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Theories and studies on branding are emerging in many contexts. The two major contributions of this study are to progress the notion of «retailer as a brand» and assess the possibility that different market segments may perceive a different brand meaning from the same retailer (brand).

The research develops the «retailer as a brand» through a quantitative assessment of the link between two of the key dimensions of brand knowledge of *Keller (1993)*, namely brand attitudes and brand attributes. Brand attitudes are a higher (more abstract) level of a consumer's brand knowledge, representing a summary judgment or overall evaluation of a brand. Brand attributes operate at a more concrete, operational level in terms of the retailer– consumer interaction. The study selects one specific retailer (Wal-Mart), representing a specific retail category (discount department store) in a specific country (Canada). Wal-Mart is a suitable choice to start a new research program because of its high awareness among potential respondents, and its status as the world's largest retailer.

Brand morphing refers to the notion that different consumers may associate different meaning to the same corporate brand. That is, multiple brand meanings can co-exist. *Kates and Goh (2003)* are the leading proponents of brand morphing, using qualitative cases. *Berthon et al. (2009)* provide a theoretical frame for brand morphing, emphasizing the theory of mutual knowledge. *De Chernatony et al. (2009)* recognize the paucity of studies of brand morphing. While conceptual studies of brand morphing are rare, quantitative tests of brand morphing seem to be non-existent. The current study fills this void.

Three literatures are critical for the current study. Firstly, the retailer as a brand literature forms the basis of the conceptual model. Such a literature connects to the corporate branding and brand association theories that support the model. Secondly, segmentation literature facilitates the testing for brand morphing. Thirdly, the brand morphing literature is relevant. One of the research objectives is to be the first study to demonstrate quantitatively, brand morphing. *Davies (1992)*, in his pioneering work, enunciates two meanings of retailer as a brand, which include the use of private (retailer-labeled) product brands and a more holistic or organizational conception of the retailer brand. Subsequently, researchers actively apply the brand concept to retailing (*Ailawadi & Keller, 2004; Birtwistle & Freathy, 1998; Burt & Sparks, 2002; Davies & Chun, 2002; Merrilees & Fry, 2002*). Most of the subsequent research, including most of the 2004 special issue in the *Journal of Retailing (Grewal et al., 2004)*, focuses more on the retailer (product) labels component. Less research applies to the retailer as a brand in the corporate branding sense. *Burt and Sparks (2002)* illustrate the concept with four UK supermarkets. *Davies and Chun (2002)* show that there may be a gap in the retailer brand image between the external (consumer) and internal (employee) perspective.

A small number of studies assess which retailer brand attributes form the strongest brand associations. *Selnes (1993)* links a single attribute, product performance quality, to brand reputation.

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Merrilees and Fry (2002) find two brand attributes (interactivity and navigability) influence brand attitudes in an e-retail context of corporate branding. Few if any corporate retailer empirical studies seem to include more than two brand attributes as a determinant of brand attitudes. An apparent exception, *Martenson (2007)*, includes four attributes linked to the store as a brand, but these are reflective rather than formative relationships.

Researchers show the possibility of different market segments having different needs. Indeed, such a possibility forms the rationale for segmentation studies. *Wedel* is associated with sophisticated segmentation research, for example, *Wedel and Desarbo (2002)* profile market segments using finite mixture models. Their commercial application to a financial service provider reveals two segments. In segment one, three service-attributes, namely convenience, design and counter service, influence profit, while only two of these attributes apply to segment two. *Lewis (2004)* models the influence of a reward program and other marketing instruments on customer retention. Using a sample of Internet grocery users, Lewis derives two segments with different behavioral characteristics. Segment one customers purchase less frequently, favor larger orders and are more likely to earn loyalty rewards. Identification of market segments through latent-class models is common (*Bodapati & Gupta, 2004*). Other studies segment customers in terms of how deal-prone they are (*Garretson & Burton, 2003*). The review of segmentation studies is necessarily selective. The review here shows that different segments respond to different attributes, assisting model development in the current study. The review also shows that different segments may have different spending patterns. Such a characteristic supports the identification of the two Wal-Mart segments and one of the aspects of the Table 3 propositions developed later. However, segmentation studies fall short of considering whether different needs might translate into different brand meanings for the same firm.

Conceptually, brand polysemy embraces the idea that brands may create several different meanings to segments (*Brown, 2006; Gottdiener, 1995*). Brand morphing is another way of looking at the same phenomenon (*Kates & Goh, 2003*). *Kates and Goh (2003)* explore the brand morphing concept in depth. Their paper discusses the perceptions of certain segments (e.g., gays) holding different meanings to other segments, though the interviews in their study emphasize how different brand meaning may apply to foreign markets versus domestic markets. Brand morphing within a domestic market was a minor part of their discussion. Moreover, the emphasis was on how the advertising agencies (top-down) can recognize brand morphing to help shape brands for their clients.

Recent developments focus on how consumers can co-create the brand (*Beverland & Ewing, 2005; Boyle, 2007; Brown et al., 2003*). The co-creation literature combines a top-down and a bottom-up way of building brands. The potential exists to create more than one interpretation of the same brand, that is, brand morphing.

Brand community is a special case of consumer sub-groups. Brandcommunities represent the potential for consumers to capture brands and instill their own meaning (*Muniz & O'Guinn, 2001*). Multiple sub-groups may imbue different brand meaning to the same corporate brand, leading to brand morphing. Relationships seem very important for brand communities (*Veloutsou & Moutinho, 2009*). Harley-Davidson sub-cultures are a favorite research context (*Schouten & McAlexander, 1995; Schembri, 2009*). Despite the potential, previous studies of brand communities do not quantitatively test for brand morphing.

The literature on brand relationships is relevant because the implication is that different consumers might relate differently to the same brand (*Fournier, 1998; Muniz & O'Guinn, 2001*). However, this literature does not empirically demonstrate that different subcultures attach different brand meaning to the same corporate brand. *Berthon et al. (2009)* provide a theoretical foundation

for brand morphing. The theory of mutual knowledge underpins their conceptual model. Mutual knowledge through marketing communications and experience can form common meaning. Conversely, different marketing communications and experiences can create multiple brand meanings. Various propositions in their paper seem orientated towards the (apparent ideal) creation of common meaning. For example, one of their propositions, strongly influenced by *Kates and Goh (2003)*, indicates that different groups may hold divergent knowledge about the brand. If this is the case, different communications will be necessary to produce consistent brand meaning across groups.

In the internal context of organizations, de *Chernatony (2009)* proposes an evolutionary spectrum that suggests why the meaning of brand might vary among managers in the same organization. Potentially, managers who are more sophisticated have more emotionally oriented brand values. The current study combines the empirical emphasis of segmentation studies, which quantitatively profile different customer segments, with the conceptual emphasis of the brand morphing and brand relationship literatures. That is, one research objective is to test quantitatively whether customer segments of a given retailer (Wal-Mart) form different brand meanings. Later sections discuss both the theoretical and the managerial implications of the results, and the contributions of the study.

Research design

The current study uses the *Keller (1993)* brand knowledge paper as a starting position to research retailers as corporate brands. Two major dimensions of brand knowledge in the *Keller (1993)* schema are brand attitudes and brand attributes. Brand attitudes are a higher (more abstract) level of a consumer's brand knowledge, representing a summary judgment or overall evaluation of a brand. Brand attributes operate at a more concrete, operational level in terms of the retailer–consumer interaction. Several studies in the literature (*Merrilees & Fry, 2002; Selnes, 1993*) have linked the two dimensions of brand knowledge, usually with just one or two brand attributes. The current study goes further by specifying a greater number (four) of brand attributes in the brand association model.

Formally, the study specifies the retailer brand association as follows, $BA = f(M, SD, S, LP)$ where BA denotes brand attitudes of customers towards the retailer, M denotes customer perceptions of merchandise quality, SD denotes customer perceptions of store design, S denotes customer perceptions of staff service and LP denotes customer perceptions of low prices.

Including four brand attribute variables in the model enables a more elaborate understanding of brand knowledge relevant for a particular retailer. The relative importance of each brand attribute is inferable, and critical to managing real and powerful retailer brands such as Wal-Mart.

The BA model is tested for Wal-Mart as a whole and also for the two separate segments (customers with a first-preference or second-preference attachment to Wal-Mart). Segments with different levels of attachment or loyalty to a retailer may form different brand meanings. Consistent with *Berthon et al. (2009)*, more loyal customers may have greater familiarity and experience of the same retailer brand and on that basis form a more intense meaning than that of a less-loyal segment. For example, *Low and Lamb (2000)*, based on an inter-brand rather than an inter-segment contrast, suggest more familiar brands have more elaborate and complex brand associations. The current study tests this theoretical expectation empirically in terms of two Wal-Mart segments. The dependent variable is a multi-item, summative measure of brand attitudes towards the retailer. Table 1 specifies the three items that measure brand attitude. The three items are in terms of Wal-Mart as a corporate retailer. Summative means that the scale refers to the respondent's overall evaluation or assessment of a corporate brand.

For example, one of the items asks respondents the extent (on a tenpoint scale) to which they agree that they admire what Wal-Mart does. Overall refers to the total or holistic brand. For modeling purposes, the variable brand attitude is the average score of the three items. Note that the brand attitude items relate to the overall Wal-Mart corporate brand, not to a particular store.

Each brand attribute (of the four attributes in the model) forms a brand association with the retailer. The model is able to assess the relative contribution of each brand association, through standardized beta coefficients. The four brand attributes represent the main retail mix attributes in retail research (*Rinne & Swinyard, 1995*). The brand attitude items are taken from *Selnes (1993)*, *Sandvik and Duhan (1996)* and *Delgado-Ballester and Munuera-Aleman (2001)*. Ten-point scale intervals suit a telephone interview, anchored at one (for very low) and ten (for very high). Table 1 shows the scale items.

The study uses quantitative analysis, namely multiple regression analysis. The context of the study is the market leader (Wal-Mart) in the Canadian discount department store category. Data collection focuses on a region joining two major cities, Hamilton (population about 500,000) and Burlington (population about 150,000) in Ontario, Canada. Although other areas within Canada are relevant, the particular chosen locality is a major population center in the largest province in Canada. Other more remote areas are less typical.

Table 1

Scale items used in the survey instrument.

<p><i>Merchandise quality</i> (three item scale using 10-point rating scales)</p> <ol style="list-style-type: none"> 1. Merchandise is of high quality 2. Store has clothing of latest trends/styles 3. Private label brands are very good
<p><i>Store design</i> (six item scale using 10-point rating scales)</p> <ol style="list-style-type: none"> 1. The store is laid out so that merchandise is easy to find 2. Displays look good visually 3. Neat and clean 4. Modern look 5. Self-selection is easy and well guided 6. Product displays have helpful information
<p><i>Staff service</i> (five item scale using 10-point rating scales)</p> <ol style="list-style-type: none"> 1. Sales staff are knowledgeable 2. Sales assistants are quick to help 3. Store has fast checkout 4. Friendly staff 5. Customer service staff are quick and efficient
<p><i>Low prices</i> (three item scale using 10-point rating scales)</p> <ol style="list-style-type: none"> 1. Store has everyday low prices 2. Sales and specials are real bargains 3. Store offers value for money
<p><i>Retailer brand attitudes</i> (three item scale using 10-point rating scales)</p> <ol style="list-style-type: none"> 1. There is something special about this store 2. Really value the unique identity of the store 3. Greatly admire what the store does

Random surveys are the most robust. However, few viable ways of conducting random surveys are available. Mall intercepts are popular, but are not random surveys because not all members of the population frame have an equal chance of selection. In the current study, the main choice was between a mail survey and a telephone survey. Access to an up-to-date population (household) address database was not available, so a random mail-based survey was not possible. Thus telephone surveys were the only viable method of conducting a random survey. Additionally, a telephone survey was chosen because of the ease and speed of conducting random surveys. Generating a sample frame through a random generation of digital numbers was easily done. Essentially all households with a telephone are in the sample frame because 90% of the population shop at a discount department store. However, more precisely, the sample frame is all shoppers at a discount department store. In Canada, only two major retail chains in the discount department store category (Wal-Mart and Zellers) exist. The interviewers established that the respondents were discount department store shoppers by asking whether they shop at either Wal-Mart or Zellers. Trained interviewers conducted the random (telephone) survey of discount department store shoppers. The interviewers changed the order of asking questions to prevent item order bias.

The first research objective was to measure the relative power of different brand associations influencing customers' overall brand attitudes to Wal-Mart. Multiple regression analysis was conducted, with overall brand attitudes towards Wal-Mart as the dependent variable and four key corporate brand attributes as the independent variables. The independent variables were the main retail mix variables established in the retailing literature: merchandise quality, pricing, store design (layout and visual merchandising) and service. The standardized beta coefficients from the regression indicate the relative brand impact weighting of a particular retail mix element.

A second research objective is to compare the brand associations of two segments of customers, one very attached to Wal-Mart and the other less attached. Preliminary questions guided the allocation of respondents into one of the two segments. An early question in the survey asks whether the respondent did shop at either Wal-Mart or Zellers in the previous six months. If the answer is neither then the interview ceases because the person is not part of the sampling frame. The next question asks whether the respondent prefers Wal-Mart or its main competitor, Zellers. If the respondent prefers Wal-Mart or only shops at Wal-Mart for this retail category, this person is allocated to the first-preference segment. All remaining questions in the survey are about their perceptions of Wal-Mart. Alternatively, respondents were assigned to the second-preference segment if they shop at both Wal-Mart and Zellers, but prefer Zellers. For this segment as well, all of the remaining questions were about their perceptions of Wal-Mart, so that brand associations can be compared across the two segments. As a further probe to the veracity of the preference identification, another question asks in which of the two stores the greater monthly expenditure was, with a close fit with the preference answer. Exaggeration of allegiance to brands may occur in some studies. However, the potential problem seems to be less of an issue in the current context where effectively only two brands are in the retail category and where one firm (Wal-Mart) has a dominant share (70%). To reiterate, the two-segment split of respondents is a deliberate part of the research design. Checks and balances, combined with subsequent analysis, give confidence that the study identifies the segment more closely attached to Wal-Mart and the segment less attached.

Samples and data reliability

The sample was 250 Wal-Mart customers, including 160 first-preference customers and 90 second-preference customers. The unbalanced sub-samples reflect the high market share of Wal-Mart. With 70% of the market, the number of respondents nominating Wal-Mart as a first preference dominates those nominating Wal-Mart as a second preference. Women comprised 73% of the sample, consistent with known information about the typical discount department store consumer (*Williams Group, 2000*). The age distribution is broad, spread around a modal sub-group aged 30–54, again consistent with the known profile of the typical shopper in this retail category. The city split between Hamilton and Burlington is 70/30, reflecting Canadian census populations and imposed by random sample objectives.

The Cronbach alpha tests each scale for reliability. All of the scales exceed the 0.70 benchmark for satisfactory reliability. The Cronbach alpha scores are brand attitudes 0.91, merchandise quality 0.81, service 0.85, low prices 0.88 and store design 0.88. Confidence in the data stems from the random generation of the sample, credible demographics and reliable scales.

All of the multiple regressions have high explanatory power, with adjusted R² greater than 0.50 (see Table 2). None of the regressions has a multicollinearity problem, with all VIF values less than 5. Additional tests using confirmatory factor analysis demonstrate the discriminant validity of the constructs (*Fornell & Larcker, 1981*).

The standardized beta coefficients reflect the strength of particular brand associations. For the total (aggregate) sample, three brand attributes are statistically significant in determining brand

attitudes to Wal-Mart. Service has the strongest brand association ($\beta = 0.30$), closely followed by store design ($\beta = 0.28$) and merchandise quality ($\beta = 0.16$).

Separate regressions of the two customer segments, the first-preference Wal-Mart segments and the second-preference segment, reveal diverse results. The first-preference Wal-Mart segment replaces merchandise quality with low prices. In contrast, only two brand attributes, merchandise quality and service, are relevant for the second-preference Wal-Mart segment.

Statistical tests, using the Chi-square test (the Chow test; *Studenmund, 2001*) confirm that separate regressions are appropriate for the Wal-Mart preferred and the less-preferred segments. That is, the two segments do differ in the weightings of their brand associations. Different weights attach to the relevant brand associations, demonstrating that in practice brands morph for different subcultures.

Discussion of theoretical implications

The study provides insight into which retailer brand attributes are instrumental in influencing customer brand attitudes about the retailer. Thus, the results progress the understanding of the influences that shape retailer brands, in the corporate brand sense. The brand model, linking brand attributes to overall brand attitudes, is consistent with the data. Conceptually, the model evaluates and ranks the differential strength of specific brand attributes. The model is potentially applicable to other retailers in other retailer categories.

The results support brand morphing, the subject of previous conceptual literature (*Brown, 2006; Kates & Goh, 2003*) and thereby strengthen that literature.

For the first-preference segment, the Wal-Mart brand assumes richer texture, with a greater number of retailer attributes (that is, three) shaping the retailer brand. For the second-preference market segment, only two brand attributes, staff service and merchandise, influence brand attitudes.

Table 2
Components of brand association: Wal-Mart study.

Variable	Total sample ($n = 250$)	First-preference segment ($n = 160$)	Second-preference segment ($n = 90$)
Constant	-1.84 (3.06)	-2.89 (3.59)**	-0.98 (1.06)
Staff service	0.30 (4.69)**	0.23 (2.70)**	0.31 (2.87)**
Low prices	0.10 (1.62)	0.19 (2.48)*	-0.00 (0.01)
Store design	0.28 (3.82)**	0.37 (4.00)**	0.21 (1.77)
Merchandise	0.16 (2.65)**	0.06 (0.84)	0.32 (3.03)**
Adjusted R^2	0.52 (67.8)**	0.54 (47.3)**	0.51 (23.8)**

Dependent variable: customer perceptions of brand attitude towards Wal-Mart (absolute t or F values are in parentheses).

Note: ** denotes significant at the 0.01 level; * denotes significant at the 0.05 level.

The needs of the second-preference segment appear more limited; these less attached customers simply want to obtain the merchandise and receive appropriate service. Although speculation is premature, the results are consistent with different shopping motives delineating the two segments. Extensive decision-making with a comprehensive brand criteria set seems relevant for deciding a primary retailer destination choice in a particular retail category. *Low and Lamb (2000)* support the notion that brands that are more familiar tend to exhibit more developed brand association structures than unfamiliar brands. Their study compares brands rather than segments across a given brand, but a similar concept applies in the current findings.

Contrasting the two Wal-Mart segments reveals salient differences, as follows: more loyal or attached versus less attached; high annual dollar spend versus low spend; more frequent purchases versus less frequent; and of special significance, rich multidimensional brand texture versus a basic or minimalist brand texture (focusing on the core product, namely merchandise). Table 3 frames the contrasts between the two segments in terms of two propositions to generalize the study's interpretation. The last aspect of Table 3 interpolates from the other characteristics. That is, in a retailing context, the more attached segment likely exhibits regular and habitual spending patterns, while the less attached segment likely exhibits irregular, top-up or emergency spending patterns. The propositions represent a way of coding the Wal-Mart cross-segment results, facilitating future researchers' replication and extension of the current study.

The contrast of the two brand segments compares with a simple alternative view, namely that the second-preference segment simply does not care where they shop, the classic apathetic shopper identified in many shopper typologies. Arguably, the weaker brand texture of the second-preference segment is attributable to apathy. In contrast, this paper argues against such an alternative view for several reasons. Firstly, the assumption that all apathetic shoppers go to one chain only (Zellers) is not plausible. Apathetic shoppers are likely spread across stores, so a certain proportion of first-preference Wal-Mart segment will be apathetic shoppers. In all likelihood, apathetic shoppers are proportionately present in both stores. Secondly, apathetic shoppers in other studies tend to give low ratings on many store attributes. In the current study, the second-preference Wal-Mart segment does not give low ratings to Wal-Mart. Indeed, they give quite high ratings on most attributes, albeit and understandably about 10% lower than the ratings by the first-preference segment. Thirdly, the second-preference Wal-Mart segment will likely have stronger preferences (with richer brand texture) when it comes to their first-preference discount retailer (Zellers), not covered here. Thus, the main differences between first-preference and second-preference Wal-Mart segments have little to do with the general shopping trait of apathy.

Questions for your consideration

1. What is the main research question of the article?
2. What are the drawbacks of the research design (data, methods, analysis)?
3. What managerial implications of the findings do you suggest?
4. What new research methods can you suggest that were not available for the original research project? Is this research still relevant?
5. What additional tools of loyalty measurement can you suggest for retail business?

