From the retail brand to the retail-*er* as a brand: themes and issues in retail branding research

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Abstract

Purpose – The purpose of the paper is to present a review of the existing research themes in the area of retail branding, and note how these have developed as the conceptualisation of "branding" in retailing has itself evolved.

Design/methodology/approach – This paper reviews existing research themes within retail branding. There is a vast body of academic literature on branding, or aspects of branding in retailing. The initial focus of academic work was upon the product perspective via studies of the store brand. This body of work is summarised under five broad themes – the characteristics of store brand prone consumers and the product attributes which attract consumers; the growth of and motivations for retail brand development; the role of changing channel relationships and behaviours on store brand development; intra-category brand relationships; and the concept of copycat brands. From this initial, rather narrow, perspective research has evolved, taking on a wider view the brand in retailing which in turn has encompassed the store and the organisational perspectives.

Findings – The evolution of branding in retailing from studies of store brands to the exploration of the retail-*er* as a brand has been matched with a widening of the conceptualisation of the brand in retail research: from the product as a brand to the store as a brand and most recently to the organisation as a brand. This has implications for future research in terms of the themes under investigation, research design, and the research methodologies employed.

Originality/value – The paper summarises the themes in existing retail branding research, notes the evolution of thought in retail brand research and suggests areas for future research.

Keywords Research work, Retailing, Brands, Corporate branding

Paper type Literature review

Introduction

When we discuss research into retail branding, the natural starting point is the retail product brand – invariably referred to as the "private brand", the "store brand" or the "retail brand". Private brands have generated a vast body of research on both sides of the Atlantic over the past 40 years. In a recent review article, Hyman *et al.* (2010) generated 73 articles published since 1990, simply through a key word search in the Business Source Premier database. Whilst such an approach is likely to underestimate the total volume of material, this figure is nonetheless impressive. The authors also comment on the variety within this body of work in terms of the origin of the article (i.e. the USA or not), the product categories investigated, the research methods used (e.g. sample frames, sample sizes, and types of panel data), and the analytical tools employed.

One obvious criticism of key word searches of electronic database is that they are dependent on the choice of terminology (and journal inclusion). Indeed, in the above study, the authors used the composite term "private label brand", presumably to extend the scope of their search. Without wishing to rehearse the terminology debate covered

in most retail marketing textbooks it is evident from the focus of several early studies that the definition of the "subject" has caused some concern (Schutte, 1969; Morris, 1979; Simmons and Meredith, 1984; Martell, 1986; de Chernatony and McWilliam, 1988). This extended discussion around terminology, which was often based on product features such as quality composition, price position, packaging, and naming, implies that a certain degree of variety and/or evolution is hidden by the umbrella term "retail brand". This is an important issue in retail (product) brand research as the national setting, the timing of the study and even the choice of retail company may mean that cross-study comparisons may not be considering like with like. The "retail brand" in one study and in one context may not be directly comparable with the "retail brand" in another.

Initially, definitions and categorisations of retail brands were framed around descriptive typologies, with some debate over whether generics were a sub-category of private brands or a distinct category of brand in their own right (Bellizzi *et al.*, 1981; McGoldrick, 1984; de Chernatony, 1988). Since the mid-1990s, however, it has been recognised that a more discrete segmentation, incorporating the fit or link to broader assortment and positioning strategies is more appropriate (Laaksonen and Reynolds, 1994; Wileman and Jary, 1997; Burt, 2000; Juhl *et al.*, 2006).

In the remainder of this paper, we will first consider the broad themes found within existing research focused upon the retail (product) brand, before exploring an extension of the research focus to incorporate a more holistic view of branding in retailing, which involves the retailer as a store and as an organisation. We conclude with a few comments on the future direction of research.

Research into retail brands
In the introduction to the *Review of Industrial Organization* special issue on retail brands, Scott-Morton and Zettelmeyer (2004) comments that store brands are of interest to both marketers and industrial organisational economists because they entail issues of competition among retailers, and between retailers and manufacturers. These horizontal and vertical dimensions have underpinned much of the existing work on retail brands, and allow a straightforward stakeholder (consumer, retailer, supplier) framework to be used to consider past research.

It is perhaps not surprising that the initial focus for research was the identification of private brand consumers. Various attempts have been made to determine the characteristics of those prone to purchase these products (Frank and Boyd, 1965; Myers, 1967; Rao, 1969; Burger and Schott, 1972). However, these studies – whether exploring private brand consumers in general or having a specific focus on generic brand consumers (Granzin, 1981; McEnally and Hawes, 1984; Rosen, 1984; Wilkes and Valencia, 1985; Szymanski and Busch, 1987) – have generally failed to determine consistent consumer profiles. This theme has persisted within the literature since private brands first appeared and has been explored in many national contexts (Richardson *et al.*, 1996b; Ailawadi *et al.*, 2001; Baltas, 2003; Bonfrer and Chintagunta, 2004; Zielke and Dobbelstein, 2007; Baltas and Argouslidis, 2007; Martinez and Montaner, 2008), and via a variety of approaches including the use of human personality research (Whelan and Davies, 2006). It is now accepted that that a wide range of customers with different demographic, socio-economic, lifestyle, and value profiles purchase private brand products.

Closely aligned to this theme is a second stream of research which took the retail brand product as the object, and sought to identify the product attributes which were

of greatest interest to consumers (Baltas, 1997; Baltas *et al.*, 1997; Gonzáles Mieres *et al.*, 2006; Grunert *et al.*, 2006; Glynn and Chen, 2009). As the retail brand has evolved over time, the actual and perceived quality gap with national brands declined (Hoch and Banerji, 1993; Quelch and Harding, 1996; Batra and Sinha, 2000), as has the price differential between the two, and other largely marketing-related factors have come into play. Consequently, the focus in the research into product attributes has become more multi-dimensional, moving away from considerations of the price-quality relationship to encompass perceived risk, presentational issues (shelf space, packaging cues and positioning) and product category and retail format considerations.

As the sales of retail brands have grown and as they began to dominate certain product categories and move into others, academic research also sought to explain their growth (Davies *et al.*, 1986; Fitzell, 1992, 2003; Hoch, 1996; Dhar and Hoch, 1997; Dunne and Narasimham, 1999; Burt, 2000; Kumar and Steenkamp, 2007; Lamey *et al.*, 2007), and why retailers sold these products (Mills, 1995; Steenkamp and Dekimpe, 1997; Steiner, 2004). Several motives were identified including the potential of private brands to: generate higher margins (Hoch and Banerji, 1993; Hansen *et al.*, 2006) and improve category profitability (Raju *et al.*, 1995; Narasimhan and Wilcox, 1998; Putsis and Cotterill, 1999; Bontemps *et al.*, 2008); lower the financial risk of new product launch; provide a source of differentiation from competitors either through positioning or availability (Richardson *et al.*, 1994; Davies, 1990; Sudhir and Talukdar, 2004; Scott-Morton and Zettelmeyer, 2004; Liu and Wang, 2008); engender greater store and retailer loyalty (Steenkamp and Dekimpe, 1997; Corstjens and Lal, 2000; Binninger, 2008); improve retailer image; and allow a wide range of product options to be offered to meet the differing needs and values of customer groups (Sayman *et al.*, 2002; Anselmsson and Johansson, 2007).

There has been less of a focus, certainly in terms of the volume of published output, on the role of suppliers in retail brand growth and particularly the implications of retail brands for relationships between retailers and suppliers. Research exploring the channel perspective has focused on changing power relationships in the channel and the specifics of procuring private brands, with a particular emphasis on how retailers have begun to dominate channels and drive store brand development (Shaw *et al.*, 1992; Bhasin *et al.*, 1995; Collins and Burt, 2006; Cotterill and Putsis, 2001; Scott-Morton and Zettelmeyer, 2004; Johansson and Burt, 2004; Tarzijan, 2004; Oubiña *et al.*, 2006). Yet, Soberman and Parker (2006) suggested that when both manufacturer and retailer have market power, then both may benefit from the introduction of a quality-equivalent store brand by the retailer as it can lead to higher average category prices.

This dyadic, stakeholder framed, structure has also been complemented by investigations into aspects of intra-brand competition at the product level. Two themes have been of particular interest. First, the impact of private brands upon the wider category assortment, for example on assortment profitability (Sayman *et al.*, 2002; Sayman and Raju, 2004; Ailawadi and Harlam, 2004) on category price levels (Putsis and Cotterill, 1999; Bonfrer and Chintagunta, 2004; Pauwels and Srinivasan, 2004; Anselmsson *et al.*, 2008); on price and variety levels (Olbrich and Grewe, 2009), and on the allocation of shelf space (Fernandez Nogales and Gomez Suarez, 2005; Suarez, 2005; Amrouche and Zaccour, 2007).

If we accept that the merchandising and display decisions made by retailers are able to negate the equity of an established national brand (Buchanan *et al.*, 1999), then other studies argue that the wide variations observed in the market share of private brands are

deliberate reflections of the retailers' marketing policies. As such, the level and forms of merchandising employed could easily explain the differing views about private labels between the USA and Europe in the past (Richardson, 1997). Thus, a number of authors (Kim and Parker, 1999; Cotterill *et al.*, 2000; Rondán Cataluña *et al.*, 2006) have argued that the development of brand loyalty is the key factor affecting the purchase of both national and private brands. Whilst retailers are able to manipulate prices to try to get consumers to switch between them this is generally seen as occurring on a product-specific basis within a wider view of the benefits of private brands.

A second theme is the issue of copycat brands, based upon the accusation that private brands take up free-rider positions alongside leading manufacturer brands (Uncles, 1995). This issue has been explored in a number of national and product contexts often stimulated by specific high-profile incidents (Miaoulis and D'Amato, 1978; Loken *et al.*, 1987; Foxman *et al.*, 1992; Kapferer, 1995a, b; Rafiq and Collins, 1996; Balabanis and Craven, 1997; Burt and Davis, 1999; Collins-Dodd and Zaichkowsky, 1999). Choi and Coughlan (2006) argued that this was a perfectly natural response to the prevailing market position and that a private brand should only seek to differentiate itself from the existing national brands when the latter were undifferentiated. When national brands are differentiated, they suggested that higher quality private brands should position themselves close to a stronger national brand and low quality private brands closer to a weaker national brand.

Whilst various approaches and methodologies have been employed in constructing this body of work, most academic research over the past four decades, perhaps driven (or at least reinforced) by the methodologies employed, has overwhelmingly taken a managerial perspective on branding, based upon the transmission models of brand communication, where it is assumed that the brand is a wholly managerially (or sender) produced concept. The retail brand is taken as an assumed given. It is only relatively recently that the idea of socially co-constructed brands, more familiar to the consumer culture approach, has begun to gain attention (Kozinets *et al.*, 2002; Esbjerg and Bech-Larsen, 2009; El-Amir and Burt, 2010) although usually this has been in relation to a wider concept of the retail brand than simply a product item.

The retail-*er* as the brand

The emerging view of the retail brand as a wider concept than simply a product brand was discussed in the *Journal of Retailing* special issue of 2004. In the position paper introducing the issue, Ailawadi and Keller (2004) recognise a broader concept of branding in retailing. They acknowledge that retailer brands are more multi-sensory than product brands and discuss the linkages with retail image in particular. The private brand is relegated to an (albeit) important part of the brand portfolio offered by retailers, and they argue that it is the image of the retailer held by customers that is the basis of retail brand equity.

There is an intuitively simple logic to this viewpoint. If consumers increasingly treat segmented private brand ranges as an alternative brand (rather than as an alternative product) to the manufacturer brand on offer, then this suggests that these product ranges are trusted by consumers. One characteristic of branding is that it allows consumers to identify preferences, and reduce consumer search costs. Therefore, the retail brand name and the retail context within which it is sold, presumably enables such identification and recognition, and reflects a level of trust which encourages repeat purchase.

If trust comes from a retail name, from where do customers get their impressions of the retail brand? Steiner (2004) provides an interesting historical context to national and private brand competition, and quotes from the work of Braithwaite, published in the late 1920s. She observed that advertising and reputation contributed more than quality to the price differential between leading advertised national brands and unadvertised national brands and private labels. Although private labels were cheaper they "do not however dispense with reputation altogether as a factor in marketing, For the reputation of these large shops themselves, is one of the means by which they are able to secure volume and rapidity of turnover" (Braithwaite, 1928 in Steiner, 2004). In short, trust (or reputation) emerges from consumer interactions with stores and the retail company itself.

When we talk about brands in retailing as customers, we generally refer to a specific (named) company or a store – we rarely say "I am going to the superstore", "to the convenience store" or "to the clothes shop". As consumers, we have often decided which retailers or groups of retailers to visit before we start a shopping trip, on the basis of pre-existing conceptions and past experiences of those stores, and interactions with the retailer through the store. It has long been recognised that retailers create an image or reputation in the minds of the consumers and it would be remiss in an article of this nature not to mention Martineau (1958) and the idea of the personality of the store (!). The store is a crucial – and unique – element in retail*er* branding. It is the place where the customer experiences the retailer and to many the store is the retail product (Kasulis and Lusch, 1981; Porter and Claycomb, 1997; Floor, 2006). The store as the "brand" is probably easier to relate to in several non-food sectors where the product on offer is 100 percent store brand (e.g. IKEA, Zara, Next, the Gap, etc.).

As the conceptualisation of retail brands has widened from the product to encompass the store, several researchers have examined the relationship between the two, although as Jacoby and Mazursky (1984) note, the linkages between brands and store image are multi-faceted and multi-dimensional. For some, the store image influences the product brand, whilst for others, the product brand influences store image. In the mid-1990s, several of the papers published from the Dick *et al.* (1995) study noted that store image was an important indicator of store brand quality and that perceptions of the physical environment, merchandise and service quality were important cues in evaluating store brands, and that store aesthetics aided the formation of store brand quality perceptions (Richardson *et al.*, 1996a).

More recently, other studies have explored the link between store image and the store brand. In Canada, Collins-Dodd and Lindley (2003) concluded, perhaps not surprisingly, that store image is more complex and dynamic than product associations, and suggested that the store name on a store brand was in effect a form of brand extension, and that positive store attributes could be leveraged to increase awareness of and build positive perceptions of store brands. "A strong relationship between store and store brand image is the fundamental requirement for a successful differentiation strategy". In a similar vein, Semeijn *et al.* (2004) claimed a direct and linear relationship between store image and attitudes towards store brands for three Dutch grocery chains and a selection of products chosen to represent different levels and types of consumer risk. The authors claimed that their research suggested that "developing, nourishing and sustaining a store image can create differentiation and positioning relative to other chains and see profitable store brands". Finally in a different setting, the department store, Vahie and

Paswan (2006) found that store atmosphere and store quality positively influenced consumer perceptions of store brand quality, although it was also noted that congruence between national brands and store image could have a negative influence on store brand quality perceptions. The authors emphasised that the subject of their study, clothes, are a higher involvement and higher price type of purchase compared to routinely purchased groceries, and carry a greater degree of social risk.

The growing attention paid to the retail store as the embodiment (or the source) of the brand in retailing brings us back to further issues around terminology and conceptualisations. Ailawadi and Keller (2004) quite correctly make the case for a greater integration of mainstream branding concepts into retail brand research "Our contention is that branding and brand management principles can and should be applied to retail brands. Even though there has not been much academic research on retail branding per se, a lot of work has been done on retailer actions and consumer perceptions of retailer image that has direct relevance to branding". But as they, themselves suggest, this generally entails taking store image as a proxy for retail*er* brand image.

Greater consideration of "mainstream" branding concepts in retailing requires us to be clear about these concepts and how they are interpreted in retailing. For example, although the terms are often used interchangeably, there is an important distinction between brand image and brand identity. The brand image (aka store image) is the current view or perceptions of the consumer, and others, of the brand. It is comprised of associations and beliefs about the brand and is regarded as a passive construct, reflecting the current situation or past associations. Brand identity originates from the organisation and includes elements such as vision, culture, personality, and relationships. Brand identity should be aspirational and forward looking. Kapferer (1986) pursued this distinction in some of his early work which looked at how retailers might seek to differentiate themselves. He argued that most retail advertising was mechanical – with a focus on functional aspects (price, service, range and availability) that were intended to influence consumer behaviour, i.e. persuade them to buy from one store rather than another. Instead, he argued, the focus should be on "engagement" with customers, by focusing on their perceptions and attitudes, with a focus on the entire store as the retailer's product and the company personality which in turn gives rise to an identity. This focus on attitudes required a move from what is "said" to how to say it.

This developing of the brand concept in retailing brings us into the area of corporate branding. Mårtenson (2007) in yet another attempt to understand the determinants of satisfaction and loyalty in retailing defines corporate image as store image. Although, she concludes that the key factor for customers is the store as a brand, so "retailers must be good at retailing", she also makes another important observation about the holistic nature of branding in retailing. "A coherent look and feel that reflects the values of the corporate brand is assumed to have a positive impact on the store brands carrying the corporate name".

The corporate brand as a concept aligns internal organisational systems and external stakeholder networks with the organisation's core vision, values and culture (Balmer, 2001; Balmer and Gray, 2003; Kunde, 2002; Hatch and Schultz, 2003; Brown *et al.*, 2006). Ind (1997) defines the corporate brand as the "sum of values that represent the organization", and claims that it is distinct from product branding in three ways. First, the corporate brand is intangible, but has elements of tangibility through communications and relationships with stakeholders; second, it is highly complex

because of the variety of relationships involved, and third, there are specific issues of responsibility arising from the role of people in delivery, and through the organisation's sense of ethics and social responsibility. It is generally recognised that the corporate brand is essentially a relational construct based upon customer relationships built, maintained and delivered by employees; networks of suppliers and partners who deliver enhanced consumer value; and relationships with external stakeholders such as the media, investors, public authorities and local communities who all contribute to reputation and perception of the brand (Einwiller and Will, 2002).

In some of the generic work on corporate brands, retailers are often cited as examples of strong corporate brands, so it is not surprising that the role of corporate branding – or at least elements of corporate branding – in retailing is starting to attract attention. The relational nature of corporate branding makes retailing an obvious candidate for consideration. Mitchell (1999) in a discussion on Brand Reality identifies a series of relationships between retailers and consumers which he classifies as communication linkages, experience links and emotional links – images and associations – with consumers, all of which are claimed to deliver extra added value, communicate something about the brand, and enable the retailer to learn from the customer in real time.

Burt and Sparks (2002) note that the basic features of corporate branding are all inherently applicable in retailing – although they caution that the nature of retailing and the scope and intensity of relationships with stakeholders may pose potential challenges of consistency to retail corporate branding. Further challenges may arise from the often raised tension between costs and service as productivity gains are sought in retailing, and the added dimension of retail internationalisation. Despite this, Tarnovskaya *et al.* (2008), explore the role of corporate branding in market driving, specifically in an international retailing context with IKEA in Russia, and argue that a strong corporate brand may both provide competitive advantage and determine approaches and activities in new international markets.

The significance of corporate branding has certainly been recognised by the retail industry itself. Burghausen and Fan (2002) explored how executives at seven UK retailers considered and thought about corporate branding in their own organisations. There was a growing awareness of the corporate brand as an holistic process and the role of the corporate brand as a strategic reference point for all activities and behaviours, although the respondents stressed that the corporate brand was not static and that it would evolve and change over time. However, the respondents also tended to place a specific emphasis in their views upon the centrality of the customer – which is perhaps not surprising given the management mantra of the past few decades. The importance of core corporate values was recognised as a reference point for the organisation, but these were often expressed in terms of customer relevant values, similarly the importance of relational networks within corporate branding was acknowledged, but again these were articulated primarily in respect of customer outcomes.

The future?
In this brief review of research into branding in retailing, we have attempted to argue that academic research has evolved from the level of the product to the level of the company, via the store. Whilst in many ways, this appears to be a simplistic hierarchy it represents a growing recognition that branding should be explored from a holistic perspective. The inter-relationships between these "levels" of retail branding should

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provide a future focus for research in retailing, and the corporate branding perspective would appear to be a crucial component.

In the *Journal of Retailing* special issue Ailawadi and Keller (2004) suggested a research agenda encompassing three themes:

(1) The development and application of traditional branding theory to retailer branding, specifically the concepts of brand personality, experiential marketing and brand architecture.

(2) The role of private labels in building retailer equity through issues such as category considerations, private brand tiers and positioning, branding (naming) options and brand extension and the response of manufacturers.

(3) The measurement of brand equity, which presents several serious challenges.

We would suggest that further work into corporate branding in retailing and the relationship to the store brand and product brand would clearly fit into theme (1) and contribute to themes (2) and (3).

One consequence of such a focus would be a re-think of prevailing research designs, approaches and methodologies. The concepts embodied within corporate brand research – as currently formulated – are less suited to the survey-based approach and analytical tools which tend to dominate published material on retail branding at present. A range of other approaches may be more appropriate, as proposed also by Uusitalo (2001).

Finally, we would justify the suggested focus on a holistic approach to retail branding because we feel it fits with the characteristics and competitive pressures facing the industry today. The very nature of retailing, presenting consumers with a combination of products, services and experiences, arising from business processes, interactions and relationships with a myriad of channel and associated stakeholders, would seem to make it an appropriate "case" for branding research embedded in the concept of the corporate brand. As retailing is conceptually viewed more and more as a process rather than a function, then relationships, behaviours, and the capturing of value becomes crucial to any business model. The retail product – at the item level, and to some degree at the level of the store – can be relatively easily copied, as one moves to more behaviourally based representations of the business model – encapsulated within the company vision, organisational cultures and behaviours – found at the corporate level, more resilient sources of differentiation can be found. The industry view of branding in retailing has moved on, our research focus should do so as well.

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