands were consumed by non-target consumers and viewed in ways not predicted. In addition, irreconcilable cultural differences may yield acceptance, but not necessarily understanding. These observations it can be argued conform with the human existence – in that not all of life is known, can be judged, or predicted.

Therefore, findings and discussions suggest that defining brands and culture, and calculating their value are only a starting point and a 'health-check', but not a guarantee of their worth and understanding. More important is an evaluative appraisal of what brands and culture mean to others and where/how/why they ascribe value to them. This means that whilst the laws and processes may be universal: subjective opinions and conclusions may be capricious – and these are facets of human existence. In tandem, comparing cultures can only be achieved to a point. And so, as brands aim to be humanly unique and cultural: a component of their essence will be irreplaceable and perishable.

7.4.1 Cultural brand stakeholders

As insufficient depth in stakeholder analysis has been observed as a literature gap, the following discussions consider the brand stakeholder model [Figure 41], which is presented as a supporting thesis to middle component of the brand praedicamenta. Here, brand stakeholder considerations are used as a syllogistic method of investigating the praedicamenta.

In stakeholder diagram the argument was that the non-User has influence and significance and therefore should be considered as stakeholders. And so charting their presence would help to evaluate brands more accurately.
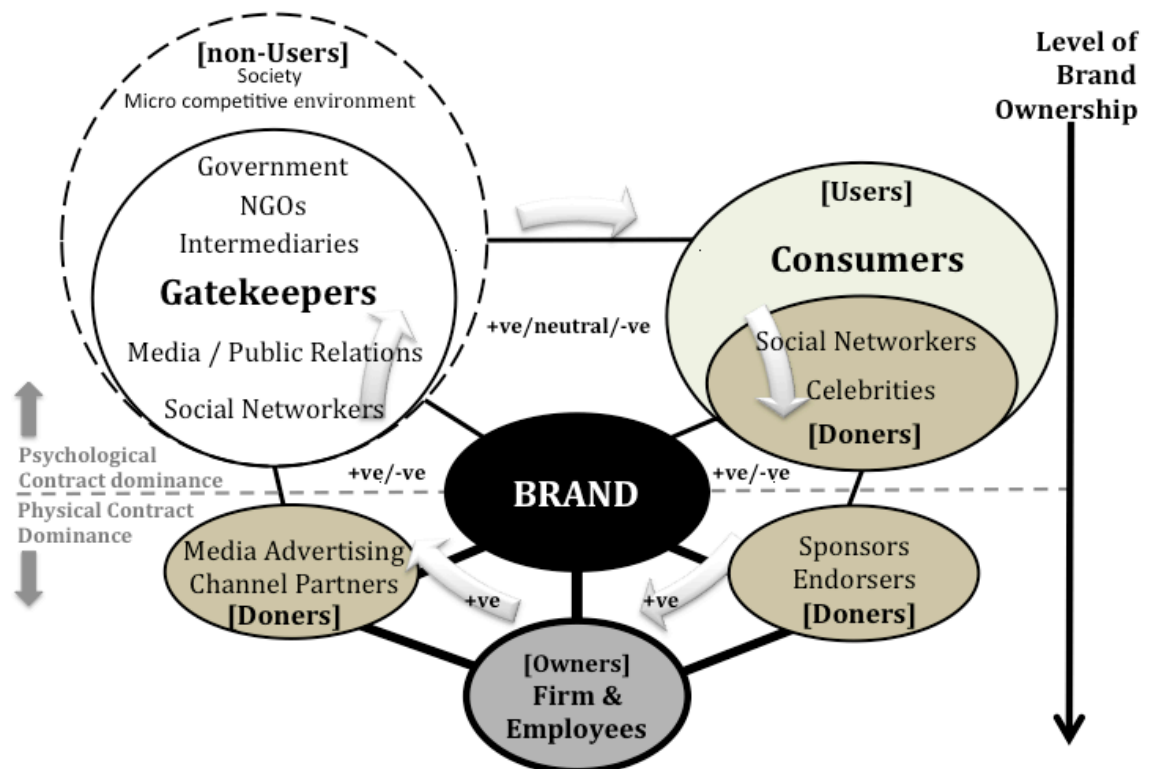
Figure 41 Brand Stakeholder model - through communication mapping (Wilson, 2011b)

Literature indicated that traditional brand approaches mainly concern themselves with formal contractual obligations. This means that brand stakeholder analysis has largely been corporate focussed. In more recent schools of thought, community and relational approaches observe the significance of consumers - and this introduction raises their prominence. However, it is argued that these observations often tend towards formal transactional contracts, such as the sale of goods, or ideas of defined economic value driving consumption. Therefore perversely it could be argued that stakeholder analysis within this paradigm is more about labelling *'takeholders'* rather than acknowledging stakeholdership.

Brands have been found to challenge such hard definitions and findings suggest that the consideration of value is in fact much more subjective, fluid and capricious. The cultural approach does highlight the issue of non-consumption through single-issue politics and boycotting. However, there is less of a sense that these parties are legitimate stakeholders, due to conflicting participation.

Therefore, the researcher argues that brand stakeholder analysis should be judged more according to communication networks and charting how parties mediate and distribute control, through hard and soft power.

The difference therefore is that rather than non-consumption being a threat, or something which should be addressed through encouraging consumption; it should be accepted as a facet of human behaviour. Individuals and collectives define their own reality as a means to gain power and control and this culminates in a cultural paradigm. From this, it is argued that non-consumption of a commodity does not necessarily mean non-use of the brand. This is because brands are cultural artefacts, used as a form of social capital, even if through merely using their name as a verb or descriptor of a social activity of trait; then this is in fact still consumption – which contributes towards a higher potential for physical commodity consumption.

In expanding the interpretation of contract, the concept of psychological contract has been introduced. In Human Resource Management, day-to-day employee interactions are argued as being governed more by psychological contracts. And rather, formal contracts are brought into consideration: where there is a time specific need; breakdown in trust; or absence in knowledge and guidance.

Furthermore, the Delphi panellists supported the position of separating and highlighting supportive marketing functions such as the media, public relations and advertising. When mapping them as part of a stakeholder network, it became clear that they shared influence, but they had different:

- Functions and properties
- Influence
- Usage
- Types of contract

In response to observations of dynamism and self-defined roles, an additional state was also introduced – termed *donership.* This was judged according to

formal and psychological contracts. Finally, the conclusion was that stakeholders can and do change their position and state. Therefore, the stakeholder model is seen to be akin to a photograph – in that it is grounded in a time, place and cultural context.

7.5 Presentation of a coherent Brand-Cultural phenomenon

Having addressed and presented findings mapped to the research questions, which allowed for a testing and refinement of the focal theory: the following section now presents the identified phenomenon, which has its genesis in the purpose of the doctoral study – and thus is the Grounded Theory. Through following the doctoral study process of empirical investigation, the researcher is now in a position to present one coherent and critical conceptual narrative - which not only embodies the observed phenomenon, but also grounds conclusions concerning the phenomenon with an empiricism derived from a structured system of methodological scientific philosophy. The secondary purpose of which is to present a body of knowledge and research, which can be further tested in future studies.

The Phenomenon: as derived from empirical doctoral research

Brands and Culture are both interdependent and linked constructs, which exist on different levels of human extraction in modern society. They are anchors of meaning and nodes of communication. As such, consumption of both has become an intrinsic function of human nature; is conspicuous; and a collaborative process - which affords self-defined social capital to engaged parties.

Culture and Brands (collectively and individually) are allegorical and analogous to intuitive organic matter and antimatter: in that they possess asymmetric particles, boundaries, and explosive properties - which are complex, interactive, expensive and difficult to control. Understanding them is a process of metaphysical discovery, which due to their exponentially defined existence, properties, position, context and timing: renders them invaluable. This in turn

gifts brands and culture with the status of transience and transcendence, in a manner comparable to humans.

Due to their efficacy, which is both local and global, they are used to establish, assert and maintain control. Control is held to be an inherent human pursuit, and by extension one of brands, on different levels: starting with individuals, and moving up to collectives, organisations, nations and any other homogenous binding units and affiliations. In addition, with increased societal and human complexity in cognitive, affective and conative traits: homogeneity is a porous dynamic state, which provides a platform for hybridisation and innovation, as evolutionary processes, as opposed to being a static construct. This leads to heterogeneous traits of surrogacy seeking - which rather than being a zero sum game, are in fact a form of wealth creation and organic progression.

The most recent development of acquiring control is that there has been an increase in the ability to self-define and proclaim control, through the ownership of tangibles via their intangible attributes and features. Furthermore, driven by a technology-filled wired internet and virtual world, ownership is demonstrated more through soft-power, referral and peer acceptance; and has become governed by occupying communication space in the widest sense (verbal, non-verbal, oral, written, and visual), and a 'share of voice'. These influence 'share of market' and render market understanding towards being more intangible.

Therefore, the more humanoid a brand is, along with being more culturally active: then the more successful, transient and transcendent it becomes. These developments and factors have led rise to the brand-cultural phenomenon. Control of this brand-cultural paradigm necessitates that brand managers are actively engaged in the pursuit of cultural professionalism and expertise embedded in societal servitude – where brand managers are able to draw from a broad base of skills and experiences, and have a high degree of peer-acknowledged intellectual aptitude.

The impact on brand managers has been that they have had to become more qualified, both academically and practically, with an increase in cross-disciplinary and transferrable subject skills and knowledge. These are alongside managers being in possession of demonstrable active cultural networks: in order to

communicate authenticity and to provide a renewable knowledge base, keeping their knowledge and application linked to real-world events.

Future predictions are that branding, as a subject discipline will expand in terms of its remit and it is on the ascendency, due to its efficacy and affects on business and society – which are both commercial and socio-cultural. Furthermore, with this rise, the role of the brand manager and the governance of brands without care and attention may have wider implications on brands, brand managers and stakeholders. For example, brands are seen to influence more that the organisation, product and service offerings – they are also affecting other areas of generalist human behaviour and interactions, such as: education; ethnicity; language; national identity; nations; international relations; religion; and ancient, modern and contemporary history.

Brands transmit messages and brand managers are their message creators. Therefore, there should be research together, which is where there is a current gap in knowledge. Researchers are beginning to forensically unpick brands, branding strategies and their effects on target users; but less research attempts to do the same for brand managers. However, when examining consumer research for example, it can be seen that now studies even stretch into neuroscience. It is argued that whilst there are merits in this, there is also a call to investigate designers and brand managers in the same way, to see how they perceive their own messages, in order to fill in gaps associated with encoding and decoding messages. The researcher does concede that practitioners may be less willing to put themselves in the laboratory, for fear that it may unearth findings which brings their own perceived professionalism, expertise and excellence into question.

It is also apparent that collectively, brands and brand managers have the power to shape perceptions of reality, which even have the potential to reverse the most dogmatic of views. Evidence of this most recently can be seen with how branded commodities have been used as part of an engineering process of being able to change historical perceptions. The Delphi panel observed how brand strength that has driven consumerism has removed, weakened, or overturned cultural barriers. Examples of which can be seen with German, Japanese and US brands

entering markets where their previous records of political and humanitarian activities have been far than favourable.

With these observations in mind therefore, brands, branding and brand management are a culture of cultured activity – which now renders them inextricably linked with culture, but more significantly human existence. A key finding and contribution of this study is the argument that culture and management cannot be fully investigated unless brands are also considered – as brands have become conceptually and irreversibly embedded within humans.

Therefore, the identified need for research within this doctoral study finds that the way in which culture, brands and management are treated and understood has to be adapted and refined in tandem which the changes in human existence – which are cognitive, affective, conative and extreme cases biological. Recent studies have shown that some consumers in extreme cases have exhibited signs of addiction, comparable with chemical dependencies. In presenting these observations, the researcher asserts that the field of branding brings together the arts and sciences and provides evidence for the use and adaptation of terms, which also draw heavily from the life sciences. The implications are that future brand studies, whilst being perceived more conventionally as social sciences, could work towards incorporating more applied and natural science.

Phenomenological linkages to gaps identified by background theory

Background theory found that literature did comment on brands, management and culture – and more recently with them being examined together. Furthermore, the role of culture, stakeholders and other environmental factors, such as globalisation, the Internet, population patterns and their impact on commerce and human behaviour have been documented. However it is argued that within this body of knowledge remained gaps. Anomalies in human existence and brand performance still pose problems when trying to ascribe meaning and ultimately make future predictions. The researcher argues that these will never be eradicated fully, as they follow cycles of orthodoxy and heterodoxy, which delivers revolutionary developments that cannot chart evolution as a linear progression. For example, some technological advancements

are rejected in favour of heritage and retro offerings, which after their occurrence are often attributed to incorrect predictions or a facet of human nature. This had led rise in business to the anthropological approach of accepting occurrences as cultural constructs, shaped by the man-made environment, and as intrinsically neither good nor bad, just as they are. This poses challenges in business and management, as commerce exacts that prediction and control, through scientific methods is a core pursuit.

The battleground appears to lie in being able to draw from anthropological methods in order to expand control and thus increase the ability to perform scientifically in a rational, rather than an intuitive and emotive sense. However in doing so, a key question is whether this pursuit moves brands and brand management away from a critical success factor - which is that some aspects of the unknown and uncontrollable in fact increase control and success.

Therefore, in appraising the presented phenomenon in connection with the literature gaps, the researcher finds that gaps can be identified, but having done so are unlikely to be filled completely. Rather, knowledge is expanded and this has an osmotic effect of transferring knowledge in a way, which may in fact create gaps in other places. This is not to say that if new gaps occur they represent short fallings in previous work, but instead that this is an inevitable process of discovery, which necessitates continuous scholarship in the field.

This study has expanded the body of knowledge in the more human traits of brands, their efficacy, who manages them, how, when and where. This has pulled the subject discipline closer towards cultural and anthropological approaches. In addition, attempts to remedy the identified gap in knowledge, through not addressing the views of brand managers, has been delivered.

7.5.1 Reflections on the refinement of background and focal theories

The Delphi study was observed to assist with grounding the emergent and generative conceptual theories, constructed by the researcher. Findings did little to challenge the background and focal theories presented – rather they offered support. However, the Delphi panel did offer contributions of additional erudition, derived from collaborative and iterative experiences of mind-sharing. The panellists' intellect and real-life international experiences provided a

richness of data and information, which allowed the researcher to: group, contextualise, and establish causal effects and consequences in greater detail. This elevated the researcher's observations into being an applied science to a higher degree; and thus fit for purpose for the wider professional community - due to the ratification of findings by academic and practitioner peers. A component of this theory building and phenomenological identification necessitated that explanations were quantified and qualified through narratives and discourse. By gathering primary empirical data, which responded to the research problem in particular, and addressed gaps in literature and understanding, the theory gained meaning and justification.

7.6 Conclusions

This chapter presented the identified phenomenon resulting from the doctoral study. Findings support the thesis of understanding brands through cultural and management frames of reference. As management is a collaborative process, which mediates brand relationships inside and outside of organisations, brand-centric stakeholder analysis holds the key to understanding control and critical success factors.

Furthermore, in support of this research approach, the iterative Delphi method is held to be both:

- A useful method for investigating brands, management and culture as societal phenomena
- A reflection of how individuals are increasingly arriving at understanding in wider society, through the use of communication methods such as social media, and derived meaning from conspicuous branded consumption.

The study fills a gap in attempting to bring together brand thinking and literature, which is often polarised along scales of economic and anthropological governed discovery. These are observed to be attempts, which wrestle with the challenge of how much can be quantified and qualified. In the face of increase hyperactivity and complexity, cultural anthropology appears to offer a more pragmatic approach towards deriving meaning - creating a platform for phenomenological analysis. However, much of the literature that adopts an anthropological standpoint does so through observing how brands perform

according to the market and consumers. By inference, the suggestion is that how the brand performs represents how brand managers and organisations perform.

Firstly, the researcher chose to investigate the views of brand managers to see if this assumption was valid. This filled a gap in providing empirical data, which captured the views of brand managers - of which there appears to be a paucity of literature. From this, findings also suggest that assuming brand manager evaluations can be made through the brand and/or the consumer has flaws – because brand management is a diffused and collective activity between brand managers and other stakeholders. Furthermore, it fails to take into account that brand managers are also consumers, who use their consumerism to influence their brand management. Therefore, models in background theory, which present a marketer-consumer construct, are an over-simplification - which may bear little resemblance to reality. Likewise, the idea that there is an academic-practitioner divide within branding appears to be a notion, which whilst it may be present in other business and management subject fields, is less conclusive in branding. Biographical data of participants and anecdotal observations of the biographical data of other academics internationally, points towards academics being engaged in industry - and often as practitioner consultants. Therefore, branding academics are likely also to be practitioners.

These findings are significant in that they contribute to theory, as existing definitions and constructs have been found to be limiting and with gaps. Secondly, in reappraising the role of participating subjects - through what they can deliver; and how they can be classified and understood: methodological contributions have been made; and new avenues and categories for data collection have been offered. Finally, the focal theory and supporting phenomenological narrative provide a basis for further developments in the field – equally applicable to both brand managers and academics, for different purposes.

Having critically appraised, discussed and presented background and focal theories alongside empirical data findings in this chapter, Chapter 8 will now present the overall conclusions, original contributions, limitations and future directions for research.

Chapter Eight: Conclusions

Thesis overview, reflections and defence

Chapter 8: Conclusions

8.1 Introduction

The following chapter summarises the key thesis findings and conclusions within one coherent position and standpoint, signalling the completion of the doctoral study. In addition the identified significant contributions to knowledge are presented. Finally, implications, limitations and suggested future aspirations of research activity are considered.

8.2 Summary overview

Most recently, over the past decade, it was found that the cultural approach to brand management represents a new school of thought in academic literature, which captures the aims, objectives and practices of brand managers – locally, internationally and globally. This school of thought emerged from relational and community based brand perspectives: which chart the rising role, significance and influence in brand management of connected and savvy consumers. Such changes gave rise to observations that: culture; a cultural approach; and shared responsibility and participation govern the management of brands.

Furthermore, identified trends of economic migrancy; the increase in multi-racial and multicultural relations, evident in childbirth; urbanism and urbanization; Globalization; conspicuous branded consumption; and Web2.0, amongst others, continue to drive new methods and channels for information exchanges, collaboration and societal understanding. These in turn are also shaping and changing the way in which branding, management and consumption are being understood and practiced.

Brands have gravitated towards a position of offering individual and societal meaning. In doing so they have become cultural artefacts and language shapers. In tandem the conceptual argument for a brand being understood and used as a

'human' has grown in prominence. Collectively, these represent a global cultural phenomenon where the management of brands is a cultural, diffused and self-defined practice.

In response, the study examined this identified phenomenon in greater detail, from a brand management perspective. The aim was to investigate the nature of the relationship between culture and brands – to the benefit of brand managers.

The method of qualitative investigation elicited iterated views from an international panel of academics and practitioners - in the form of a 16 month Expert Delphi Study. Through the Delphi process, they were encouraged to arrive at a consensus of opinions and understanding.

What became apparent from the background theory study was that the schools of thought are not so much reflective of a progression and transition of thought as is inferred by literature in general and specifically by grouped schools of thought; but instead the researcher found that they follow a cycle. This cycle appears to be an attempt by stakeholders to establish control through different methods as environmental factors change. However, with an increasing number of significant stakeholders: power, which is linked to control, has to be mediated – making them precarious, temporal and contextual.

Furthermore, the lens used to establish where control lies is subjective and, in places, incompatible with perceptions and definitions of the role and nature of brands and culture. This has lead to the emergence of evolutionary schools of thought in order to establish form and function. Nevertheless, evolution has a genesis: and it is judged that the genesis of being for brands and culture is the role of the human stakeholder; and the progression of them humanising objects and artefacts, such as brands. The identified gaps in the literature are fourfold:

1. Sufficient progression in brand definitions, which capture the full applications and potential of brands in the face of recent societal developments within the same timeframe

2. Sufficient detail as to how human brands are

3. Stakeholder analysis from a brand-cultural perspective, which maps networks of communication and control

4. Guiding principles for brand managers in touch with a global and culturally complex environment.

Collectively, background theory and Delphi findings indicated that brands, culture and brand management are linked to a dynamic and reactive environment. In tandem, brand management is increasingly being seen as a collaborative and diffused function, which in turn poses challenges – as a key objective of brand management is control and naturally something sought by brand managers and organisations.

Biographical data of the Delphi participants also pointed to the fact that cultural diversity and understanding, achieved through social networks; shared and adopted cultural heritage; and real-life experience through travel, were seen to be critical success factors of brand managers, used to generate brand expertise, skills and competences. This was something that rendered branding as a cultural experience and something beyond academic qualifications. However, the role of academia was held to be a process for elevating brand manager's intellect, through critical conceptualisation, within the arts and sciences; whilst communicating their competence - instead of being a vocational activity.

8.3 General conclusions unearthed resulting from the research questions

A new, *grounded* theoretical framework for brand management was developed - which took its inspiration from Aristotle's *Praedicamenta.* Here, theory was generated through engaging and eliciting the views of brand academics and practitioners – towards consensual collective understanding. In addition, alternative culturally based criteria for collecting and analysing biographical data were proposed, to support the merits and generalizability of findings, and to mirror the cultural approach to viewing brands and brand management.

The phenomenon of brands being associated increasingly with culture was identified. Prior to the study, it was unclear what the true nature of the observed phenomenon was and how it behaves. Therefore the researcher attempted to

define and understand the phenomenon in more detail, according to: causes, consequences, intervening conditions and context.

Central to the phenomenon was establishing what sort of relationship brands and culture enjoyed. Therefore attempts were made to investigate the presence of interdependence, co-dependence, balance, blend, dominance, influencing factors and fashionable trends.

Stakeholders were observed to influence brand perceptions, understandings and practices. More specifically, brand managers were seen to control brands; and both brands and their managers were judged as being linked with culture. However, what was meant by culture in a brand context, as one terse and tenable definition (as is often desired) was rendered ambiguous and therefore restrictive – and as an extension continues to remain problematic.

Brand practitioner experts were selected as informed individuals who could provide valuable insight and opinions, which were then used in order to establish depth, texture and understanding of the identified phenomenon. Rather than applying hard definitions, their views and findings tend towards brand and cultural understanding being attained through: the pursuit of negative hypothesis testing, embodied by Socratic methods of questioning; sharing experiences and engagement; and investigating case examples across territories, sectors, time and context.

8.4 Detailed conclusions concerning the overall research problem

Findings of this doctoral study suggest that culture and brands share strong relationship bonds, brought into existence by human desires. Equally, brands and culture both have the ability to influence each other. Furthermore, the successful management of brands requires a cultural approach, which mediates dynamic and complex networks of brand stakeholder relations. It was concluded that the understandings of brands, culture and management have to take into account: context, space and time – as porous boundaries of transience and transcendence.

The following points identify the key conclusions derived, resulting from the doctoral study findings in more detail. The key focus of which is to establish the nature of brands, branding practices and how these can be managed.

8.4.1 Brand existence, landscape and interactions

- It is observed that branding aspects of marketing in particular, as presented in the doctoral study, are increasingly judged to be cross disciplinary and highly philosophical - as brands, management, and most recently the emergence of cultural brand approach, tap into a emotional and emotive facet of human existence.

- Evident in literature, brands are viewed, in part, by professionals and the wider public as having 'human' characteristics, or are made to be as such.

- The reason for this being 'in part', is because findings suggest that theoretical frameworks, manifest in the different schools of thought, still appear to have gaps. This was unearthed through the researcher's use of syllogisms and Socratic elenchus negative hypothesis testing. Building on background theory and the data collected from the resulting Delphi study, it was argued that these theories cannot explain all of the observed current phenomena, or put simply: not all brands and branding approaches fit into observed theoretical frameworks and definitions, or succeed by conforming to them.

- In tandem, some more literalist and financially driven economic interpretations, ranging from modernist and postmodernist standpoints, argue that inanimate objects can never become *truly* human. However, most recently, conceptually strong arguments drawing from: conspicuous consumption; social and biological psychology; and esoteric poststructuralist lenses indicate that these branded objects are 'things', which are hard-wired into humanity. Therefore the lines are so blurred between individuals and their things, that this phenomenon renders being

human intangible, with such attributes being shared between individuals, objects and cultural experiences.

- Defences of object *humanisation* are not a new, as debates can be charted right back to ancient times, outside of marketing theory. However, a growing consensus of marketers in postmodern society is pulling the pendulum of rationalist constructs back towards antipositivism, in the face of observed human complexity. It is argued that literalist views of human existence, necessitating 'flesh and bones' bones static definitions, miss a critical element within the human psyche. And as an extension, polemical arguments have been offered that brands are more comparable to such metaphysical things as religious deities and spiritualism - due to their observed transcendence.

- The 'flesh and bones' definition of a brand in the cultural approach, argues that a brand is a cultural artefact. Furthermore, a brand's meaning is not simply its form, but its function – as understood through consumption, transactional usage, and ascribed collaborative meaning. Metaphorically, it is argued that flesh and bones definitions are nevertheless organic and therefore subject to perishability and denaturing. By taking this metaphorical interpretive position, the researcher mediates between polar exoteric and esoteric standpoints, in order to preserve the relevance of historical definitions.

- Artefacts help to ossify the more perishable elements of branding, culture and management, which convey essential tacit knowledge. Furthermore, they counteract the sclerosis of theoretical models and schools of thought.

- The critical success factors of a brand are unique and perishable - just as for humans. Furthermore, perishability also applies to management and culture in a comparable fashion. Therefore, just as humans study

exemplars and follow rules for success, but they do not always work for every person in the same way: some brands and managers may follow all of the rules and fail, whilst others break the rules and succeed.

- Culture in contrast may be perishable, but is not governed by success and failure. Therefore the cultural approach to branding pulls brands and managers away from traditional rules of judging success, and in doing so this can offer them stability, longevity and gains.

- In a wider context, perishability is linked to Socratic and Delphi philosophical sentiments of 'giving birth' to organic knowledge. In addition, theories, as asserted in Grounded Theory methods are emergent and generative. Therefore theory building is an organic process of growth, judged by health, strength and a life cycle.

- As brands fulfil the role of being cultural artefacts, they become vehicles for transmitting meaning. Their meaning hinges on Power, Legitimacy, Urgency, Ownership and 'Donership'.

8.4.2 Brand management theory building

- Therefore with these in mind: as brands can and do behave like humans, frameworks have to be reviewed, humanised and personalised. Brand practices are also time and situation-specific – leading to dynamism. From this it is argued that retrospective reviews and quantitative measures will only unearth certain aspects of a brand. What are of more significance are Socratic approaches to gathering consensus, through dialectic enquiry and problem solving, which share, bring and preserve tacit knowledge out into the open.

- Modern-day socialisation drives hyphenated contextual identities, which are mediated through interconnected social networks. Following this point, as brands are viewed as 'humans' they should be investigated in tandem with their 'friends' and stakeholders. The most significant of these being Brand Managers - as their closest guardians, friends and creators.

- The management of branding and culture are governed critically by skills, which can only be acquired through experiential discovery, constant comparison and collaboration. Beyond this, control of them necessitates leadership, which is supported by notable traits of demonstrable creativity, entrepreneurship, intuition, and ratified legitimacy.

- In tandem, brand audits, calculations and appraisals should also investigate the attributes of their managers, linking them together - as brands share a close relationship and are allegorically humans. From this, a recommendation is that brand calculations and investments incorporate the needs, skills and equity possessed by their managers

- These conclusions place brands squarely in a cultural paradigm, where culture on different levels is seen to shape brands. But equally, brands have demonstrated that they are also capable of shaping culture. There has been a growth in the number of brands and their usage beyond a marketing function. They are used as shorthand for people to define or classify the attributes of other things and reality - such as someone's personality or a national identity. Furthermore, some have become verbs and adjectives, which are held as exemplars of global brand successes. Language is central to cultural transmission and communication. Therefore, the language and communication of a brand as a cultural artefact is central to its health, relevance and efficacy.

- The quest to ascribe universal laws of meaning and understanding are

held to be possible and worthwhile. Although, these are subject to context, time and frame of reference. More accurate subjectivity may be achieved retrospectively - however the battleground and enigma lie in empowering individuals with the ability to foresee and predict future gains.

- Therefore, the role of theory is to not to model and define entities such as culture and brands, but instead to model a lens of perception, which brings a phenomenon into focus. Such focus then allows for the definition of brands and culture, through poststructuralist approaches to functionality. This necessitates hermeneutical cycles of metaphysical iteration. These set concentric boundaries of meaning and context refining thought - through deductive/inductive; positive and negative hypotheses; which are grounded in the here and now.

- Thus the concept of time is rendered more conceptual, than subject to empirical positivism. Time is transient and transcendent - as are individuals, brands and culture.

As a culmination of doctoral study: following the stated findings and derived conclusions, the Brand-Cultural Praedicamenta model was proposed by the researcher [Figure 42].
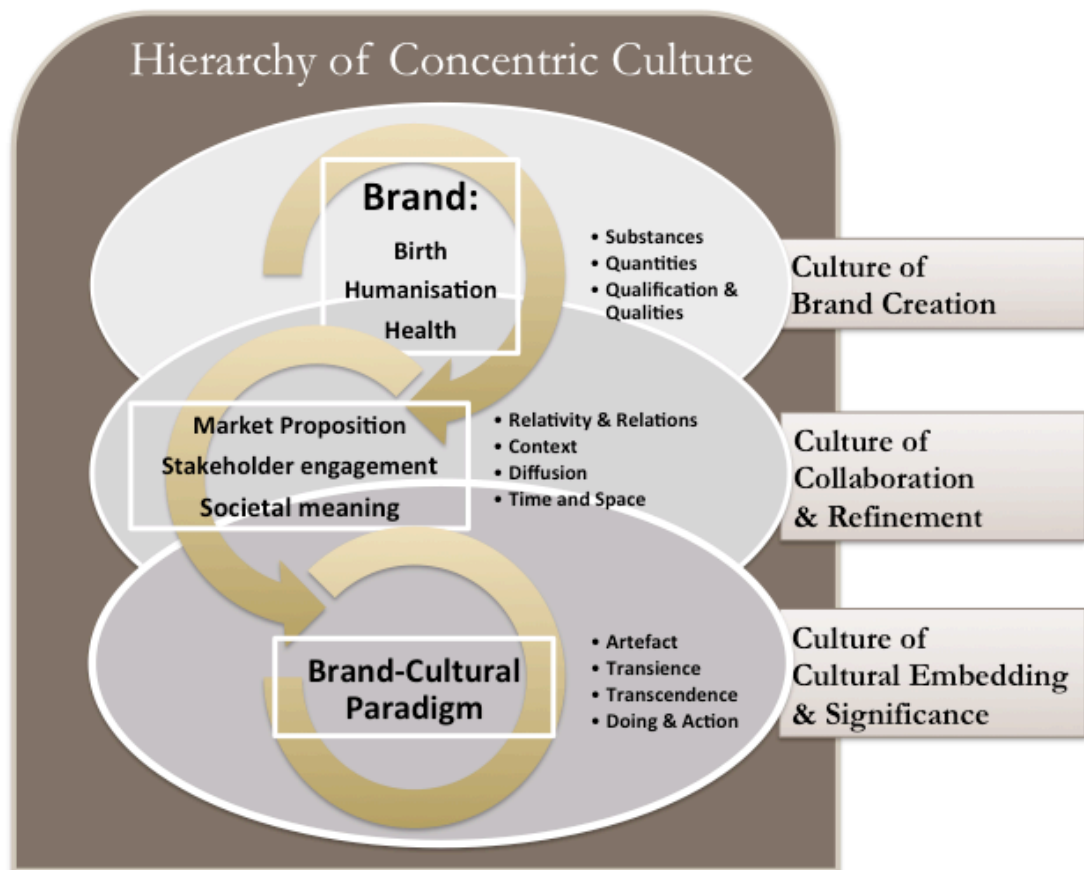
Figure 42 Main thesis: The Brand-Cultural Praedicamenta model

The model is held to offer a structured set of new guiding principles, applicable to both academics and brand managers, in line with the objective of solving real world problems – through the pursuit of applied science.

8.5 Contributions to new knowledge

The following section outlines the key contributions presented in the researcher's doctoral thesis:

8.5.1 General subject scholarship

1. Testing of existing and established principles within the subject discipline - in different settings, contexts and timeframes than have been attempted before

2. Preservation and refinement of existing schools of brand thought, in order to protect their meaning and relevance

3. Updating of brand knowledge, in line with current timeframes and developments during the study

4. Preservation and unearthing of tacit practitioner knowledge, in the interests of providing a legacy of essential knowledge, which could in turn could be of assistance to future academic and practitioner activities

5. Use of a new and refined methods to eliciting brand knowledge

6. Participation of the researcher in the collective pursuit of knowledge.

8.5.2 Literature and background theory

7. Updated literature review and subsequent refinement and reinvestigation of existing schools of brand thought

8. Construction of a new emergent school of thought: *The Cultural Brand Stakeholder*

9. Repositioning and reconciliation of the role of culture in branding and management: as a paradigm of concentric levels of cultural meaning and efficacy

10. Unification of concepts of societal culture; consumer culture; organisational culture; and management culture; linking them together through brand stakeholder interactions

11. Further insight into the phenomenon of brand humanisation processes: what this means, where it appears and why.

8.5.3 Focal theory and conceptual frameworks

12. Introduction of the *Brand Praedicamenta* model – which provides a framework for defining brands according to attributes, stakeholders and interactions

13. Introduction of the *Brand Stakeholder* model – which provides a framework for mapping contractual communications, usage, and levels of influence and responsibility

   o Introduction of the significance of non-consumption stakeholders

   o Introduction of the term *Donership* to define the state of temporary

  brand ownership

   o Presenting the link of branding with supporting disciplines: public relations, advertising, human resource management, and journalism

14. The introduction of Islamic scholarship into marketing theory

15. Introduction of the term *surrogacy* into brand thinking

16. Challenges to historical constructs and definitions of East and West, National identity, and Ethnocentric heritage, which it is argued are abstract and limiting.

8.5.4 Data theory and research methods

17. An outside-in starting point to top-down, bottom-up 'bird view' approaches to the brand cultural school of thought, using inductive-deductive reasoning

18. Introduction of the Delphi method into branding and marketing, in order to gather data and derive applied science meaning

19. In-depth qualitative data analysis through iterated consensus, which presents one phenomenological opinion

20. Investigator triangulation, through consensual subject opinion and experience

21. The use of word-cloud software to support the analysis of data and codes in grounded theory

22. Championing practitioner elicited guidance on the necessary skills and attributes of modern-day brand managers; and theory building

23. Surveying expert academics and practitioners together, to address common observations and postulations of an academic/practitioner divide

24. The treatment of professionals as both professionals and consumers within one data set

25. Laddered biographical data questions, which appraise experience and suitability according to: years; qualifications; number of historical positions held; number of brands worked on; social and cultural experiences. These are then judged through ethno/religious heritage;

ethnocentric social networks; languages; and countries of work and residence. This is a departure from traditional linear approaches, which ask: current job title; place of residence; years of experience; and ethnicity.

8.6 Implications for theory

Stakeholder analysis and the importance of social network analysis have been highlighted as being important when understanding brands. This blurs the line between marketers and consumers. This is in line with literature observations, which highlight the significant role of the consumer. In addition it charts a movement towards task and role, not necessarily according to title. Recent consumer practices of providing user generated content, hauling, and blogging point towards consumers defining their own roles, which may in places diminish those of recognised professionals. Theories therefore have to ground observations within qualifiers of: causes, consequences, context, and conditions – due to increased market and human complexity.

Furthermore, as brands have become more human – theoretical frameworks have to mirror how society judges humans, in comparable depth.

8.7 Implications for practitioners

The Delphi instrument could be used by practitioners in work settings to bridge the perceived gap between theory and practice. Furthermore, it would allow for theory personalisation according to the organisation, which could in addition preserve tacit knowledge and increase knowledge value. To this end brand Delphi studies could run annually, in the same way that staff appraisals do. This would help brand managers to make more accurate evidence-based future decisions and predictions.

8.8 Limitations

Upon reflection, whilst undertaking the doctoral study, it is conceded that there are limitations. The following are considered to be the most significant:

8.8.1 Limitations inherent in the method

- Qualitative Delphi methods only allow for small sample sizes, which raises issues of generalizability

- The expert Delphi study required high levels of participant engagement and intellectual aptitude, which may not always be possible when attempting to replicate studies

- Delphi studies are time-consuming and labour intensive, due to the number of rounds and volume of data generated, which may also make their replication problematic

- The risk of participants dropping out of subsequent iterative rounds is great

- The number of rounds needed to arrive at consensus cannot be predicted. Therefore, timing the predictive length of studies can raise issues

- Iterations and anonymity allow for more accurate and candid opinions. However these are assumed of all, when this may only be the case for some

- In-depth qualitative expert Delphi studies exact a high level of language proficiency of the researcher

- Open ended Delphi and biographical questions may make the reduction and grouping of data problematic

8.8.2 Limitations present in the research process

- This Delphi study required high levels of researcher engagement with participants. Therefore, it is questionable whether all researchers can execute such an approach. The study was found to reply upon the fact that the researcher had accomplished professional socialisation and motivational skills, linked with being able to demonstrate personal standing – in order to maintain levels of participation and trust

- Due to high-levels of researcher engagement with participants and data, it is possible that the researcher's fingerprints may smudge or colour the intellectual fingerprints of participants

- Doctoral study is a timed process. This places pressures on the need to collect, analyse and present data within a specific period - which may bias depth of analysis, findings, knowledge and understanding

- As there appear to be no comparable studies published in branding, or using the Delphi method: championing such an approach, and especially as a doctoral thesis, faced challenges from peers. Therefore, taking such a decision was considered to be a risk, albeit calculated. This was a key-driving factor for why the researcher sought to publish widely and in particular to publish a Delphi study, used as a pilot.

8.9 Further research suggestions

Upon reflection the researcher has considered three future research studies, using the doctoral Delphi study findings as a platform for shaping further discoveries:

1. Quantitative factor or conjoint analysis, which seek to develop more prescriptive factors associated with the brand praedicamenta and brand stakeholder models. Here, brand data would be examined according to

industry sector, market position, and brand. Sample audiences could comprise of one, some, or all of the following: brand practitioners, consumers, and non-consuming stakeholders

2. Quantitative factor or conjoint analysis, which seek to develop more prescriptive factors associated with the recruitment, selection, training and development of brand managers. Sample audiences could comprise of one, some, or all of the following: recruitment consultants, human resource management professionals, management trainers, heads and directors of branding

3. Qualitative Delphi study, which focuses on the views of published academics, and publishing staff in the field. Country of origin and cultural aspects would be gathered to further examine: why gaps in literature may be present; and why there are national/cultural lags in academic consumption and production.

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Appendix 1: Relevant publications

[During doctoral study 2009-2011]

Blind refereed Academic Journals

1. Wilson, J.A.J. & Liu, J. (Accepted, 2011), "Surrogate Brands - The pull to adopt and create hybrid identities - via sports merchandise", *International Journal of Sport Management and Marketing.*

2. Wilson, J.A.J. (2011), "New-School Brand Creation and Creativity – lessons from Hip-Hop and the Global Branded Generation", *Journal of Brand Management,* Vol.19 Issue 2, Oct/Nov, pp.91-111.

3. Wilson, J.A.J. & Morgan, J.E. (2011), "Friends or Freeloaders? Encouraging Brand Conscience and introducing the concept of emotion-based consumer loss mitigation", *Journal of Brand Management,* Vol.18 No.9, Aug, pp.659-676.

4. Wilson, J.A.J. (2010), "When in Britain, do as the British do – if anyone knows that that means. Multiculturalism in a 'British' university business school", *Multicultural Education and Technology Journal,* Vol.4 Issue 4, pp.220-233.

5. Wilson, J.A.J. & Liu, J. (2009), "The Polytheism of Branding: Evaluating brands through their Worship", in Nafees, L., Krishnan, O. and Gore, T. (Eds.), *Brand Research,* Macmillan Publishers India Ltd., New Delhi, pp.207-229.

6. Wilson, J.A.J. & Liu, J. (2009), " 'The Pinocchio Effect' – when managing the Brand Creation process, across cultures", *TMC Academic Journal,* Vol. 4(1), pp.45-58.

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7. Wilson, J.A.J., "The Brand Stakeholder Approach – Broad and Narrow-based views to managing consumer-centric brands", [Chapter], in (2011), *Branding and Sustainable Competitive Advantage: Building Virtual Presence",* Ed. Kapoor, A. and Kulshrestha, C., Hershey, PA: IGI Global.

Blind refereed conference papers

8. Wilson, J.A.J. & Liu, J. (2011), "Investigating the 'Goldilocks Phenomenon' in Branding: What Size and What Place?", *MIICEMA 2011 Malaysia-Indonesia Conference on Economics, Management & Accounting,* 13th-14th Oct., University of Bengkulu, Indonesia.

9. Wilson, J.A.J. (2011), "Mapping cultural change and engineering consent – through social networks and identifying key stakeholders", *The Sixth International Symposium on Public Relations*, 11th-12th January 2011,Tehran, Iran.

10. Wilson, J.A.J. & Morgan, J.E. (2010), "Friends or Freeloaders? To what degree should brands and consumers entertain the concept of mitigating losses, when relations sour?", *1st International Colloquium on the Consumer-Brand Relationship,* April 23rd–24th, Orlando, USA.

11. Wilson, J.A.J. & Fan, Y. (2010), "Examining the role of external brand stakeholders – a classification through communication mapping", *6th Thought Leaders International Conference in Brand Management*, April 18th–20th , Lugano, Switzerland.

12. Wilson, J.A.J. (2010), "Branding to the Hip-Hop generation", *6th International Colloquium – Academy of Marketing Brand, Identity and Reputation Special Interest Group*, 9th-11th April, ESADE Business School, Barcelona, Spain.

13. Wilson, J.A.J. & Liu, J. (2010), "The Polytheism of Branding: Evaluating brands through their Worship", *ICBM 2010 Second International Conference on Brand Management,* Jan. 8th & 9th, Institute of Management Technology (IMT), Ghaziabad, India.

14. Wilson, J.A.J., Liu, J. & Fan, Y. (2009), "Surrogate Brands - The pull to adopt an 'Other' nation; via sports merchandise", *Academy of Marketing Annual Conference*, July 7th-9th, Leeds Metropolitan University, UK.

Appendix 2:
Supporting research methods

Figure 1 Supporting methods and techniques mapped to main research method

From the pyramid it becomes clear that Grounded Theory occupies the position of both an underpinning method and technique. Furthermore, its definition has been refined - fine-tuning it into 5 levels of knowledge extraction:

1. Traditional Grounded Theory
2. Intuitive Inquiry
3. Ethnographic Nonlinear Dynamic Systems
4. Situation Analysis
5. Folkbiology

It has already been discussed that the Socratic elenchus method offers the link between grounded theory and the Delphi Technique. The Socratic elenchus draws from underpinning ideals articulated within:

1. *Watercooler Logic* participatory ethnography
2. Appreciative Inquiry
3. Social Simulations meta-language

The following section discusses the details governing the stated techniques and articulates both their collective and individual merits.

Intuitive Inquiry

Intuitive Inquiry was used for galavising the governing midset when approaching the whole research process. It impresses the importance of research being something which the researcher undertakes from the start of their doctoral journey. Therefore, all thoughts, feelings and notes permeate and nourish the everyday life of the researcher - even outside of formal research. It is argued that it is almost impossible to 'swith off' completely from doctoral studies and so the researcher was constantly processing, consiously and unconsiously, in everyday life and even sleep. With this assimption, the researcher felt that carrying a notebook at all times was crucial - even when relaxing, being out and about and watching televsion. Anecdotally, it was observed that often some of the most significant findings and moments of epiphany occurred when reflecting on the real world, for example: everyday enounters with individuals (planned and by chance); behaving as a consumer; debating with students and colleagues; reading newspapers; and also watching the news and documentaries.

More formally, (Anderson, 1998, 2000) states that at the outset, the intuitive researcher should initially identify their own values and assumptions, through the active and connected engagement with the experience studied. Following this, Intuitive Inquiry invites research participants to speak from their own unique and personal perspectives, born from their own experiences. The researcher's values and assumptions are used to explore and analyse the similar experiences of others – as a hermeneutic lens, culminating in a hermeneutic cycle. Therefore, rather than bracketing the researcher's values and assumptions, as in more conventional phenomenological approaches to research, Intuitive Inquiry begins an interpretive cycle of five iterative analyses:

1. Texts and images are collected that repeatedly attract by the researcher and are related to the area of interest, in a general, often obscure and non-obvious way. The researcher then engages with this material daily, recording both objective and subjective impressions, which range from: Thoughts, ideas, daydreams, conversations, impressions and intuitions. A stream of consciousness is maintained, which is manifest in visual, auditory, kinaesthetic and proprioceptive (a felt sense) states.

2. The researcher then reflects on their own understanding of the topic, considering selected literature reviews, culminating in an unambiguous list of interpretive lenses. Again levels of engagement are on a daily basis, in order to maintain elevated awareness surrounding the topic. From this, the researcher begins to note consistent patterns and clusters of ideas. This process of iterative self-reflection leads to a reorganising, refining, combining, and shortening of clusters. The lenses describe the researcher's pre understanding prior to collecting data and equip them with the ability to predict emerging patterns.

3. The researcher
   a. Identifies the best source of data for the research topic
   b. Develops criteria for the selection of research informants
   c. Collects the data
   d. Prepares summary reports, which are as descriptive as possible
4. The researcher interprets the data, modifying, refuting, removing, reorganising and expanding their understanding of the research topic – by refining their pre-understandings, through the incorporation of the experiences of others. A key feature of Intuitive Inquiry is interpreting intuitive breakthroughs and illuminating moments - where data begins to take shape into a view. In addition, patterns will be revealed, with each fresh set of information.
5. The researcher steps back from the entire research process and draws a larger hermeneutic cycle around the hermeneutic circle, prescribed by forward and return arcs of the iterative study.

Intuitive Inquiry offers a detailed structure as to how memoing can be undertaken as a research instrument, and a means of encouraging coding and theory building.

Ethnography as a Non-linear Dynamic System

In tandem with *Intuitive Inquiry,* (Agar, 2004, 2008) observes the increasingly dynamic dimensions and series of relationships associated with theory and practice. In response to this subsequent growth in complexity within the social sciences, which both challenges researchers and draws them towards increasingly reciprocal frameworks based on complexity; these raises a debate as to whether studies should be more about evaluating 'fitness', rather than qualitative versus quantitative methods. In light of this, (Agar, 2004) (Agar, 2008) argues for ethnography being viewed as a kind of logic, rather than a unit of study - which therefore necessitates a general framework for ethnographic research as a complex adaptive system (CAS). His model involves the following steps:

- Clarify indicator-based problems: Definitions are based upon quantifiable terms

- Location of actual tasks that indicators are meant to measure, and the people involved

- Fieldwork on those tasks, using iterative recursive abductive (IRA) logic and context/meaning (C/M) questions. From these, surprises are evaluated and new concepts are created to account for them, rather than considering these occurrences as deviant or 'errors'. Furthermore, these account for multiple perspectives and interpretations, common in human social research, subject to the way in which participants 'translate' meanings and situations.

- Analyse data for replicative patterns; whose dynamics explain the movement of the indicator. These then yield leverage points, upon which actions and changes can bring improvement.

- Further analysing of task variation, having identified leverage points. Leverage points represent positive deviant cases, where individuals' practices enable them to find better solutions to problems. From this, leverage points can be further evaluated for their optimisation, as part of problem solving.

- Looping back to the beginning, with refined indicators, in order to address the same problem – through experimentation, variations and modifications. This approach draws from transformative participatory action research, based upon appreciative enquiry (Cooperrider and Srivasta, 1987; Cooperrider and Whitney, 2005; Avital, Boland, and Cooperrider, 2008; Schein, 2004)

Here, Agar (2004, 2008), illustrates how coding can accommodate dynamism and the complexity of real world problems and phenomena.

Situational Analysis

(Clarke, 2005) supplements and enriches basic Grounded Theory, with a constructivist approach, which includes analysis of the full situation – drawing from: interactions, interrelationships, interview data, ethnographic data, discourses, narratives, visuals and historical contexts. The argument she presents is that whilst grounded theory was around the postmodern turn, in many ways it is not particularly so well equipped to address fundamental issues. Rather than the conventional approach used in management and marketing, the (Clarke, 2005) approach introduces other qualitative research methods, including those from: feminist theory, interactionist theory, Foucault's philosophical underpinnings and her personal experiences under the studentship Anselm Strauss [the co-developer of grounded theory, with Barney Glaser] . These she has applied to research in cultural studies, medicine, science and technology. Using (Clarke, 2005) approach to situational analysis, the researcher looks to preserve and map as much data as possible using heuristic evaluations, when analysing complex situations of enquiry - in order to derive a broad-based approach to addressing the research question. These in tandem embed methods of data analysis into the frameworks presented by (Agar, 2004, Agar, 2008) [Nonlinear dynamic systems] (Ross, 2008) [Folkbiology].

(Clarke, 2005) offers three main cartographic approaches, as supplementary approaches to traditional grounded theory [Anselm Strauss' framework: social words / arenas / negotiations / discourse], in order to shift attention to the situation of inquiry.

1. **Situation maps**: working against simplifications characterised by usual scientific work. The intention is to discuss the complexities of the situation in dense relations and permutations. Therefore, the maps are designed to capture and provoke analysis of relations, between major human, nonhuman, discursive, historical, symbolic, cultural and political elements.

2. **Social worlds/arenas maps**: which lay out the collective actors, key nonhuman elements and arenas of continued commitment and

negotiations. Boundaries are open and porous - due to negotiations constantly constructing and destabilising social words/arenas maps, in a postmodern paradigm.

3. **Positional maps**: that lay out the major positions taken, and not taken – providing axes of difference, concern and controversy. Therefore, complexities are seen to be heterogeneous and improved through continued investigation.

Folkbiology

Folkbiology offered a multidisciplinary approach, which combines anthropology with cognitive sciences, when considering culture as an emerging product (Ross, 2008). The argument being that the thoughts of participants cannot be separated from how they think. (Ross, 2008) asserts that anthropology and cognitive sciences in isolation produce unsatisfactory 'science'. The ethnographic and experimental approach of Folkbiology guides the researcher towards considering how views are formed, transmitted and transformed through the following factors:

Social influences:

- Social and expertise networks (Kinship, Friendship, Physical Distance, Power, Influence, Legitimacy)

- Learning strategies

Cognitive mental representations – theoretical frameworks

- Categorisation

- Knowledge acquisition processes

The research method uses several evaluative processes, which for the purposes of this research have been narrowed down and adapted to the following:

- GIS Based Spatial Analyses, using Word Cloud software (Wordle.net) (Cidell, 2010)

- Social Network Analyses, through brand affiliations

- Cultural Consensus Modelling

- Analysis of Residual Agreement

The distributions of representations offer an idea into the role that social factors play, when examining conceptual and cultural changes.

Social Simulations Meta-Language

Through blending network analysis and semiotic analysis (Süerdem, 2009) produces network measures using qualitative data, to arrive at indicators such as: knowledge domains, modality, paradigms and paradigm shifts. A thematic analysis was used to identify concepts, which then proceeds towards the creation of a matrix, in the form of a cognitive semiotic map. The aim was to analyse the

didactic relationship between concepts, presenting the mental map behind texts, in order to describe phenomena. This interpretive approach to identifying meaning is kept at paragraph level, leaving pattern recognition to the network analysis. Each paragraph is considered a statement connecting two concepts, according to sentence structures which use phrases such as: 'refers to', 'is', 'signifies', 'makes', 'suggests', 'is in opposition to'. Discourses as judged according to proximity, frequency and terms of reference (positive and negative).

Water Cooler Logic: Participatory Ethnography at Work

(Darrouzet, Wild, and Wilkinson, 2008) refer to the use of ethnographic methods for (1) understanding communities via exemplary situations, and (2) the participation of shared communities, which activates residual social relations and social capital. They also hold individuals to possess an ethnographic consciousness, provoked by the complexity of the social field that surrounds them. However, they assert that individuals are often lacking the stage and context to articulate their insights, and are frequently prevented from joining individual insights into a meaningful whole. In response to these observations, the Expert Delphi seeks to address these through a reflective iterative process, which encourages the elicitation and sharing of collective knowledge.

Water Cooler Logic (WCL) rejects traditional experimental design, in favour of an open systems/complex systems approach to the field of study, which considers proximity to problems. Participants are given basic instruction in ethnography and are encouraged to identify 'ethnographic moments'. This combines fields of knowledge and leads participants towards conceptual macro vantage point perspectives. In addition, it empowers participants, drawing them into the research problem, as ethnographic authorities. This is held especially of importance in this research, due to the calibre of the participants selected; and in order extract as much of their knowledge and experience as possible, whilst preserving motivational factors associated with engagement. (Darrouzet, Wild, & Wilkinson, 2008) state that the method cannot be separated from the process, in comparison to conventional data methods: which analyse interviews and discourses at a meta-level. Furthermore, they recommend (1) participant anonymity and confidentiality, and (2) the avoidance of presenting raw data to participants.

Appreciative Inquiry

(Cooperrider & Srivasta, 1987) argue for a multidimensional view of action research, based upon a 'sociorationalist' view of science - which sees problem-solving constraining imagination and contribution to knowledge. Therefore, good theory may be one of the best means for humans to affect change; by which the best of *what is,* is used to identify *what could be.* This usage of a 'positive lens' extends position of Generative Theory (Gergen, 1978), which asserts that many assumptions of positivism cannot be applied successfully to studying human systems. Instead, the aim should be to challenge guiding assumptions of culture - to raise fundamental questions regarding contemporary social life, challenging

that which is often taken for granted. However, whilst studies remain scarce and discussions concerning its formulation as a research methodology (Bushe, 2007), its usage is of particular applicability to stakeholder analysis, and addressing questions that motivate researchers.

From this, Appreciative Inquiry styles interview guides, to focus on gathering 'the best of stories', regarding phenomena of interest, due to their above normal capacity to be generative. Through the encouragement of capturing tacit dialogue, ideas and opinions are categorised - on the basis that these narratives will lend themselves towards the development of theories and models of best practice (Cooperrider & Whitney, 2005) (Bushe & Kassam, 2005).

Appendix 3:
Delphi Study Final Round Narrative

Theme One: Brands

The American Marketing Association (1960) defines a brand as: "A name, term, sign, symbol, or design, or combination of them which is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors."

Brand Channel (2009) defines brands as being, "a mixture of attributes, tangible and intangible, symbolised in a trademark, which, if managed properly, creates value and influence."

Professor Abraham Koshy (2010) talks of a brand being (1) the offspring of an organization's leadership, (2) constituting a promise given to consumers, (3) an 'affordable luxury', and (4) offering 'mass prestige'.

1. What would you add and/or amend about these definitions? Also, do the same rules govern all brands, in all segments?

2. In light of academic discussions, which consider aspects of a brand's DNA, identity, personality, image and influence; how do you differentiate between successful, mediocre and poor brands? And following this point, what would you suggest brands need in order to improve?

3. It is debated whether it is possible to reflect upon enough of the intangible components of a brand within brand evaluations. How do you measure the value of a brand and what other steps could be taken to improve these calculations?

Defining Brands, evaluating and calculating, their performance

1.1 Defining brands

A Brand is a visual, aural and verbal encapsulation of the differentiating characteristics consumers attribute to that particular product or service. Brands are defined first and foremost by their personality, which is then transferred onto the company, product and user. It can be argued that a brand has a human-like existence, which in successful cases is reflective of skill, image, traditions, intelligence, heritage and national pride. Brands have true essence, meaning, value, soul and emotion. i.e. they define small elements of a life and drive aspiration. *Facebook* and *Twitter* are free, *Jack Wills* has been able to make kids feel unique yet want to be part of the wider 'club'.

Recently, more brands also appear to link themselves closely to design and designers. Therefore, brands have a cultural context, which evokes emotional and cognitive attachments, that guide our behaviour - and these bring brands to life. The intangible aspects of a brand are significant and allow them to be multi-dimensional – so that they mean different things to different people, all at the same time. Also, these things can be held as universal laws, which shape and affect all brands.

Koshy's (2010) assertions that brands are affordable luxuries, which offer mass prestige, are not supported by the panel. Furthermore, the panel seems to feel that brands are much more than logos, or trade marks: they have an identity which links them to an organisation and socialisation process which aims to communicate promises and values. So, brands have a cultural, social and political persona, which may be communicated, but could also be perceived as such by interested parties. Therefore, in many ways brands can be judged in a similar fashion to human beings.

1.2 Brand evaluations

A company and/or brand will always be valued on future potential revenues as this is the basis of Net Present Value. Hence link to share price for brands. If you have loyalty you will keep buying. Successful brands should be able to demonstrate strong, clear and consistent links with the function of their product/service. These have to be truthful, authentic, emotive and credible promises, which also indicate differentiation and benefit. This process has to be built up over time and needs to be communicated to consumers and stakeholders – hopefully leading to perceived reliability, desirability and value; and ultimately an uplift in additional revenue. Whilst defining a brand is more than sales, 'top' 'successful' 'premium' 'cult' 'memorable' 'cool' 'attractive' brands all share a commonality of a nub of timelessness – through an emotional element which should not be overlooked. This suggests that successful brands have strength of character, which makes them stand out from the crowd. This requires visionary management, with a clear and qualified understanding of consumers' needs and motivators; and reliable quality customer and competitor research. This process helps successful brands embed themselves into a network of interconnected bonds and experiences, which prevent them for being replaced, or thrown away. This does not however create a precedent for what defines a 'successful brand' - as this can only be defined by the brand itself and the subsequent perceptions of others. Furthermore, brands cannot remain static – they have to innovate and respond, whilst maintaining a sense of heritage and permanence.

Brands that have the highest unaided recall and high sales from markets, other than the country of origin, are considered to be successful. Brands that fare well on aided recall and register average sales are mediocre. Brands that fail to create an impact on the minds of people, or influence consumer purchases are poor. Brands have often been classified to follow a one-way communication from the company to the target audience. However, today's markets demand co-creation - and brands that have shown high share of mind, heart and wallet are those that initiate a dialogue between the company and the target audience.

Attributes	Brand Score Card		
	Successful	Mediocre	Poor
DNA	Strongly articulated	Articulated, inconsistently	Not articulated well at all. Consumers don't have a clue.
Identity	Clearly defined	Poorly defined	Not defined
Personality	Single	Multiple	Too many around
Image	Consistent across the world, across time	Image at the mercy of brand manager's whims and at cross purposes with the brand core	Image changes with market needs
Influence	Influences the prospect in a consistent manner	Diffused influence spectrum	Doesn't really know, who, where and how of the influencing process

Personally I feel that there is a lot of overlap between the attributes in the Brand scorecard. Also, there is not much about B2B brands and how they relate to typical B2C brands. One example could be Intel, which also contributes to increasing the financial value of its global customers (typical B2C companies). Also with B2B branding you will experience more rational buying criteria on the (direct) customer side.

However, I just wonder, in the case of a 'genius' creating a successful brand almost over night, how would you analyse it? Furthermore, there is an argument to say that this is all old, old thinking. "First and foremost" personality – BAH! Function? Decision process is more emotional than rational, so function is only 25-30% of decision process. Unaided recall? Give me a break! Everyone knew *GM* and they went bankrupt.

1.3 Brand calculations

With these observations in mind, evaluating a brand's performance and calculating its value, is complicated and fragile – tending towards the subjective, rather than the objective: 'your brand is only worth as much as someone is prepared to pay'. The challenge lies in the identification of variables and codification of tacit knowledge. Furthermore, there are big differences concerning the purpose of the calculation, from whose perspective and how it will be used. For example, if the brand is being sold, or stock prices are being calculated, these could yield completely different values to the value to employees – from a motivational perspective. Also, most likely selling and buying prices are completely different. So these also subject to context, perception at the time, and future framing of strategies. The use of "brand equity" is loose and not targeted or descriptive of what equity is in today's marketplace!

Most frequently, brands are evaluated in the context of specific campaigns, which serve an additional purpose of driving longer-term brand value. They are

measured in economic terms i.e. revenue generation. This is done via bespoke audience research (which is very expensive, so tends to be done infrequently). These calculations are then used as a health-check for channel brands, and on a more ad hoc basis for programme brands, as necessary. In addition, viewing figures and audience appreciation indices are used, although there are debates as to whether these have more to do with sales, rather than brand value. However, the value of the brand in the mind of consumer must also be factored in: through research to evaluate brand loyalty and the relationship the consumer has with the brand - from acknowledgment or knowledge of the brand, through to a strong preference for that brand over others in the market. Effective measurements of brand value should therefore be a combination of the financial contribution the brand makes to the organisations, alongside regular consumer research on the worth of brand to the consumers, in terms of: loyalty, appreciation, awareness and desirability.

Nowadays, it is a seemingly frequent occurrence to find a brand's value being quantified and monetised, but with no realistic intention of sale. Paradoxically, we often see brands sell for much beyond the anticipated sale price – a common occurrence in brand valuations when the industry/sector it operates in is clearly new, misunderstood, or both. A fine example of this is the dot.com era – where new brands were constantly being valued and sold for amounts that were based purely on potential and not bottom line.

Whilst actual sales and profit/loss accounts can give perhaps the clearest cut and conclusive insight into a brands real monetary value, there is an obvious argument for us to incorporate the element of intangible brand assets and firm/customer based brand equity. We must however be sceptical and realistic when assessing this, and keep 'in mind's eye' the notion that often a brand's intangible assets can be the most vulnerable and susceptible to change (within reason).

Companies or products with the strongest equity tend to be those with the highest market share and profits. A sure sign of high brand equity within a certain category is the use of a brand name to define all products of a certain type. For example, referring to any paper tissue as a *Kleenex* demonstrates the high brand equity of this product in the paper tissue category. Brand extensions, or the launch of a product in a new category, by using the name of a high equity brand, are also a common method of leveraging the high equity of the brand.

Corporate branding and Product branding also seem to be mixed up in places. In many cases we have seen the life of brand is beyond the existence of a company - e.g.: *Pan Am* or Lehman Brothers. The brand equity is so powerful that it diminishes very slowly for accepted brands. The reactions on definition can be broadly classified under structural and functional approaches to branding. Brand valuation is more appropriate than Brand calculation.

In the not so distant future, having observed recent notable examples of crises, brands will also have to evaluated on: Societal goodwill; Environmental impact; Transparency; How they make the community of users, potential users, non users feel about themselves.

Theme Two: Brand Management

1. What education, experience, skills and competences should brand managers have and what from your experience tends to be the norm?

2. Consider who is involved in the management of a brand and the parties, inside and outside of an organisation, that are able to exercise control. Also, as brands are seen to possess their own human-like attributes; what are your views on whether brands are defined by their consumer segments and wider stakeholders - or alternatively is it brands and managers that are shaping the agenda?

3. Is there any difference between how brand managers and brand consumers perceive their ability and legitimacy to influence the behaviour of a brand?

The current landscape and skill competences required when managing brands; and more specifically an appraisal of the relationship between professionals and consumers

2.1 Brand Manager pedigree

Brand Managers are guardians of the essence of the brand and they have to understand how their product adds value to the lives of the buyers. This is true for consumer and industrial brands. No point having someone who knows the mechanics of getting a brand out there via channels, if he does not have a message that shows he understands the customer.

Marketing background: Brand Managers are people who have risen within the hierarchy of marketing departments, usually from sales. However, it is possible that some industries, such as video games, may resist appointing brand managers from sales, for historical reasons. It is argued that the competencies required for sales and marketing are very different. Brand managers should also be sensitive to media and PR - with a clear understanding of political context. Basic Graduation can be any subject, with at least 5 to 10 years of working experience. In some respects however, formal education is of less importance than experience, skills and competencies. Education above degree level is of course still desirable, but not necessarily a prerequisite. However, it is difficult to find people with all these skills - like a Professional with a Post-graduate degree in Management.

The norm in some of the participants' markets: Engineer—MBA—Brand Manager. 'What a waste of time, energy and the CFO's money.'

Useful education: Social sciences, literature, films, art, theatre, music. Let's all remember communication channels change faster than the schooling system can change curricula. Brand Managers should have a blend of science and arts in their education, should use the left and right part of the brain equally, should have diagnostic skills for the consumer's preferences. However, care should be

taken with the left/right brain categorisation, as this is highly contentious. Finally, Brand Managers should not be guided by quarterly sales targets.

2.2 Essential Skills and Competences Required

- Specific industry or market know-how

- Ability to research consumer markets and monitor market trends

- Analyse the pricing of products and analysing the potential profitability

- Exploring new ways to communicate with customers

- Generating names for new and existing products and services and coming up with packaging designs

- Scheduling

- Overseeing the production of TV, newspaper and magazine adverts

- Liaising with art designers, copywriters, media buyers and printers

- Ensuring the designs and messages in marketing literature and campaigns meet the company brand and regulatory guidelines

- Monitoring consumer reactions through focus groups and market research.

- Brand managers should

- Have an instinctive feeling about future product concepts

- Have strong marketing skills and knowledge

- Be creative, entrepreneurial thinkers

- Have excellent communication and listening skills enjoy working in a deadline-driven, creative environment

- Competency in qualitative data management and marketing imagination.

Significant and direct exposure to consumers' habits, attitudes, brand perceptions and lifestyles. Following this – the ability to analyse consumer knowledge and boil it down to the key insight, which will help craft strong brands and tap into unmet needs.

Experience with having developed and implemented 360-degree communication plans for Brands. This is the arena in which a brand comes alive and talks to its consumers and the ability to develop a succinct and effective verbal and visual vocabulary for a brand is crucial.

Strong analytical ability to understand nuances of different markets and put into play different marketing strategies relevant to them. Should be clear

communicators with strong creative and strategic sensibilities. 'People people'. Good forward planning skills and transformational leadership qualities.

Those that make the leap from brand exec to manager tend to have a bit more focus about them, the long-game – so they already have their eye on the skills they'll need to get to the next rung: leadership, strategy on the bigger channel and involvement in super-brands.

The skill set or characteristics of a good brand manager are similar to that of most roles within the advertising/marketing communications/public relations/brand spectrum: organised, ability to think strategically and tactically, understanding the brand's heritage, its understanding of the world and who are its stakeholders. Above all, a good brand manager has the vision to know where the brand is positioned against its direct and indirect competitors, where it needs to be to move forward and progress, and how to achieve this – with the cohesion and support of his/her staff and peers.

Brand managers need to understand society, consumer, the little triggers that lead to the big purchase. Selling is still an art bolstered by process-oriented science. Ewaneck of *Hyundai* tapped into the basic emotion of insecurity of the consumers in the recession ravaged American market. *Hyundai Assurance* became one of the most talked about initiatives from the automaker in decades. Ewaneck studied emotions not just spread sheets.

Competence: Can the person observe life going by the cafe as she or he sits inside? Can the person draw a mental reasonagram as to why the pretty lady who wants to own a Vuitton would like to wait till the next saison de soldes?

Overall, today you need strategic thinkers more than anything. Also, it's worth considering that many brand managers have virtually no training in research even thought it is high up the list. Managers need to look at category Ideal through the eyes of consumers, who are getting information from platforms not controlled by brand. The Brand Manger needs to be anchored firmly in the cultural context in which the brand operates. Ewaneck of *Hyundai*, USA understood the deep sense of financial insecurity sweeping the country and led the creation of a campaign that allayed that fear. What a marvellous fit between the societal needs and a brand's raison d'etre. I don't think any business school curriculum would have taught him that.

2.3 Consumer-Brand Manager interplay

Whilst the top down approach is in vogue, with brand managers shaping the agenda – it can be argued that this is disastrous. Because, in the absence of wider stakeholder consultation, there remains the potential for serious errors of judgment. Furthermore, brand managers do not have control over the uninformed Brand image and can only focus in the main on the informed brand image.

Obviously though, several companies have the ability to follow the resource-based view to great effect (the company managers determining the agenda) – e.g. *Apple* and *Bang & Olufsen*, who are not involving the consumers in focus group discussion etc., simply because traditional consumers cannot imagine what

would be future brand successes. However, most companies enjoy their brand successes by involving the customer segments (the market-based view).

I think we are seeing examples where the brand is not created then sold - but that it the brand is created and owned by the consumers themselves. Will the *King of Shaves* brand talk about 'Digital dialogue' with customers rather than 'Brand broadcast'? *IBM* and *IIT* in India went out on the street/villages in India to realise that not everyone has access to a screen that has a web page in English. They created the 'spoken web' so that people with mobile phones could interact. Instead of websites we have voice sites.

A brand is ultimately created in a specific consumer and cultural context. All successful brands need to keep up with the times and remain relevant to their consumer base as they grow older or younger or shift geographies. In general for a successful brand, it is a two way street of brand influencing consumer and vice versa.

More specifically though for market leader brands in mass-market categories, consumers tend to drive the agenda and brands largely make sure they remain at the centre of the consumer agenda. On the other hand, smaller challenger brands or brands in more niche categories would tend to identify future trends and lead the market and consumers.

As for a definitive framework and observation, both consumer and stakeholder influence is necessary. It is a process of osmosis and also how the brand portfolio fits together. It is up to the brand manager to juggle the brand's core purpose with the influences of the consumers and the stakeholders (if they deviate from that core purpose) - to deliver a long-term brand strategy that preserves integrity and success in equal measures. Management of the brand, in terms of positioning, does start from within the organisation and how they are presented and marketed to the consumer. However ultimately it is consumer perception and attitudes, which defines the brand. This is a result of how the brand is presented, performs, and also the subjective nature of consumer opinions.

In a fast moving consumer goods context, which is driven by one-way communication primarily on mass media, brand managers would perceive themselves as having a more direct control and legitimacy to control the behaviour of a brand. Consumers of these categories would see themselves as having less control. The main tool of control would the ability to walk away from a brand and switch to using another one. But the absence of conversation between consumer and brand manager would create an imbalance of perceived control in favour of the manager.

Focus group is a technique used in qualitative marketing research rather than separating the two. Consumer Brand manager interplay has come out well. The differentiation of Resource based or Consumer based approach is also within the framework of a particular context. The inter-linkages between ideas have scope for improvement.

In service industries though because there is a stronger personal link between the consumer and the company/person that manages the brand, consumer would perceive themselves as having more direct control on a brand. In this scenario the interaction with consumer could be quite empowering for brand managers as

well leading to a balance between consumer and brand manager in terms of control and influence on the brand.

In recent times though the evolution of digitally marketed brands and the huge and increasing influence of social marketing has lead to the creation of 'consumer citizen brands' or brands which represent a consumer movement. NGOs or Disaster appeals or large-scale events are an example of such brands -which is organically created through the involvement of the people who support and consume them. The perceived influence of consumer over brand manager would be most in favour of consumers in this case.

To conclude, this is a difficult are as there are two elements to consider. Firstly brands dictate to a certain extent their own agenda – they decide what messages to put into the public space, how they want to be perceived, and what direction they think the brand should be moving in. The counter to this however, is that in the current landscape of social media, online advocacy and the digitally empowered consumer, there is little brands can achieve without the early support and adoption of their customer base. The downside to this is that perhaps this restricts the brand, keeps it from going in new directions, and ultimately places too much power in the hands of the outspoken minority. A balance must be achieved in pleasing those customers/advocates that have helped build the brand, whilst also making the brand appeal to a wider audience and generating new streams of income and profit.

However, it can be argued polemically that brand-to culture interaction can't be compared. Nuanced ethological and psychological measures do allow comparable metrics to be created. But these are difficult - requiring some investment of intellectual capital.

An interesting way of looking at a brand is in the 'Lovemarks' way. It's a proprietary methodology/philosophy used by *Saatchi & Saatchi*. Love by definition is about reciprocity. Therefore, brands with a two-way communication with the consumer, is a loved brand. They are stronger brands. And, it's true that tomorrow's brands would have to be evaluated on: 1) Societal Goodwill, 2) Environmental impact and 3) Transparency.

Theme Three: Culture and Brands

Herskovits (1948) is of the view that culture "is the man-made part of the environment". Smith and Bond (1998) explain that this includes both material objects and social institutions. However, they suggest that it does not help us decide what conceptual units allow us to make cross-cultural comparisons.

1. What would you add and/or amend about this definition. Also what would you use to compare and contrast cultures and how do you do this?

2. It is considered that there exists a relationship between Brands and Culture. How would define this relationship; and do brands govern culture, or do cultures govern brands? What encourages an awareness of brands and culture, and an appetite for both of these?

3. What do you understand by terms such as Brand Surrogacy, Cultural-hybridisation and Ethnocentricity, which observe shifting patterns in thought, emotions and behaviour? How do these phenomena affect brands?

Investigating the co-relationship and of impact Branding and Culture as a phenomenon. And, following this, a review of new and emerging terms - looking to capture significant emerging trends, within this paradigm

3.1 Defining Culture

It is impossible to truly compare one culture against another for several reasons:

Firstly, the term 'culture' needs to be set in the context of one's work. The term 'culture' has different meanings in different settings for example in science, it may mean to cultivate bacteria. In business we usually use 'culture' in two main contexts, *Organisation Culture* and *National Culture*. In OC, I would define culture using learnt behaviour as an example; but for NC I would argue that it has more to do with acceptance and tradition. However, there are many words that have been used to explain the term 'culture' in this context including values, beliefs, norms, attitudes, and aspirations. Personally I am inclined to take the view that 'culture' is both 'process' and 'product' orientated. Process as how we do things and product as the outcome of what we do. This perhaps appear to be more of a symbolism view type as one could argue that it has much to do with thought processes and beliefs.

Therefore I am not sure if I agree with Herskovits' definition as it is taking a 'physical' view of what culture means. Smith and Bonds explanation only seems to indicate that there is more to just a physical state but it may also include a non-physical (touchable) state. I think that as my first encounters with the meaning of culture was about organisations and business, I am inclined to take a view influenced by Hofstede. Hofstede's cultural dimensions are probably the least contentious and could be extended to brand work

Secondly, on the question of cross-culture comparisons, I feel that two dimensions can be measured if you think about culture as 'processes' and 'products'. In the first dimension, you would look at 'how things are done' and map the differences in how things get done assuming you are looking at how similar things are done. For example how brands are registered or developed. This will of course have to be on what can be observed and measured. In the second dimension, one could look at the 'products' or output / outcomes of the process. For example the physical feel and look of a brand. Of course you can measure across a range of attributes such as leadership, organisation structure, motivation, etc.

I would agree that culture is the man made part of the environment and a part that is constantly evolving and organic. A comparison of cultures can never be anything but subjective as one is a product of their own environment, as such one uses their own cultural experiences to compare and contrast other cultures, which is the only way you can truly notice and appreciate the differences.

However this is still very difficult ground. I agree that Hofstede is the least contentious but he is still very contentious and especially so in the way he defines his dimensions, which could be interpreted differently. Asians are supposed to be collective but in many ways are also individualistic – his definitions do not properly capture this quicksilver type changeability etc...

Ogburn & Nimkoff (1940) used cultural lag for comparison. The non-material cultural elements follow the material culture. This was criticized, as many developing nations showed fast movement in non-material aspects of progress irrespective of lag in material objects (Say Education achieved with poorer technology). Most of the companies are based on a Euro-centric approach. Ideal types of modem culture can be created for comparison.

Bates and Plog's (1990) definition: "A culture is the system of shared beliefs, values, customs, behaviours, and artefacts that the members of society use to cope with their world and with one another, and that are transmitted from generation to generation through learning"

Another beautiful definition of culture however is this one: "Culture is the sum of all the forms of art, of love and of thought, which, in the course of centuries, have enabled man to be less enslaved" (The French author André Malraux).

3.2 Making sense of and interpreting culture

Language, faith, food, skin colour and physical features, literature, art and fashion – these are what I look for to compare and contrast. Also, this is something that I largely don't think about consciously. In Japan for example, we still have an image of separate cultures, but living in England makes the same approach more difficult.

Relationship patterns and informal power structures that exist in societies I believe are the most important aspect of cultures that would allow us to make cross-cultural comparisons. This would include familial structures and hierarchies, relationship between genders, power structures in a business or political set up, social stratification systems e.g. caste systems, authoritative

figures (institutional and familial) etc. These human equations would provide the strongest conceptual units to make cultural comparisons. Societal mythologies are a crucial lens or context in which to understand these relationships. As they provide the historical wiring that makes people behave the way they do.

Cultures are rapidly evolving and picking up norms of the other. In this era of convergence, we have to break free of traditional stereotypes. If cultures have to be compared and contrasted, they would have to be situation based. For instance, if you compare the teenage population around the world for music culture, there were maybe uniformity in preferences but if you compare above 50 populations, they would show huge variations. Similarly, you could find similarities in consumption patterns of emerging markets although the external manifestations like the final cooked food and way of dressing may differ.

3.3 The relationship between Brands and Culture

I think this is a very complex issue. Most brands are a product of their culture, whether that is organisational culture (such as *Apple* which has a culture of creativity and innovation) or their wider cultural environment, i.e. the country or continent in which they operate it. Truly successful global brands to some extent transcend this or it defines them and becomes part of their attraction, as 'Western consumer brands'. As such some brands become more attractive because of their cultural connotations. On the flip side brands can influence culture and cultural trends, this is best exemplified through music or social media brands such as *Facebook* and *Twitter*. However, not all brands aim to expand into the global market, because 'they' may decide to remain in a micro market – in order to enjoy 'longevity'. An example of this can be seen with Japanese local rice wine, which could lose its authenticity when it is mass-produced.

A brand is created within a cultural context and in seeking to be continually relevant borrows from its cultural context in the stories, symbols and rituals it creates and perpetrates. A very strong cultural association for a brand to adopt which would be meaningless out of its cultural context.

Quite often though brands can also drive and define culture. Celebrities are perhaps the best example of brands with have the power to set cultural trends.

Brand behaviour is influenced by the culture of the consumers they court, at least initially... for most brands this stays the case at least to start with but there are clearly some brands which have transcended that and are now style-makers in their own right. Very few brands govern culture - that's a big word.

Again, it's an organic relationship with each working on the other. The organic metaphor could be useful as brands grow in power we could liken this to the way that sickness is often when existing bacteria start to get out of balance within a person – they have always co-existed in the body but a particular stimuli / environment allows them to grow and become dominant. We can see the same thing in culture where a particular brand – say coca cola displaces heterogeneity of previous brands

Culture is a story that we all accept. Not always true as culture evolves as people add elements to suit themselves. This is why we have many cultures with sub groups that claim to be taking the culture back to its roots i.e. Fundamentalists believe they have the one true brand/culture and that people have muddied the waters over the years. I spent time in Masai Mara Kenya with a vegetarian Sikh. Apparently, the world believes that all Sikhs must be meat eaters. He didn't like seeing animals slaughtered when he was a kid so it put him off. He stills believes in being Sikh (I'm assuming that religion is a brand).

Brands can also hijack a culture to the extent that 'Hello Kitty' is the national symbol of Japan and the perception of 'Superdry' clothing being actually from Japan, when its more correctly a brand created by Essex man (of which I am one I add!). Brands will always be accepted anywhere as long as owners are honest and offer value.

The distinction of urbanism from urbanization shall throw light to the relationship of brand and culture. Urbanization increases the use of brands and urbanism is a way of life determined mostly by brands.

The mistake many people make is that they believe a brand is made up from advertising. This was true in the old world. But in the new world, where there are a million different ways to experience and influence the behaviour of a brand. There is a billion different ways to advertise, where the fragmented media world is making it more and more difficult to navigate the complexity of a brand. A brand is best thought of as a culture – and there is an interaction both ways.

Culture defines a brand. Could a *Harley* legend have been built in any country other than America? The *Chanel* mystique is the French mystique personified. Take France out of *Chanel* and what would you be left with?

When an artist or a writer depicted culture, he used brands of the time to do so. And that has got engraved in history. That's the relationship that brands and culture share. Brands are a very integral part of the definition of culture and description of an individual's life. Brands and culture influence each other. Take for instance: Salsa influences America and vice versa. Flexibility to adapt to change is something that encourages culture and brands.

Culture determines brands and controls them. They are anchored in tradition, but expand into evolving practices. "I don't consider brands and culture to be part of an appetite – just part of a person's existence"

3.4 Emerging terms, looking to capture phenomena

People are more complicated to define, due to some of the observations listed, which I am assuming these terms are looking to encapsulate, define and clarify. They (people) also appear to be more fickle, prone to switching and even more so when it comes to brand choices and purchases – even when product offerings appear to be identical. Issues of mergers between good brands and bad brands (brand image) should be considered. Branding does not necessarily mean standardisation. It also has the property of exclusion of ordinary consumers.

Brand Surrogacy:

This to me is the phenomenon where brands begin to stand for something more than what they overtly sell or represent. Brand surrogacy is when a brand is "nurtured" outside of its own organisation, on social media sites such as *Facebook*, where a brand can be grown, defended and promoted by advocates (i.e. consumers). The Halal phenomenon as it has moved from the meat industry to practically anything relevant to the Muslim population in Britain is a very good example.

Surrogate Advertisements are seen as negative but surrogate branding is a positive phenomenon. From a different perspective, the line between brand surrogacy and brand extension is fuzzy. One could use the brand name of an alcoholic drink like beer to mineral water, and advertise that product. They argue that this is brand extension, which is using the name of an established brand name on other new products of the company to capitalize on the good will and save promotional expenditure. Further, brand extension could also reduce the time it takes to get the new product accepted in the market. Brand extension is an accepted common practice in marketing

Cultural hybridization:

Is when a brand changes as a result of its cultural environment, which is now more commonplace as a result of globalisation and the global nature of brands. Hybridisation refers to the closed concept of culture and to its opening up – viewing globalisation as hybridisation: structural hybridisation, or the emergence of new, mixed forms of cooperation. The other side of hybridity is transcultural convergence. Culture hybridisation is getting more and more relevant, also for global branding. It is a phenomenon largely driven by second-generation immigrants, in my view this is the coming together of cultural symbols, icons, influences from a culture, which is not mainstream with the wider cultural context in which it has been planted. This is trying to make sense of the multidimensionalism inherent in brands – i.e. different people see them differently – by grouping tendencies to see a brand in one way according to cultural bias – for example the negative group perception of *Barclays* from the liberal cultural centre when they engaged in apartheid South Africa. Ultimately at the centre of the cultural hybridization process is the need of a diverse community to adapt and integrate while retaining a core of their ethnic cultures. The Music and Media industries have probably some of the best examples of how this cultural hybridization can manifest in brands and communication e.g. *MTV Desi, Eastenders.*

Ethnocentricity:

Ethnocentricity is the tendency to believe that one's ethnic or cultural group is centrally important, and that all other groups are measured in relation to one's own. Business managers and marketers, inevitably view the world from the point of view of their own environment. This is called the Self Reference Criteria (SRC). The Internet helps creating global brands and making ethnocentricity less relevant.

Ethnocentricity many times gives higher premium for the brand (like specialised handicrafts of a region). Brands are products of the ethnic context they emanate from. Would *Honda* ever communicate the way *Diesel* apparel does? As globalization has become a widespread reality certain cultures have proven more resistant to change than others. In the face of what is sometimes perceived to be an onslaught from foreign cultures they have crafted a stronger at times more insular definition of their cultures. This gets reflected in their brands, which wish to remain strongly ethnic in their appeal. On the other hand ethnocentricity has also proven to be clever differentiation tool as global brands try to be everything to everyone. Retaining a stronger allegiance to a particular local culture brands are able to retain a more consistent and well defined brand image, which is ethnocentric. *HSBC* is the classic example of a brand attempting to be ethnocentric but to a consumer who is defined as a global citizen.

Overall in this section, the comments on brand surrogacy, cultural hybridization and ethnocentricity are the most interesting sections of the three themes.

Appendix 4: Samples of generative source material

The following are samples from of a series of observed examples, which were recorded and shaped into cases by the researcher - in order to test perspectives and assist with thematic groupings, in Chapter 2 (Background Theory) and Chapter 3 (Data Theory). This process was held to be an integral component of a generative grounded theory building process.

Case One: Historical factors affecting branding and marketing literature

Analogous perhaps to popular music since the 1960's, branding approaches share certain similarities. As time goes on, a school of thought or approach, which captures convention and practice at that time comes into existence from a body of experts. This conceptual argument forms the backbone behind how categories within the taxonomy have been formed here. So for example in popular music: grunge, punk, electro, glam rock, new romantic and others, are strongly linked with an era steeped in cultural norms and practices. They are also a reaction to the environment of the here and now and what is known about the past and its causal effects. However, rather than one approach replacing another, each prevails in its own right and at times is brought back - becoming *in vogue*. Brown (2001) observes how *retromarketing* can offer an inherent brand value, revolving around concepts of uniqueness rooted in nostalgia, which encourage acceptance. A further examination of this concept and its applicability when generating theory has been considered here. Rather, it is argued that authenticity and the faithful preservation of strategic excellence predicate their execution and retro practices may be a by-product of this. Therefore, brand literature is judged to balance uniqueness and nostalgia, with innovation and futurespection. These observations are evident when looking at the years in which work is published and the conceptual arguments presented of relevance to the here and now - rather than being just historical accounts and reflections.

A review of the literature also points to those categories of published work, largely, or at worst by inference, championing that particular school of thought. Therefore, it appears that academics and practitioners (through their presence in datasets) are looking to revise and refine those schools of thought – and this keeps them alive. A significant portion of literature that sets the agenda, by presenting conceptual frameworks, originates from North America (Emerald, 2010)[1].

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[1] Obtained from publishers, as data available to Editorial Board members. Emerald publishes in 28 subject areas, with over 200 journals, 240 book series and 300 stand alone texts. Their content is available in over 3,000 university libraries worldwide; including 98 of the Financial Times top 100 business schools. Over 21 million Emerald articles were downloaded in 2009, with a projected readership of 15 million. Whilst literature searches and inclusion in this literature review were not exclusive to Emerald publications, this data provides valuable insight into trends and potential gaps in knowledge.
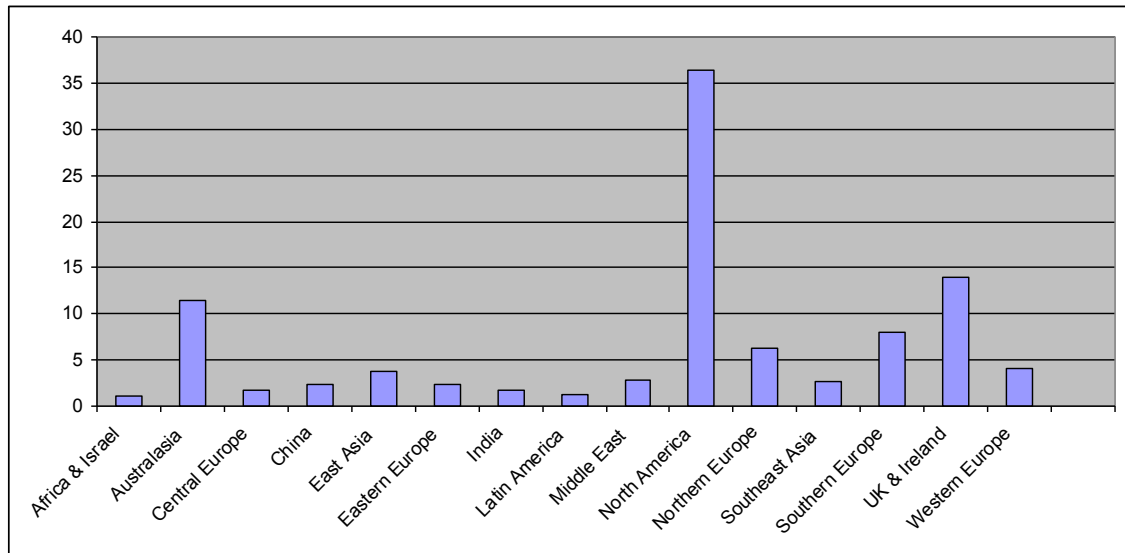
Figure 1 Percentage of Marketing authors by region (Emerald 2010).

Furthermore, examination of the country of origin of authors and their citations, in addition to anecdotal experiences of the researcher attending academic conferences, points to newer schools of thought taking longer to appear in citations and conceptual arguments presented in papers outside of North America and Europe. Furthermore, researchers from regions outside of North America and Europe have raised two issues anecdotally with the researcher. Firstly, access to new and emergent literature is difficult to obtain, due to financial barriers. Secondly, there are strongly held perceptions by these researchers that is more difficult for them to create new schools of thought, which gain acceptance. They have cited a feeling of lack of acceptance from peers on their home soils and peers from those regions that dominate in publishing output. These observations perhaps necessitate a research topic in its own right, which is outside of the domains of this thesis. They also remain contentious in assuming that country of origin of the author plays such a significant factor in potentially biasing analysis. However, what does prevail is the observation that there are marketing academics and practitioners in regions such as Africa, Asia and South America who are more consumers than producers. Drawing from this, a key driver within this study has been to obtain data from a panel of participants who can reflect on varying degrees of global and cultural experiences, by preserving an emic bottom-up perspective of these highlighted regions.

Case Two: Conscious objectors who gather steam

Wilson and Morgan (2011) present reports by Richardson (2002), of a situation where Frank Whitestone, a disgruntled broadband customer of NTL (website: ntlworld.com), created NTHellworld.com. This site gained a search listing directly below that of NTL's and became a platform for fellow customers and employees to share their less than positive views. NTL were able to purchase the site from Frank and offered him a job, which he duly accepted. Following this, NTL rebuilt the site reframing the vitriolic content as being more humorous and tongue-in-cheek; making it an additional arm to their less than popular customer support. Eventually NTL migrated the site to a new domain that they purchased, which was NThelpworld.com.

In this example it is apparent that the interplay between stakeholders is indicative of attributes which shift and also the rising significance of the non-Owner. Furthermore, Frank demonstrates a stakeholder journey, which is reflective of him having moved states from non-Owner to Owner.

Rigopoulou et al (2007) examine the effects of crisis management on brand equity. Following the mention of negative communication, which may translate in some way towards creating negative stakeholders; it is felt that the field of PR and more specifically crisis management are of significance and possess different attributes. For these reasons media stakeholders should be split to differentiate gatekeepers from paid for advertising, as outlined by Wilson (2011b). Within gatekeepers also exist those parties that are not media owners, but have access to these channels - for example: *YouTube* and weblogs. Holt (2002) asserts that whilst there are tensions between iconic brands and the anti-brand movements, which appear at first glance to suggest contradictory and opposing standpoints; they may in fact upon further analysis be logically connected. This further qualifies their inclusion in stakeholder analysis and that their presence can be quantified according to positive, neutral, or negative communication.

Case Three: Freedom of information exchange and online piracy

Most recently at the time of writing, BBC News (2012) reports on how online brands have either taken content offline, or displayed block-out messages over their brands - in protest to proposed laws by US Congress: Stop Online Piracy Act (Sopa) and Protect Intellectual Property Act (Pipa). Also, 'hacktivists' have mounted attacks against websites belonging to US authorities, music companies and other advocates of a crackdown on piracy. These led to the US Congress halting debates for the time being. BBC News (2012) then reported their findings having *"asked a range of stakeholders to analyse the events"* of censorship, which they judge will affect the free exchange of information.

Within the news piece, Professor William Dutton, professor of Internet Studies at Oxford University, offered quotes which appear to support the emotions, thoughts, motives and behaviour of brand stakeholders, as presented in the model[1].

A point of interest is that key terms and descriptors that Dutton used, also share a strong correlation with those of the researcher.

Furthermore, with Dutton's observations of the significance of the Internet in modern society, and that of the number of internet consumers from nations outside of North America: the researcher reflects on his observations in the previous chapter – which consider how increased diffusions and wider stakeholder engagements will change marketing theoretical frameworks, largely originating from North America.

Peer-to-peer file shares and downloads have caused the music industry to continually revaluate their position and ability to gain revenue. Reed (2008) reports how major label music recording artists *REM*, *Radiohead* and *The*

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[1] *"The worldwide diffusion of the internet is one of the most promising technological developments of the 21st Century. Over two billion people already use the internet and that number is set to grow as more people in the rapidly developing nations come online. There are already more Chinese users than there are Americans on the planet.*

It is a core infrastructure for economic development in developed and rapidly developing nations alike, and is enabling networked individuals to hold governments and other institutions accountable in ways that are as powerful as the press in earlier eras.

However, the vitality of the internet, web and related technologies is being placed at risk by an ideologically blinkered stand-off between two single-issue groups - one seeking to protect copyright versus another protecting freedom of expression.

The internet and web grew out of a culture of sharing and free expression within academic communities, and more than 40 years on from the invention of the internet, many users remain supportive of online freedom of expression. Given the high levels of support for this underlying culture it should not be surprising that threats to freedom of expression have created major counter-reactions. Legislative routes to protecting copyright would have a chilling effect on the internet, as they would usher in greater surveillance and governmental sanctioning of the blocking of content as well as the disconnection of users. That is why Wikipedia, Google and other responsible stakeholders in the internet have protested Sopa and Pipa." (BBC News, 2012).

Charlatans have elected to give away their new album releases for free. This would appear to be an extreme course of action, which places the idea of reciprocity at the forefront - and sacrifices the pursuit of economic gains. Through this, stronger kinship and emotional ties are forged - culminating in products and services being championed by more the intangible aspects of brands, and the inclusion of more stakeholders due to their importance. The success of this approach centres on creating a strong brand, with a transferable brand equity, which can be deployed to all business functions and product/service offerings. This paradigm shift has seen the creation of new consumer-centric channels.

Case Four: Evaluative and Communicative Brand factors

Brand survey results from such organisations as *Brand Finance, Brand Keys, Interbrand* and *Millward Brown Optimor's BrandZ, Superbrands,* largely rely on notoriety and financial data, when seeking to rank and evaluate brands. A question that arises is whether financial calculations may in fact push branding towards being viewed as a commodity driven marketing exercise? And further to this, how do these analyses specifically assist a brand architect in their design and creation process? Brands have artistic and figurative elements, which are subsequently commercialised. Therefore, before evaluating their contribution towards the bottom line, an analysis of how these successful brands were created and what is it that makes them so popular, remains essential.

Within bottom-line rooted constructs, there will be an inability to pick up fully on relationship dimensions. Furthermore, the desire to engage in relationships need not be dependent on factors such as hard financial data, or notoriety. In addition, such research, which both ranks and evaluates brands occurs in situ; and resides in the collation of discrete variables. This has a tendency to present a polarisation, and at times dichotomous position - whereby the views of organisations and consumers are examined by different scales. Where there is seen to be a correlation, this is often perceived to represent what constitutes a strong brand. Within this approach lies the potential for gaps in wider understanding, through focusing on exemplars and pariahs, as opposed to brands in general.

An over-reliance such approaches risk restricting the long-term value of a brand, or providing a calculation of diminishing worth. Therefore there are likely to remain future occurrences, where brands triumph, whilst existing outside of standardised and uniform brand assessment tools - due to over-mechanisation and rationalisation, in preference to the 'spirit' of being. These sentiments appear to be in-keeping with there being six other brand perspectives to those examining economic factors, as identified by Heding, Knudtzen and Bjerre (2009).

This dichotomy of thinking within the literature yields on one side a craving to faithfully calculate and rank brands - but in an age where marketing is increasingly being viewed through a lens of postmodernism (or as some academics have suggested *post post-modernism*), it is questionable as to how valuable this information is. When trying to understand brands and consumers in depth, postmodernism and anthropological standpoints assert that categorisation need not necessarily be linked to ranking. Furthermore, if the position is maintained that brands have personalities and identities, which are comparable to human beings, a polemical case is made that it would be considered somewhat superficial and shallow to judge the worth of an individual - simply by notoriety and revenue generation. It is for these reasons that the researcher suggests that there have been revisions of the assessment criteria by which brands are evaluated, and that brand theory now has a much greater level of artistic, philosophical and spiritual essence.

Another challenge faced when examining this phenomenon, lies in the lacunae that exist within brand language and storytelling. In remedy to this, the researcher drew from other disciplines, which appeared to share commonalities. The field of linguistic pragmatism offered some interesting parallels with brand

thinking. As branding is rooted in language, communication, symbolism and meaning: the suggestion is that it lends itself to such an approach.

When looking now specifically at linguistics, Carassa and Colombetti (2009) investigate the linguistic challenges faced when analysing communication. They propose a deontic concept that they term, 'joint meaning'. The paradigm is one that states communications are a process reliant on the sender and the receiver. Following this, they assert that communication cannot be evaluated simply by epistemic and volitional states. The reasons suggested are that epistemic approaches investigate the knowledge of 'that' rather than 'how' - whilst volitional states fail to address disparities between what is intended and explicitly stated. These are opposed to more implicit and interpretive occurrences. Furthermore, languages such as English, in comparison to Hindi or Arabic for example, are limited by their ability to convey such sentiments within the language itself, due to linguistic constraints. As a result, the propensity for gaps in understanding and analysis, not to mention differences in interpretation pose inherent challenges in themselves, especially in international and global markets. Within communication, it is understood that many of these are addressed by the initiator - through the use of metaphor, context and idioms.

Within the fields of branding and marketing, it is apparent that treatment and view of consumers is comparable. They are termed as stakeholders and relationship partners and instrumental in shaping aspects of a brand. However when compared with natural and free exchanges of human communication, what remains elusive in the field of branding, is an understanding of the cause and effect of the consumer on a brand. Consumers may or may not purchase commodities, but if a brand is to be taken as having human characteristics, patronage is only a component of the true resonance that it has with a consumer, compared with marketing. In this, following the analysis of Carassa and Colombetti (2009), the suggestion is that more attention should be placed on analysing the language used by brands and the subsequent touchpoints and cues entered into with consumers.

Carassa and Colombetti (2009) also mention a communication occurrence, which they liken to a 'message in a bottle'. Here they highlight the paucity in a two-way communications process and the intention of the sender by not wanting to engage in such communications. The researcher proposes that this is perhaps a good description of the branding process. In that: two-way communication will inevitably remain asymmetric - due to distance and the fact that whilst a brand may exhibit human characteristics, it can never freely communicate in a comparable way. Following this, the suggestion is that brands possess ethereal qualities, which draw brand theory away from just simple communication, epistemic and volitional states.

As more brands aspire to rise to the higher echelons of global status, the ability to convey a coherent brand message has been observed to encounter further challenges. It has already been asserted that different languages and cultures contain within them their own rules, customs and perspectives. The suggestion is that a critical success factor lies in the figurative speech, use of metaphor and idioms, which support a brand. It is likely therefore that marketers will feel the need to expand their repertoire past universally recognisable symbolism, towards deep-structured encoding patterns, in order to maintain levels of resonance.

Anecdotally, brands such as Google have been well placed to align themselves seamlessly with cultural celebrations, by manipulating their logo as such. This has helped to expand their brand personality and subsequently embed themselves into the value systems of a wide spectrum of consumers globally. A point to note however, in the case of an online company like Amazon, is that if there is an over reliance on financial calculations, there may be a lack of appreciation as to their resonance with non-customers. Amazon offers comprehensive and interactive search facilities, with an array of prices and unedited consumer reviews. Here, consumers may take advantage of these facilities as part of their research, but that they may not result in a purchase through the Amazon site. Instead consumers may choose to visit another site, or even use their hand-held Internet mobile devices as part of their decision making process, when shopping in a physical store. Therefore from these examples, the argument is that brand resonance and worth may not be fully appreciated by only reviewing financial data, especially in an increasingly 'virtual' world.

In addition, with the advent of more integrated marketing communications and a fragmentation of media: promotions and branding have seen an increase in both the use of, and appetite for product placement - ranging from the paid-for, to subtle *YouTube* footage. These points were discussed by academics and industry professionals at The Westminster Media Forum (2008) keynote seminar, entitled *The Future of Broadcast Advertising*. These make it more difficult to evaluate a brand's strength and resonance by quantitative methods, as they use less overt and traditional paid for promotional means. Rather, an approach, which uses qualitative methods, which examine implicit and tacit cues and drivers, may be of more worth. An example lies in the research undertaken by Superbrands (2007), as published under the *CoolBrands* programme; where consumer and expert opinions are gathered in terms of innovation, originality, authenticity, style and desirability. Out of a list of 1,200 forwarded brands, 500 were granted 'Cool Brand' status. Notably many of these brands differed from those in more traditional approaches. This is an indication of differences between the heart and the mind, and how they drive hands into pockets (if at all). Furthermore, it signals the inclusion of iterative processes and collective consensus, drawing from experts, consumers and celebrities.

Human Transactions - concept building

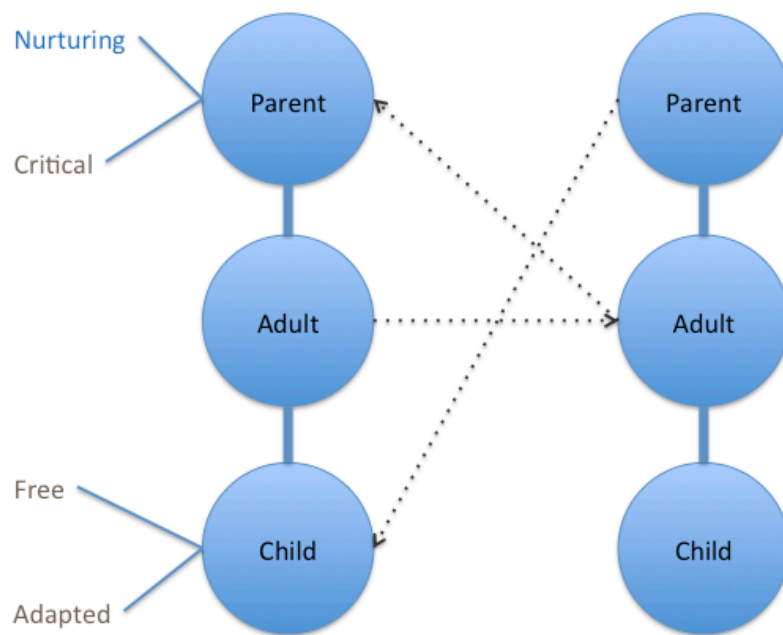## The Human Transactional Exchange

Human Cultural Experience =

[(Internal Me) + (External Me)] ⟷ [(Internal Them) + (External Them)]

[(How I see myself) + (How I am seen)] ⟷ [(How they see themselves) + (How I see them)]

Transactional exchange
Horizontal: free exchange, +ve outcomes
Horizontal: free exchange, -ve outcomes
Asymmetric: +ve (dominant), -ve (harmful)

Transactional Analysis

Eric Berne (1964) *The Games People Play*

Nurturing
Critical
Parent

Adult

Free
Adapted
Child

Parent

Adult

Child

HCE = ((IM) + (EM)) *<transactional exchange>* ((IT) + (ET))

HCE: Human Cultural Experience
IM: Internal Me
EM: External Me
IT: Internal Them
ET: External Them

<u>Transactional exchange</u>
Horizontal: free exchange, +ve outcomes
Horizontal: free exchange, -ve outcomes
Asymmetric: +ve (dominant), -ve (harmful)

Equation applied

Case One examples - simple

IM: Internal Me - Chinese
EM: External Me - Chinese
IT: Internal Them - Chinese
ET: External Them - Chinese

Transactional exchange: Horizontal

Synergy, with +ve outcomes

IM: Internal Me - Chinese
EM: External Me - Chinese
IT: Internal Them - Chinese
ET: External Them - Chinese

Transactional exchange: Horizontal

Disconnect, with -ve outcomes

IM: Internal Me - Chinese
EM: External Me - Chinese
IT: Internal Them - Chinese
ET: External Them - Chinese

Transactional exchange: +ve dominant

Synergy, with acceptance of one dominant view of Chinese culture over another

IM: Internal Me - Chinese
EM: External Me - Chinese
IT: Internal Them - Chinese
ET: External Them - Chinese

Transactional exchange: -ve dominant

Disconnect, with lack of acceptance of one dominant view of Chinese culture over another.

Case Two examples - intermediate

IM: Internal Me - Chinese, English
EM: External Me - Chinese
IT: Internal Them – English
ET: External Them – English

IM: Internal Me - Chinese, English
EM: External Me - Chinese
IT: Internal Them – English, Londoner
ET: External Them - English

Again, there could be several types of transactional exchange, which have +ve or –ve outcomes.

Case Three examples – advanced

It is argued that in the modern world, the following is more reflective of real human experiences, which are:

Dynamic; contextual; and time-specific (both transient and transcendent) – which if not understood, may frame humans as irrational, capricious. A pull to capture and analyse data in real time – as it is tacit knowledge is perishable.

Based upon values, attitudes and behaviour, here are some examples of factors, which constitute collective human internal and external traits (non-exhaustive):

- Age
- Gender
- Income
- Cultural ethnicity
- Friendship bonds
- Family bonds
- Work bonds
- Size of networks
- Religion, faith and spirituality
- Places of travel
- Places of residence
- Acquired tastes
- Interests

- Level and area of education
- Languages
- Brands consumed
- Internet and technological literacy
- Rejected factors

Each individual factor is not mutually exclusive – and so do not represent a zero-sum game. Instead it is argued that they are cumulative, leading to wealth creation and further complicated hyphenated hybrid identities.

So for example, it is possible that someone can be Chinese and English – but more importantly, that they can be 100% Chinese and/or English; depending on the time and context. This perspective supports the idea that individuals can be Global, whilst being locally(cultural)-centric. It also refutes the *Tebbit Test* argument that individuals make clear choices about being Chinese, or English, for example. Furthermore, it challenges concepts of pluralism, multiculturalism and 'melting pots'. Instead, there is one cultural paradigm, with different levels, perspectives and interpretations – all of which are trying to deliver a shared human experience of existence. To this end, cultural separation and differences, are merely means of problem solving, rather than an actual human reality.

To conclude, this means that the challenge is in identifying what are the most dominant and influential factors. In doing so, it also presents various traits side by side. So for example, for some people, religion may fulfil the function of being an ethnic identity, whilst for others it may be a moral compass, or even just an interest. Nevertheless, religion collectively presents itself as a common and reoccurring factor – which renders itself as something which defines and underpins humans, and their subsequent transactions and exchanges.

The implications are that, especially for future generations, without a refinement of traditional approaches and classifications, it will become increasingly difficult to track, place and understand individuals and collectives. Anecdotally for example:

- *Black Music* is seen of as being a term, rather than a means of identifying the race of the musician or audience
- Playing football for England or supporting the team does not necessitate being white, Anglo-Saxon and Christian
- Non-Japanese may crave more authentic Japanese food than the Japanese
- You don't have to be employed by *Apple* in order to offer technical support
- Women can dress modestly, using layers of clothes, which individually are perhaps immodest or marketed in such a way which conflicts with more modest dress codes
- Conventionally 'bad students' could become 'great students', through using unconventional means of attaining scholarship – for example studying in cafes, or at home during unsociable hours, virtually.