Modern marketing in disguise: creating value connections between companies and consumers
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Chapter 3    Methodology and Frameworks

3-1    Introduction
This chapter consists of what we could call a pit stop. Before continuing with the empirical part of my research I need to supply some fuel in the form of justification of the research methodology, the selection of the cases, and the framework of analysis.

In the discussion in sections 2-1 and 2-2 I have mentioned how postmodernism may have revalued interpretive research approaches by revaluing all things pre-modern (neo-interpretivism?). Interpretive methods are usually associated with humanistic studies like literature, history and cultural studies, whereas on the other side business studies have long been considered an ‘exact’ science, where inferential statistics are the means to ‘prove’ theories and models. I have linked the discussion on methodology to postmodernism not because interpretive methods are postmodern, but because postmodern approaches are more akin to an ‘anything goes’ stance. Further on in section 2-5 I have shown how methodological approaches of the definition and measurement of values can also be separated in reductionist and interpretive ones, to conclude that interpretive methodology is broader in scope and might thus be considered as including reductionism. In marketing the methodological discussion is more often about interpretive versus positivistic approaches, but in my perception the latter are dominant, as interpretive approaches are often considered propaedeutic to confirmatory statistics. For this reason I feel I have to justify why I am not using multi-dimensional scaling or structural equations modeling techniques. Moreover, in my opinion, a critical approach to methodology and epistemology is a basic activity of every academic, and it is also what different perspectives and disciplines should share: the discussion, not the method.

In this chapter, after a short discussion on marketing’s methodological diatribes in section 3-2, I will discuss how I have dealt with the information at hand to draw conclusions in section 3-3. In section 3-4 I will return to the consideration of the issues of value connection and marketing to develop a research framework that will help us go through the empirical part of the study and draw conclusions. In section 3-5 I am going to explain why I have chosen the four cases presented in the next chapters, and in section 3-6 I will show what data I have used, and why.
3-2 Methodological diatribes

Whereas the word ‘methods’ refers more to technical ‘tools’ for data gathering, methodology is defined on a more general level and is deeply related to the kinds of assumptions it holds about reality (ontology) and data reliability (epistemology). Many controversies between marketing scholars stem from different ontological assumptions, which imply different and mutually exclusive methodological approaches. Here I refer in particular to the discussion between ‘positivist’ and ‘interpretive’ scholars and journals.\(^{51}\) Whereas the former are aimed at finding all-explanatory theories as well as consensual ‘objective’ constructs that explain an observable reality, the latter emphasise the subjective and performative nature of reality, as well as the primary role of contextual and contingent factors (those not eligible to be measured in consensual ‘constructs’). Somewhat deceptively these different stances are often associated with the distinction between qualitative and quantitative methods. The terms quantitative and qualitative, however, merely refer to the nature of the data to be collected and therefore to the relation between research aims, methods, and ontological assumptions which could be pictured like in table 3-1.

<table>
<thead>
<tr>
<th>Qualitative</th>
<th>Positivist</th>
<th>Interpretive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploration</td>
<td>Exploration and explanation</td>
<td></td>
</tr>
<tr>
<td>Confirmation/Falsification</td>
<td>Exploration and explanation</td>
<td></td>
</tr>
</tbody>
</table>

Table 3-1: aims and methods in positivist and interpretive research

I have left out the aim of description from the table because that precedes every research enterprise, even if I think describing a phenomenon can be, or maybe should be more often, a final aim of research. I think that in positivist approaches descriptions are too quickly reduced to a set of items, survey questions (operational definitions) that are taken for granted in subsequent research. In other words: once a ‘valid’ construct is found, that responds to all the

\(^{51}\) According to Goulding (1999) this discussion is held since the 80s; see also Brown 1994: 48-49.
statistical requisites dictated by factoring techniques, there seems to be little or no discussion about a construct anymore, as if truth were found.\(^5^2\)

In traditional positivist research the linear research process is clearly divided in two phases: one of exploration through interviews and case studies, which leads to the identification of (mostly existing, pre-defined) measurable constructs and hypotheses, and a second one that is aimed at testing hypotheses through increasingly complex inferential\(^5^3\) statistical techniques.

Interpretive research processes are in general not as clear-cut, but inferential statistical techniques are usually not applied because they assume univocal causal relationships between two, often constructed, variables, an assumption that interpretive academics consider too general and thus rather simplistic. In this sense positivistic methods are reductionist: they aim at ‘reducing’ issues to a small number of variables instead of accounting for the inherent complexity of phenomena. Their aim is indeed to reduce this complexity. But there is more to demonstrate why these two approaches are often perceived as antithetical.

In positivistic approaches the unidirectionality of causal relations between variables poses a major problem: given two variables, one must always be the antecedent of the other, whereas the relation between the two can be very much iterative (especially when these constructs are difficult to observe). As a result often calls for more longitudinal research\(^5^4\) are expressed but find little following, mainly because of the efforts, time, and costs involved in longer-term research projects.

It seems that positivistic and interpretive perspectives are mutually exclusive since the ontological assumptions are contrasting: there is an objective reality or there is not. That is however not necessarily so. As Brown (1994: 49) points out, methods imported from literature studies, like discourse analysis, have their own set of rules as well, aimed at a hierarchical classification of knowledge, since a relation between theory and empirical results is agreed upon. Postmodernism on the other hand, in the words of Linstead (2004: 5) “questions the relation between the theoretical and the empirical” altogether and it “pursues

\(^5^2\) In my previous academic life I found, for instance, that marketers agreed on how to define and measure a construct like trust, but that posed big problems to the concept of satisfaction, also in causal terms: Is one trustful when satisfied? Or is it the other way around? I spent a whole EMAC conference session attending this self-centered discussion, and was in desperate need for a very large beer afterwards.

\(^5^3\) Inferential techniques are those where dependent variables are assigned and the effect of independent variables on these is assessed through the application of probability-theory techniques.

\(^5^4\) In longitudinal research samples are taken over time, as opposed to cross-partial, ‘one shot’ sampling techniques.
its ends not through homology, the elevation of similarities in the form of unity, but through heterology – a disconnected logic of the fragment”. So discussing methodology could be considered a modern, modernistic endeavor altogether, since it implies a search for a-priori rules stating when a claim can be considered scientific.

Regarding the relationship between theory and data, one more postmodern approach is that of social constructivism or post-structuralism (Hackley 2003: 152-54). This perspective assumes that reality in its totality is ‘made-up’ and implicitly agreed upon (even if it has ‘real’ consequences for people). It strikes me how methods like structural equations modeling analysis are increasingly sophisticated and pretend to univocally measure these social constructions, as if these were really somewhere in our heads.

In my opinion not only the history and context of the phenomena should be accounted for, but also those of the researcher. As Feyerabend (1975:45) says: “the material which a scientist actually has at his disposal, his laws, his experimental results, his mathematical techniques, his epistemological prejudices, his attitude towards the absurd consequences of the theories which he accepts, is indeterminate in many ways, ambiguous and never fully separated from the historical background”. So one more limitation of the reductionist, or means-end, modernistic approaches to science, is the lack of historical consideration. Indeed, longitudinal research is often advocated as a means to find causal relationships that hold for a longer period of time.

Evolutionary inclined researchers contend that it is only by looking at patterns in history that we can understand the present context. According to Saad for instance (2007:13) history does not guide human nature, but it is the other way around: human nature influences history. Both are actually true: genetic factors influence cultural preferences (think, for instance, of how Asian people cannot stand diary products) and at the same time cultural factors influence biological evolution. Genes and culture co-evolve. Still according to Saad “culture is a particularly effective means of modifying natural selection pressures and driving the population’s biological evolution” (ibid: 7). So culture also influences genes indirectly, as it where, by influencing natural selection (the ‘direct’ model is referred to as cultural selection).

One important feature of evolution as a paradigmatic approach is that error and chance are allowed for as major features explaining phenomena, since that is how mutations and thus variation come about. This is opposed to positivistic approaches where error and bias have negative connotations. Indeed, statistical modeling captures and reduces uncertainty into one
parameter, the epsilon, which at the end of every equation is supposed to estimate and take away all bias due to chance and measurement faults. Moreover positivistic confirmatory statistical methods are aimed at either refuting or accepting a hypothesis, i.e. there is no possible third way. Evolutionary explanations ‘only’ describe and explain, in the sense that they offer a plausible algorithm, a mechanism explaining the process of evolution (and mutatis mutandis of a marketing strategy) without necessarily adhering to the search for an ultimate cause; there is no etiology. In other words, positivistic approaches tend to force meaning where there is only contingency.

So far I have introduced the distinction between positivism and interpretivism, but I have also said that interpretive approaches are not necessarily postmodern, as they still set rules. I have also explained how context and history should be included in every analysis, and not ‘controlled-for’ as e.g. in experiments. Finally I have found that evolutionary perspectives may be the most realistic ones in that they not only account for history and context, but also for chance and error. Now I have to put it all together in a pluralist (or anarchistic though not rule-free!) approach.

We could reduce the positivist-interpretive discussion to a difference in levels of analysis and focus. Inferential statistics are the means to find relations between two distinct variables, and this adds knowledge on a very particular (proxy) level, since it always assumes the ‘ceteris-paribus’ condition (all other things equal). Interpretive approaches offer inclusive (domain-independent or multidisciplinary) and comprehensive explanations. The output of interpretive research is mainly stories, narratives. Stories are more adaptable, interpretable, and allow for the necessary subjective interpretation that tested theories tend to eliminate with the introduction of the term ‘bias’. In what we can consider a multi-level approach, the idea of bias is conceivable on a level where consensus amongst researchers is possible (we all agree that there is some predictable effect like gravity). But on a more particular level one cannot answer the question: bias against what?

As I briefly mentioned before, in positivist, confirmatory approaches an hypothesis is per definition accepted or rejected, i.e. there is no option in-between, and a ‘slight’ acceptation (e.g. a weak but ‘significant’ estimation) can have quite large consequences, since a paper gets published once it confirms existing theory. But when is a theory confirmed? As Feyerabend (1975: 45) notices “according to our present results, hardly any theory is consistent with the facts. The demand to admit only those theories which are consistent with
available and accepted facts again leaves us without any theory”. Feyerabend’s only solution to this admittedly epistemological impasse is ‘anything goes’, although not in the sense of Heraclites’ ‘Panta Rhei’ but in the sense that the more competing assumptions, explanations and data there are, the better; methodological anarchism is the rule, and the only principle that does not inhibit progress (Feyerabend 1975: 7). I am inclined to just take and defend an anarchical stance in the observation of rules dictating how much weight to give to information, and which information should reflect reality or truth more or less reliably.

Methodological anarchism, however, does not imply a total absence of method. ‘Trial and error’ can be considered as the most natural of methods. In this respect Beinhocker (2006) talks about ‘deductive tinkering’, which allows both rationality and purpose. More precisely: “evolution is an iterative process of experimentation, selection, and then amplification of things that work” (Ibid: 249). That iterative process is the deductive tinkering process which simply means that generating knowledge happens through some deduction from mental models and at the same time experiments that may be totally arbitrary. Arbitrarily looking for empirical data is what Feayerabend also refers to as ‘counterinduction’ (Feyerabend 1975: 56), that is how “ideological ingredients of our knowledge and, more especially, of our observations are discovered with the help of theories which are refuted by them”. According to Feyerabend, advances in science do not occur by using data to confute theory, but rather to use data to confute the ideological foundation on which theory rests.

3.3 The research process: inferring meaning from data

To challenge the ideological foundations on which theories rest one must allow for multiple interpretations of observations, and continuously look for new and alternative explanations. This transcends multisciplinarity because it does not consider knowledge as consisting of separate disciplines, but suggests a more comprehensive and inclusive view on knowledge. This stance, however, might be considered ideological in itself, since scholars should start doing research in a ‘tabula rasa’ (without ideology and history) mode, which is not very realistic.

55 Randomness is at the basis of statistical research, but life is a bit different from a lottery. In evolutionary approaches apparent random, mostly human, processes are always the result of rationality and purpose also, since these are products of evolution as well.

56 Or logic, since it leads to a redundant kind of reasoning: being totally without history one can not choose either which data are relevant for interpretation.
When the process is one of continuous, iterative theory development and confirmation, the research approach is often referred to as ‘grounded theory’. This approach stems from the social-anthropological tradition (Glaser & Strauss 1967), and has been extensively applied and debated in marketing also when referring to research techniques like ethnography and action research (Carson et al 2001: 62). The following shortlist proposed by Goulding (2005) gives a concise overview of the main characteristics and application of grounded theory in marketing:

- Comes from sociology: society and the individual
- So far only ‘used’ for measuring experiential consumer behaviour (context) and not for theory development (limited generalisability)
- Based on symbolic interaction
- Meaning is constructed through symbols of various shapes and forms
- Attacked in the 50’s for being ‘unscientific’
- Glaser and Strauss (1967) formalise the approach
- Iterative Process: data-theory
- No a-priori model. Knowledge ‘grounded’ in phenomenon
- No purposive sampling: approach those thought to be knowledgeable
- New knowledge leads to new venues
- Open-coding techniques/line-by-line or Inducted coding (axial coding)
- Transcends specific data collection methods ‘Rules’
- Theoretical sampling
- Constant comparison
- Core category ‘Fit’ in extant theories
- Applied in the fields of: Ethical, Green, Social, Experiential marketing

Given that we are never without history, and that prejudices are thus inevitable, the elements that I would highlight are the iterative nature of the process of confrontation of data with extant theory, the fact that the approach focuses on symbolic interaction and social construction, and the fact that it transcends data collection rules. As I have just mentioned, grounded theory as a methodological standpoint allows the researcher to challenge the rules as it were, and in doing so he is not aiming at falsifying theories (in the terminology of Karl Popper) but aiming at refining, adjusting, and enriching previous findings by confuting the theoretical premises and assumptions (i.e. the ideology) on which these findings are based. This means the aim of interpretive research is one of theoretical rather than statistical generalisation.

The nature of these two types of generalisation could be summarised as follows:
- *Statistical generalisation.* Are the findings valid for the whole population, i.e. can we say that the relation between two or more defined variables holds throughout the population? Or else: is the sample representative under scrutiny?

- *Theoretical generalization.* One of the key indicators of validity is replication, and different cases could also be regarded as quasi-experiments to be replicated.\(^5\)\(^7\) The ongoing question is: do the findings inferred from one particular case also apply to other cases? The result is to uncover issues that might explain differences as well as similarities. The replication of findings across more cases is thus not aimed at confirmation of univocal causal relationships but rather at adapting and refining existing explanations.

Consider finding data that do not match with extant theory. The aim of statistical generalisation then is that one must conclude that, since the theory does not hold across the (estimated) population, it must be refuted. An aim of theoretical generalisation would maybe lead to richer explanations, keeping in mind that ideology, paradox, and error are inherent features of what we call reality. This does not exclude the added value of statistically significant results, but research that is statistically not valid should be all the more significant for developing richer explanations.

Therefore the difference between positivism and interpretivism lies not so much in the rules used for collecting data but rather in how to draw conclusions from observations. Concluding I think that the two stances just represent different ‘propensities to subvert the rules’.

### 3-4 An integrated research framework

In chapter 2 we have seen that the values represented by a company’s proposition are always contextual in socio-cultural terms and that brands sometimes act as attractors i.e. they activate people, triggering them to gather or at least to share. Then I have combined these perspectives into an indicator of the kind of value connection between companies and consumers called the Glue Value of brands (hence the denomination qualifier instead of quantifier in the operational approach). We have seen that higher categories of Glue Value imply that 1) the

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\(^5\) Cook and Campbell (1979) define quasi-experiments as ‘Experiments that have treatments, outcome measures, and experimental units, but do not use random assignments to create the comparisons from which treatment-caused change is inferred. Instead, the comparisons depend on non-equivalent groups that differ from each other in many ways other than the presence of the treatment whose effects are being tested’ (Cook and Campbell 1979: 6).
cultural reference system to interpret the value proposition implied by a brand is smaller and 2) consumers are triggered to engage in group activities. How does that relate to our discussion about hyper- versus postmodern marketing approaches? Hypermodern attempts to create a value connection, which implies the possibility to predict and address consumer behaviour, for instance through the creation of extensive databases that generate profiles typifying consumers. Such attempts are also advocated by marketing scholars to help the marketing field to recuperate its reputation as a science. Postmodern approaches are not assuming possibilities for control, and hence allow for contributions of consumers (or from consumer tribes). They do not try to influence the perception of the brand but rather adapt to it. The question we were left with in the previous chapter, when considering the different Glue Value of the otherwise similar brands Nutella and Marmite, consisted of the relation between marketing as an activity consisting of attempts to establish value connections and the Glue Value of a brand.

Now that we have a Glue Value qualifier, we also need something like a HyPo marketing qualifier, and this qualifier must take into account possibilities of spontaneous action from consumers or from the demand side. The overall framework of analysis could be depicted as in figure 3-1, where I take into account the ‘performative’ function of the Glue Value, i.e. the Glue Value of the brand is not only the result of initiatives companies and consumers take regarding the brand, but the other way around counts as well: initiatives companies and consumers take regarding the brand are in turn informed by its Glue Value. By doing so I take into account history, and hence possibilities of ‘feedback loops’ (cfr markets as CAS in section 2-7). In figure 3-1 two lines are scattered because the Glue Value as such is not intentionally active. The activity of companies and consumers are what I refer to as marketing activity surrounding the brand.

58 Looking for ways to control the brand still typifies most research in marketing. See for instance the publications of a Dutch branding research group, the SWOCC (see www.swocc.nl). In one publication ‘The armed consumer’ (de gewapende consument) market resistance is not taken as an opportunity for understanding consumer behaviour, but as an obstacle to overcome. In the context of branding and social media most research is aimed at attempts to control reputation. In other words, by definition management is mostly considered an activity of control.
With the help of this figure one can also understand why my approach has to be longitudinal. Looking at one particular case or moment in time we might see that consumers were taking marketing initiatives, but this might have been exceptional. Only by looking at the case over a longer period can one conclude whether the company has been more concerned controlling the perception of the brand or allowing for consumer inputs.

One of the main questions of this study is if, and to what extent, companies try to retain control over the perception of the brand. What I just mentioned is one way the framework helps to uncover that. Another way is to look more in-depth at the kinds of marketing approaches employed by companies, whether these are leaning towards the left or the right of the HyPo dimension. On the other - demand - side we also need to ascertain the extent of consumer activity surrounding the brand. Table 3-2 summarises this part of the research framework. Considering marketing as an activity of valuation, I have developed three indicators that capture the nature of the activities surrounding the brand: adding values, activating, or spreading the message and peer activity. The double perspective is evident in table 3-2 from the distinction between identity (how the firm sees itself) and image (how consumers see the brand) and from the small s and d which stand for supply and demand sides respectively.

<table>
<thead>
<tr>
<th>Glue Value</th>
<th>Adding Values</th>
<th>Activation</th>
<th>Peer Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identity</td>
<td>AVs</td>
<td>ACs</td>
<td>PAs</td>
</tr>
<tr>
<td>Image</td>
<td>AVd</td>
<td>AVd</td>
<td>Pad</td>
</tr>
</tbody>
</table>

Table 3-2: An integrated framework of analysis
The Glue Value is represented on the left because of the resemblance of this model with a logical formulation like: \( GV = f(AV, AC, PA) \), i.e. the Glue Value of the value connection is a function of Adding Values, ACtivating the message and Peer Activity.

**Adding values (AV)**

AV indicates whether the firm is more or less explicit in defining the values of the proposition in terms of related purchase benefits for consumers (or what I have referred to in the previous chapter as intertextuality). So, for instance, a publicity message can suggest more or less explicitly how to use the product for specific purposes, or in specific situations, i.e. why and in what context one is supposed to use the product or show the brand. Conversely, the demand side tells us to what extent consumers are defining this. An extreme example of a conflict between AVs and AVd is that of the company Mattel that decided to sue consumers who were dressing the Barbie doll in ways not intended by the company. Eventually Mattel understood that involving consumers could make a strategy more successful (Wipperfurth 2005).

**Activating the message (AC)**

AC is an indicator of the extent to which consumers must take initiatives to spread the message. From the company’s perspective it estimates the amount of consumer activity required to activate communication. For instance placing a billboard requires less consumer activation than publishing a video on the internet. On the demand side it measures the extent to which consumers are involved in spreading the company’s message. In the most extreme case consumers, for instance, spontaneously create and spread videos concerning the brand.

**Peer activity**

PA tells us if the marketing initiative of the company aims at bringing people together, like it would be the case with e.g. the organisation of an event or of a discussion blog in the internet. On the demand side it tells us to what extent consumers are sharing opinions, objects, and space concerning a particular brand. A most extreme case is that of the already mentioned Nutella parties. As Cova and Pace (2006) show the producer Ferrero was initially not even aware of these. More concretely I will classify the data according to the qualifications as presented in table 3-4.
**Supply side, or company intended input**

<table>
<thead>
<tr>
<th>AVs</th>
<th>Benefits are clear and explicit.</th>
<th>Benefits must be interpreted in relation to some shared knowledge.</th>
<th>Benefits are discriminating but not controversial.</th>
<th>Benefits are generating controversy.</th>
<th>Benefits are implicit.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACs</td>
<td>No activity is required from consumers to activate the message. Engagement is not sought after.</td>
<td>Consumers need to ‘do something’ to activate the message. Engagement might consist of a system of rewards and punishments.</td>
<td>Consumers need to repeatedly ‘do something’. Engagement consists of the explicit creation of a playground where the borders between commercial and private fade.</td>
<td>Consumers should not only be active to receive the message but also to spread it. Engagement is sought after in a more iterative fashion.</td>
<td>Consumers spontaneously engage, create means for spreading the message.</td>
</tr>
<tr>
<td>PAs</td>
<td>No peer activity is intended.</td>
<td>The company creates occasions where consumers necessarily gather (e.g. to get a special discount).</td>
<td>The company creates virtual spaces where consumers can share.</td>
<td>The company creates both virtual and physical spaces for consumers to gather.</td>
<td>The company gives consumers the means to organize peer-activities related to the brand.</td>
</tr>
</tbody>
</table>

**Demand side or consumer input**

<table>
<thead>
<tr>
<th>AVd</th>
<th>Also loyal consumers switch to alternatives brands offering the same benefits.</th>
<th>Consumers adapt the brand/product to their likings but use it for the intended benefits.</th>
<th>Consumers use the brand as a self- and social identification means.</th>
<th>Consumers use the brand to relate to those ‘in-the-know’.</th>
<th>Consumers use the product/brand in contexts different from those intended by the company.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACd</td>
<td>Consumers are passive.</td>
<td>Consumers must get hold of the medium (e.g. specialised magazine).</td>
<td>Consumers register for playing a game, entering a website, receiving a newsletter.</td>
<td>Consumers are actively spreading virals, creating content.</td>
<td>Consumers spontaneously engage in activities to promote the brand.</td>
</tr>
<tr>
<td>PAD</td>
<td>Consumers are not spending extra resources in activities related to the brand than necessary.</td>
<td>Consumers spend time sharing opinions about the firm’s proposition.</td>
<td>Consumers share more than just opinions about the brand, and spend resources in related activities.</td>
<td>Consumers are fans; the brand acts as a ‘strange attractor’. Consumers go to brand-related gatherings.</td>
<td>Consumers are daily involved in peer activities related to modifying the proposition of the company.</td>
</tr>
</tbody>
</table>

Table 3-4 Measuring marketing as company versus consumer input.

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60 In Chaos Theory these attractors are points of convergence in unstable, dynamic contexts.
To come back to the longitudinal level of our framework, the question was if and to what extent the company tries to retain control over the image of the brand over time. This requires a supply side perspective, as well as a research framework of its own that takes various levels of interaction between a company and consumers into consideration.

Kapferer (1997) identifies three layers in the activity of brand management according to the extent to which the results of the management activity are subject to change. At its core (tier one) the core of a brand’s personality must be defined and stable as it informs of consistency in perception. On a lower, second level, marketing managers must define the ‘tone of voice’ of the brand, i.e. the visual and verbal identifiers of it. On a third and lower level the brand must ‘get alive’, so this level concerns the materials (location, marketing means) as well as the themes of e.g. an apparel collection. So Kapferer draws a pyramid at the top of which the core of the brand is defined, in a second tier it’s style or ‘tone of voice’ and in a third one e.g. campaign themes. I would add another tier to the top of the pyramid because, before thinking of what the brand values are, company executives decide about what to make and for whom. Therefore the meaning of the value proposition is broader than just the brand values (in fact, there are cases where a company keeps on doing the same, but needs to change the brand, most notably in the fast moving consumer goods or telecommunications sectors). So I have extended and modified61 Kapferer’s pyramid to introduce the Value Connection Pyramid which looks like figure 3-2.

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61 A methodological observation: I have adapted Kapferer’s model before I knew of it. Analysing the Diesel case (chapter 4) I asked myself how the brand managed to be so consistent and innovative at the same time. I interpreted the data, built my pyramid, and subsequently came across Kapferer’s model and elaborated on that. So here we clearly see the iterative premises of grounded theory at work, and this is also a good example of theoretical generalisation.
As one can see in figure 3-2, every lower tier involves taking into consideration a new dimension, or a subsequent question:

Tier 1: What does the company do and for whom?
Tier 2: How does that translate into a set of brand values to communicate?
Tier 3: Which consumers does the company want to address?
Tier 4: How often does the marketing mix change?

The first tier of Kapferer’s pyramid should be as stable as possible, the second one is contingent upon longer-term cultural and social trends, and the third tier is the most dynamic one. In my value connection pyramid this kind of argumentation still holds. With respect to the question of control that I have posed in relation to hyper- versus postmodern approaches to marketing, it will help us to discern to what extent a company tries to keep control. More specifically it will help us to understand if and to what extent a brand is co-evolving with its environment (i.e. how dynamic are the tiers?).

So far I have presented a synthetic research framework which includes two sub-frameworks, one that helps us to look at a particular, and one at a more general level of analysis. We should now be able to investigate the following:
- What is the relationship between the Glue Value of brands and marketing as an activity of valuation?
- To what extent does a company need to stay in control of its brand?

In doing so I hope to find out which mechanisms lead to the establishment of what kinds of value connection, and how these relate to social, historical, cultural, and business contexts. But before starting with the empirical analysis I still have to introduce the empirical setting of the research, i.e. the cases, as well as to justify the choice of the data collection methods I used.

3-5 The cases

In the search for cases to analyse I have looked for companies that I felt have a particular type of value connection with consumers. This meant that first of all these had to be brands with which some consumers have a strong emotional, as opposed to calculative, commitment. This becomes evident from the kind of reaction they provoke when mentioned to interlocutors, whether they elicit a grin, a smile, or some kind of emotional reaction that indicates how these brands managed to add meaning that is immediately felt, recognised, and shared among users and non-users alike.

According to Cova and Svanfeldt (1993) a characteristic of successful companies in times of ‘aesthetic hedonism’ and ‘trivialisation of art’ is to be innovative in changing the relation between a product and its users, instead of being innovative in technologies or in adding functionalities.\(^{62}\) The brands also had to be successful in terms of brand recognition for at least ten years (up to 2010).\(^{63}\)

This led to the choice of Diesel, the Italian fashion company; Innocent Drinks, producer of smoothies or pure fruit drinks; Mini, the car brand initiated by the British Motoring Company, and its younger brother MINI of that is owned by BMW .

I also chose these three brands because they are active in totally different markets, i.e. apparel, diary/soft drinks and cars. By doing so, I hope to, albeit partially, control the industry and product-functionality related factors to distill those that are related to the emotional aspects of

\(^{62}\) Apple for instance would not be suitable according to this criterion because it is, has been, also innovative in the technology, i.e. it allowed consumers to access new functionalities.

\(^{63}\) This because given the relevance of the social context, one could argue that a ‘zeitgeist’ typically has a time-span of at least ten years, i.e. the 60s, 70s, 80s, en so on.
the company-market interaction process. Looking at this process in all four brands can be considered consumer-oriented.

One might argue that the companies under consideration have different sizes, size being a determinant that seems to explain many marketing variables, as bigger companies have the necessity, ability and know-how to develop longer-term strategies and are better at organising market feedback. Coviello et al. (2000) however find little evidence of large differences between smaller and bigger companies when discussing relational approaches to marketing. According to Ormerod (2006: 15) as well, after the first few years of existence the difference between a large and small firm’s survival potential narrows dramatically, which means size is never a decisive factor.

\textit{Diesel}

For Diesel the aim of creating an iconic brand was there from the very beginning, in the late 80ties. Currently the vision of the company reads as the intention to create one of the world’s top-ten most iconic brands, and it managed to do so with respect to the jeans market, but even with respect to other markets: in 2005 Diesel was ranked the number one most ‘cool’ brand in the Netherlands and number six in Europe, next to brands like Apple, Google, Nokia, Puma, and Adidas. What is most interesting about this brand is that unlike many other casual wear brands which were popular during the 80s (such as Benetton, Carrera, Levi’s, Wrangler) it managed to maintain its ‘cool’ and fresh image to-date.

\textit{Innocent drinks}

Innocent drinks does not have as long a history as the other cases, but managed to gain a 70% market share in the ‘smoothies’ category in less than ten years in the UK, despite the soft-drinks market being dominated by big players like Coca-Cola, Pepsi, or Nestlé which had

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64 In a relational approach the aim of a company is not to maximize the number of transactions but the quality of relationships with its customers.

65 Weekly Facebook fashion index: most popular jeans brands AFP - RELAXNEWS (English International Version), May 4th, 2010.

66 http://www.marketingfacts.nl/berichten/diesel_meest_coole_merk_van_nederland/ (June 2006)
money, know-how and distribution networks. The presence of these companies was actually the reason why it was very difficult for the founders to raise the money necessary to start the company. In other words, no investor, in a time when venture capitalism was popular, believed it was possible to become a significant player in a fast moving consumer goods market like this one.\textsuperscript{67}

\textit{Mini and MINI}

One name, but the first spelled is small letters and the other in capital letters. These are indeed two cases concerning the same brand, but introduced and marketed twice as it were, in different historical and social contexts. The history of Mini goes back to the 60s when it acquired a high symbolic status that lasts till today. Although the car acquired an iconic status almost immediately, the more recent history of the brand shows that maintaining and exploiting that status is not as straightforward as it might seem. Most notably in 2002 the British brand was acquired by BMW which created a new version of the car according to contemporary safety and convenience standards, and marketed it in a way that leveraged its values, and addressed a new geographic market, the USA. In this case there are two questions: one is how and why did the original car acquire and maintain an iconic status which was never intended by the British Motoring Company (or BMC which, after a series of mergers and acquisitions, became British Leyland in 1975), and two: did the Bayerische Motoren Werken (BMW) manage to reinforce and keep this status?

These four companies managed to stand against the odds and survive in markets where competition is fierce, and they might therefore help us to find out what having a ‘real’ value connection between a brand and consumers means, and to shed light on how marketing contributes to creating it. As I have stated in chapter 1 these questions are necessary to understand when marketing or brand managers should try to influence or manipulate perceptions and consumer behaviour in order to establish a ‘real’ value connection. In the search for an answer to the research question(s) I have kept in mind sub-questions like: how did these brands actually manage to survive? Can their success be attributed only to the ‘excellence’ of marketing savvy managers? Did the environment help them in a serendipitous

\textsuperscript{67} Apparently size matters for reasons other than resource availability and long-term orientation, and only given a specific environmental context. In fact the discussion about the alleged irrelevance of size above does not mean we will not consider firm size as a contextual factor.
way? Or was it both? These are questions that have been tackled already by several writers who praise the innovative marketing of the companies. By comparing the cases, however, we may bring some nuance in these praising explanations.

3-6  A fuzzy-interpretive approach to measurement

In order to measure the HyPo dimension I had to develop some kind of scale. I did, however, not have a list ‘on the shelf’ of pre-defined items relating to objective constructs, for one because I recognise that the interpretation of data is always contextually mediated. When empirical data are emergent, open to interpretation, and potentially explaining more indicators in various intensity (in other words, non-linear and probably not normally distributed) then a quantitative approach gaining popularity is the use of fuzzy scales. According to Varki et al. (2000:481) “fuzzy data, or data sets that include fuzzy items, are common in content classification. This occurs whenever items vary in the intensity to which they belong to different categories, even when the categories are distinct and well defined”. Moreover Visvanathan et al. (1996:458) note that “traditional scales, by requiring the choice of a single response category as a response, cannot provide information on the extent to which a response category captures respondents' natural responses.”

The attempts to define and further develop the use of scales based on fuzzy, non-linear sets, is, to my knowledge, still mainly aimed at quantifying objective constructs that constitute a deductive, reductionist nomological model. I, however, would like to employ the concept of fuzziness in an interpretive context, i.e. one of multiplicity of interpretations. I have done so by developing categories (HyPo I until V in section 2-2) instead of a scale. Besides allowing for multiple interpretations, categories are not ordinal, i.e. they do not necessarily imply a hierarchy (i.e. a lower HyPo class is not ‘less’ but just different from a higher one).

As I have said before I reject the idea of bias in the interpretation of data, since the concept implies the existence of an objective theory. Instead of that I have to deal with the reliability of information. The act of considering data as present in the fuzzy realm in between the collective, or objective, and subjective views on reality (or mutatis mutandis in between a rejected and an accepted hypothesis), is referred to as ‘inter-subjectivity’. 68

Even if objectivity does not exist, that should not restrain us from looking for it, just like perfection, or love; in this sense I would use the term neutrality instead of objectivity. A researcher should have a stance that is as neutral as possible, and reflection about one’s own influence and possible preferences on the interpretation is essential, as also implied in the premises of grounded theory. In a way this is similar to what Feyerabend called ‘counterinduction’ (cfr section 3-2). So there are two ways to become as neutral as possible: 1) use an iterative instead of linear research process and 2) reflection on one’s own influence on the results. I have dealt with the first point by starting to look at data, like accounts of company’s marketing strategies and consumer reactions, and at the same time searching for new theory and alternative explanations and data (see e.g. footnote 11 in this chapter). Concerning the second point I have added, whenever possible and without wanting to be pedant, references to personal experience and literature that might have influenced my interpretations. Adding to that I have always discussed my findings in more or less formal settings with fashion students in classes, but also with experts (like e.g. fashion experts concerning Diesel) and peers (like e.g. people who experienced the 60s prima-persona, to find out, for instance, that the choice for a Mini was quite often an economic rather than a lifestyle one).

Hackley (2004: 11-12, referring to Thompson 1994) when commenting on hermeneutic processes emphasises that “this dialogue between reader and text then proceeds through subsequent iterations of a circular process that (...) tends towards its own correction”. That is, it tends to, but never reaches this.

One often stated (and quite intuitive) ‘rule’ concerning reliability of data, is that of triangulation, which simply means that for information to be reliable it should be confirmed by at least three different sources (Perry 1998). Geometrically this makes sense if one thinks that, for instance, as a navigation technique one always needs to survey three different bearings in order to determine one’s position with any accuracy. I have used the internet as one source of primary information (as explained in section 1-8) by analysing discussion groups, fan websites, newsletters, user posted videos and pictures, and I have also looked at the databases LexisNexis and PressDisplay containing newspapers articles about the

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69 In other words, no matter how hard we try we can never observe ourselves from ‘outside’.

70 For example, my mother used to have a blue Mini with a white roof that always had problems with the braking and steering. This might have given more weight to some information I retrieved about the aesthetics and quality of the car. Neither did I ever find the Innocent smoothy as tasty and wholesome as described in most accounts by consumers and journalists, which led me to give less weight to very positive accounts in these evaluations.
companies in question. An extract of the chronologically ordered information from the perspectives of supply (what did the company do and declare), demand (what do journalists and consumers comment about), and the product (what are product variations and introductions) is given in the appendixes.

Next to using the press and the internet as primary data sources, I have conducted multiple interviews with marketing representatives of Innocent Drinks in the Netherlands (right before the marketing department in the Netherlands was closed in 2009), and with marketing representatives and the general director of Diesel for the Benelux. Multiple interviews were held over a period of at least two years.

To generate the indicators of the HyPo dimension multiple discussions were held with students of the Amsterdam Fashion Institute during four semesters. Students were asked to collect examples of hyper- and postmodern approaches in marketing and rank them on the scale. During the presentation of the assignment fruitful discussions led to further refinement of the indicators. Students were also asked to gather information about Diesel consumers in the Benelux. Using students for research presents limitations in that the researcher’s role in the interpretation of the findings is difficult to ascertain, particularly when the research is not structured. However, students knew the brand communities they explored better than me as well, because they are often part of it, and next to their interpretations they were asked to collect primary, ‘raw’ information that I have interpreted.

3-7 Conclusion

In the introduction I have said that this chapter was a kind of pit stop, since we needed to take in some fuel in the shape of tools and justification to go on with the empirical part of this study.

I started off broadly with fundamental questions like ‘is there something like ‘reality’ out there”? I ended up with more specific questions concerning the little pieces of that assumed reality that we are looking for.

In the first section I have presented the different perspectives on epistemology in marketing research in more detail. The main conclusions from that presentation are:
Postmodernism has helped to revalue interpretive views in marketing research, because it has questioned the long held equivalence: between science and numbers (inferential statistics).

No methodological stance is superior to another, but one must be clear concerning the level of analysis in a research effort which can be particular, analytic, or general, more synthetic.

Methodological anarchism does not necessarily imply absence of rules, the most important one being to be able to ‘triangulate’ information by using a variety of data sources.

I have also introduced my approach in terms of fuzziness, and explained how the HyPo dimension and its application to the value proposition and marketing could be considered a qualitative fuzzy scale. In this sense the Glue Value indicator is to be considered a sort of qualifier instead of an ordinal scale.

In section 3-4 I came back to the subject matter to introduce a framework that will help us understand the Glue Value of brands and its relation with hyper- and postmodern marketing approaches (i.e. our main question). Considering marketing as an activity, I have developed a framework that represents it in terms of supply- and demand-side activities aimed at: adding values to the value proposition implied by the brand, spreading the message, and triggering virtual and physical gatherings around a brand. In the case analysis I will use this framework to analyse specific marketing initiatives. In order to further understand to what extent a company tries to stay in control of the brand, I have also constructed the Value Connection Pyramid. This pyramid consists of four tiers, each one adding one (rather large…) brick to the bridgehead a company tries to establish with consumers. This means that the pyramid is supply-oriented only. By looking at the extent to which the pyramid’s tiers vary in time we can ascertain the co-evolutionary tendencies of the company.

I have also presented the cases and justified my choice for them. Two of them were the initial criteria:

1) A strong image based on intangible values and

2) An apparently strong value connection with some consumers.

On the other hand, to be able to distill some communalities the companies had to be of different sizes and history, as well as operating in different industries. The brands of choice
are Diesel S.p.A., Innocent Drinks, Mini (BMC) and MINI (BMW). Finally I have described which data sources I have used and why.

After this pit stop, it is time to hit the road again.