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We would argue that even the withdrawal of all Virgin products from their markets would not suffice to kill the brand. This is largely because branding involves the two types of internal, psychological responses that consumers may have to environmental stimuli and events, affect and cognition. Affect concerns feelings, ie 'I like Mazda cars', while cognition involves thinking, ie belief that Diet Pepsi is not fattening.[14] The two systems are richly interconnected and each one influences and is influenced by the other.

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The logic of brand revival or recyclability is that some old brands are buried in consumers' psyches and as such may still have value. These 'dormant' brands are more likely to gain readier acceptance by due to consumers perceiving Nivea as a national brand.

CONCLUSION

No doubt there are many benefits that may be derived as a result of global branding, and perhaps many more downsides to brand proliferation, especially in instances where brand extensions are simply 'me-toos' which can no longer justify their space on retailers' shelves. There may also be many instances whereby it would be wise for global players to rethink their plans for culling their comatose brands in particular. With the realisation that they are unable to erase these brands from consumers' minds, they may find that there are opportunities to be derived from the equity inherent in these brand names.

Should a firm feel the necessity to prune its brand portfolio, it should ensure that its strategies for brand deletion are as well planned as its strategies for brand development. Brands that have been selected for deletion should be disposed of in terms of their suitability to others, ie as a potential acquisition; as a brand alliance or joint venture; or as a name to be licensed. It should always be kept in mind that a brand which has achieved a level of awareness sufficiently high for it to be deemed a comatose brand is most likely to have sufficient residual awareness and goodwill for its value to a domestic market to be further enhanced by entrepreneurs, or key national retailers. They should not forget that one company's disposal of interests amounts to another company's brand expansion. Recognising that the consumer is also an employee, one who in some instances may stand to lose more than he or she will gain from the process of globalisation, it may be that future brand portfolio policies should be driven by being 'as local as possible, as global as necessary', even if this is only aimed at the consumer's mind. As Mitchell[31] notes, 'over the next few years the real tests of marketing skill (and the real displays of ingenuity) may not be from among the well resourced, head-line grabbing "power brands" but from smaller brands that no longer have the muscle to play the marketing game by its old rules, but see advantages in the gaps created by big firms clearing the weak and sickly from the brand undergrowth'.

As the inexorable logic of size and power derived from globalisation continues to drive corporate strategies, the social and political trends suggest that consumers are yearning for the opposite — the warmth that local identity or cultural roots provide. It may be true to say that, for the time being, global brands are enjoying powerful growth in Central and Eastern Europe where political fragmentation has already taken place. However, when the dust settles and the national brands have mostly disappeared from the shelves, the new reality of global brand domination may well inspire a shelf revolution against 'economi-colonial' rule.

In the developed countries, consumers may be buying 'power brands', but they too, are searching for community and identity. Perhaps the ironic result of brand culling will be the opportunities it opens up for a new raft of genuine national niche brands. The global corporations may find themselves once again in need of national brands and national production and then it may be too late. This paper has predominantly focused on brands in the product, rather than services, domain since branding is not as well developed in services. However, as a more sophisticated approach is adopted to services branding, there may well be lessons that can be learned from culling in the product sector. The message to the cullers is beware of culling brands without a broad ranging analysis or they may come back to haunt their parental corporations.

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The era of brand culling — time for a global rethink?

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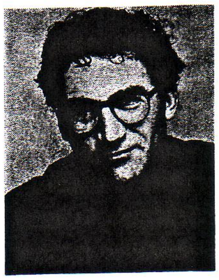

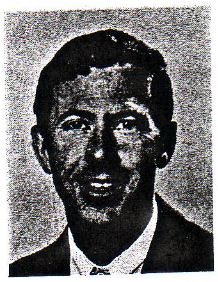

Top: Philippe Mihailovic
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Leslie de Chernatony *is the Beneficial Bank Professor of Marketing at the Open University Business School. With a doctorate in branding, he has a significant number of publications on branding in European and American journals, and is lead author of the popular text, 'Creating Powerful Brands'. He has run branding workshops in Europe, the Middle East and Far East. Professor de Chernatony is a member of the Editorial Board of* The Journal of Brand Management.

ABSTRACT

This paper argues that the more the world moves towards homogeneity, the greater the likelihood of it fragmenting into tribal segments with vested interests in protecting their national economies. An informal, grass-roots protectionist backlash against the threat of foreign brand domination may appear on the agenda as a response to global corporations culling some of the only national brands left in their portfolios.

These tribes will have witnessed some famous factories closing and redundancies rising as the global corporations strive to become more efficient and profitable. They will have seen some of their national brands dissolve into global brands or simply disappear. Some may even feel that an economic coup d'état has taken place in a new form of colonial rule which may eventually lead to the underdevelopment of their national economies.

Global corporations would be wise to reconsider their brand-culling strategies and assess whether they have fully capitalised on the equity of lesser brands. Instead, brand divestment could provide a means of forging greater alliances with national retailers or stimulating small business ventures.

INTRODUCTION

'The Great Brand Cull has begun in earnest as major marketing-led companies focus on their power categories and the power brands within them', stated the editorial column of a recent issue of *Marketing Week*.[1]

In April 1994 Unilever announced that they planned to axe a fifth of their brands.[2] Over the next two years, the range in excess of 1,000 different products is to be cut back, to enable Unilever to concentrate on its core brands. This news coincided with the announcement of 150 job losses as Unilever tries to amalgamate production of one brand with another. City analysts suggested that none but the brand leaders can really be safe. 'Some of the brands will undoubtedly be sold off, but the majority on the hit list will merely disappear'.[3]

Well-known brands likely to disappear include, Choicest Blend tea, Blue Band margarine and Denim deodorant. In July 1994, Lever Brothers announced that it was to withdraw Wisk, the brand that pioneered the United Kingdom liquid detergent market in the late 1980s.[4] Lever had spent about £20m promoting Wisk on television, but the brand has been declining due to Lever's Persil liquid and P & G's Ariel Ultra liquid.

This is but one example of the many instances where brands that are culled either have similarly positioned sister brands that are performing better, or have been the subject of long-term reductions in investment.

Since the beginning of the 1990's, Unilever, Mars, and P & G, among others, had begun to rationalise their brands. They are seeking to achieve greater marketing effectiveness, with fewer marques, in a quest to move away from diverse multinational portfolios towards harmonised global brands. The issue is not whether to engage in global branding, but how much standardisation is appropriate, where and when.[5]

Evidence of the more global approach is the Marathon bar passing into the Snickers bar, Treets and Bonitos being replaced by M & M's, and the disappearance of brands such as Citrus Hill orange juice, White Cloud lavatory paper and Crosse & Blackwell's canned products.[6] In Eastern Europe, where global brands have emerged overnight, the population is pessimistically anticipating global domination by 'economi-colonial' rule. How long until the member states of the European Union (EU) begin to fear their loss of brand sovereignty?

A possible scenario is a vocal demand for local brands, resulting in reprieves and rejuvenating strategies. The attraction is that brands, with their inherent equity, do not necessarily die once production ceases. It may, however, be too late for some organisations to appreciate that their culling of brands has gone too far. One must therefore question whether it is wise to cull at all.

BRAND CULLING

In this paper, brand culling is defined as the rationalisation of brand portfolios resulting in weaker, or strategically unattractive brands being discontinued in order that a company may focus its resources behind its core cohort of brands. Brands become candidates for culling when their performance falls below acceptable commercial levels, or when strategic reviews result in new policies.

In part, the trend towards brand culling, globalisation, corporate branding and category management are simply attempts to reach critical mass and selective excellence. Yet they may also be seen as a response to the pressure being applied by retailers who list only the leading brands as part of their 'aggressive good housekeeping'.[7] As a result, manufacturers seem to have become conditioned to believe that size is of prime importance, rather than growth opportunities. Ironically, even Unilever recognises that national brands will probably remain the largest sector in many markets.[8]

The pruning of products within a portfolio is not a new concept and the reasons for doing so are numerous and are well explored by some authors.[9,10] Suffice to say that much of the literature on product elimination either explicitly or implicitly assumes that product elimination is a strategy for declining products, ie for those products that have been moved through the various stages of the conventional life cycle and have reached their decline stage.

Avlonitis[11] has argued that:

'much of the literature assumes that the basic problem situation that evokes the elimination of a product is its weak performance, measured usually in terms of sales and profits, whereas recent studies have shown that not all "poor old heavyweights" are ready for elimination. Nor are elimination candidates only those that have been around for a long time and show signs of low profitability and declining sales. The various problem situations which result in the elimination decision are not always easy to detect, and, in a number of cases, a company depends on outside forces to form the "lead" in its elimination decision.'

The outside forces currently driving brand culling include the EU (in terms of pan–European integration in search for economies of scale), global competition and the convergence of consumers' needs and preferences, as well as retailer de-listings.

However, the existing knowledge and theory about product elimination is inadequate to provide an understanding of branding in the context of brand, rather than product elimination. As others have shown,[12] products and brands are not synonymous. For instance, Doyle[13] argues that the product life-cycle applies to products, not brands. There are no reasons as to why a brand cannot capitalise on its personality and adapt to new technologies, thus moving from mature into new growth markets. Successful brand extensions are the supporting evidence. For instance, the Virgin brand succeeds because its personality and associations are made appropriate for a record label, a home entertainment retailer, an airline, and more recently a vodka and a cola. The brand personality has been fine tuned to meet consumers' emotional needs, while each new product area has something to satisfy consumers' functional, rational needs. The withdrawal of any of the Virgin products from their markets would not mark the end of the Virgin brand per se.

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We would argue that even the withdrawal of all Virgin products from their markets would not suffice to kill the brand. This is largely because branding involves the two types of internal, psychological responses that consumers may have to environmental stimuli and events, affect and cognition. Affect concerns feelings, ie 'I like Mazda cars', while cognition involves thinking, ie belief that Diet Pepsi is not fattening.[14] The two systems are richly interconnected and each one influences and is influenced by the other.

Peter and Olson[15] have demonstrated that only some of this internal activity is conscious while a great deal of activity may occur without much awareness. Affect and cognition result in consumers' subjective interpretations and attitudes. When they encounter relevant information, consumers interpret it in terms of their own interests, values, and knowledge. 'These meanings may be organised and stored in long-term memory as knowledge structures. Then, when needed at a later time, parts of this knowledge may be activated (retrieved from memory) for use in other interpretative processes.'[16] Once a brand is known to the consumers, it cannot be easily erased from consumers' minds.

A brand exists first and foremost in the mind of the consumer. It may live for as long as it is remembered. As such, it could be immortal, for example Players cigarettes, Dan Air, International Grocery Stores, Biba, Chelsea Girl, Led Zeppelin and soon William Low (recently acquired by Tesco Stores). Life for a brand (rather than its products) starts once it has established a favourable attitude and a clear positioning in the minds of consumers. It is not solely reliant on consumers being aware of it as a name, but rather aware of it because of the way that the name evokes added-value connotations. House brand names,[17] such as those above retailers' doors, are often culled due to acquisition - a strategy as yet unseen for product brands, which are not made tangible with the help of bricks, and are often acquired for their brand names alone.

The logic of brand revival or recyclability is that some old brands are buried in consumers' psyches and as such may still have value. These 'dormant' brands are more likely to gain readier acceptance by consumers than would a totally new brand, and at a much lower launch cost. A case in point is that of Spangles, the Mars-owned confectionery brand, which has recently been resurrected after a ten-year absence from the market. Ironically, its revival owes more to a retailer, Woolworth's, than to its manufacturer.[18] The retailer persuaded Mars to enter into an exclusive contract for production of four million packs following research which indicated a high 'nostalgia value' for the brand. This is just one example, but it is not inconceivable that retailers may, one day, be asking manufacturers to bring back more culled brands. They may even insist that these brands are bonded to the retailer's house brand in order to secure exclusivity. There currently exists many brands that are exclusively distributed through specific retailers, for example, John Frieda hair products solely in Boots (in the UK). These brands may not as yet be brand-bonded to the retailers' house brands other than in advertising, however, with the growing power of the retailers, brand-bonding — at even the most subtle degree[19] — could well be the next step. An example of this would be the addition of a one-liner such as, 'specially formulated for Boots', in the same way as Tesco currently brands its Salon Professional hair care line.

Should global brand marketers wish to build stronger bridges with their retailers, an option that needs considering is whether their to-be-culled brands should be offered to retailers as surrogate 'own label' brands, under the retailer's house brand umbrella. This not only helps serve to develop product-market categories jointly with retailers, but also increases the value of the product brand's equities, while possibly providing the retailer with significant advertising cost-saving, relative to the cost of promoting a new sub-brand name.

For instance, given such a choice, Sainsbury's may have preferred to licence the OMO or Wisk name from Unilever for its new washing powder, rather than having to start with the new name of Novon, which had no heritage. The benefits to Unilever would include that of maintaining the UK presence of a global brand. Boots, for example, licences the name Salon System from a manufacturer for their own-label hair care range, thereby either capitalising on an established heritage or brand-bonding in order to further develop its heritage.

It may be assumed that retailers would only be interested in such brand alliances if the product brand were unique, or memorable enough to be worth stocking exclusively. For brands with insufficient advertising funds, such retailer support could be the last option for survival and revival. To link with a national retailer, however, is no guarantee that the product brand will remain as a country-specific brand. Many retailers, such as Tesco and Wal-Mart, have already expanded beyond their traditional national borders and, as such, may even provide a secondary means to creating a global brand.

Alternatively, manufacturers could consider proactively entering into joint ventures or licensing agreements with entrepreneurs, while retaining an option to buy back full control of the brands, if and when they have been successfully revived. In such a matter, both local and global opportunities may be exploited simultaneously. There are likely to be interested entrepreneurs with sufficient energy, resources and ideas who would be attracted to the idea of reviving a brand with a turnover too small for the global corporation, but significant enough to sustain a small business and enhance its portfolio. For example, in the USA, when the lavatory paper brand, White Cloud was culled by P & G, the question was raised 'would Chief White Cloud, of an owning Red Indian family, have discarded its proud and only possession?'[20] More likely, the Clouds would have fought ferociously for their inheritance, as would any small company for a brand that to them is significant. Mars, in 1984, discontinued Spangles because, after 36 years, it had become 'too small in comparison with other brands'.[21] To Mars it was small. To another entrepreneurial firm, however, it could be an attractive commercial proposition.

WHY CULL?

Mitchell,[22] suggests that there are two main reasons as to why the 'great brand cull' is starting at a time when the UK has enjoyed two years of real economic growth. Firstly, as a consequence of media inflation, organisations are cautiously evaluating the number of brands that they can realistically manage in their portfolios. Secondly, corporations are reassessing their 1980's policy of brand extensions, — since retailers are making it clear that they do not want to clutter their shelves with 'me-toos'. The rationale for questioning excessive brand extensions is indeed understandable, however, the decisions to cull the core national brands, which used to have much more notable differential advantages, needs careful consideration. For instance, one questions whether it makes financial sense to cull a brand simply because it no longer fits the company's brand portfolio or strategic direction, and thereby no longer justifies promotional support or management time.

A more considered financial analysis may show that to divest, or sub-licence, the brand could be more cost effective, rather than to cull it. Orange Carbonates brand, Tango is a case in point. After more than six years of no support, the brand was sold to Britvic which repositioned the brand as one with British 'street cred', with significantly higher levels of sales.[23] The Lucozade relaunch success story[24] also provides evidence of how a brand with an outmoded positioning ('helps you recuperate') can be turned around by good creative repositioning ('gives your healthy lifestyle more energy').

As was earlier discussed, the consumer's memory cannot easily be erased. Just because Snickers has replaced Marathon is not to say that nothing further can be done with the Marathon brand name. Marathon is still alive in the consumer's mind and could be considered as existing in a 'spiritual state'. Remaining alive in consumers' memories presents an opportunity for it to be resurrected by someone with a new vision.

THE COMATOSE BRAND

Visionaries can breath fresh life into 'comatose' brands. These brands may have a high awareness, and evoke clear benefits, but they suffer from low sales. Examples of comatose brands include Wisk (in the UK), Cyclax (skin care), Beetle (VW car) and Dimension (a first generation 2 in 1 shampoo). They have lapsed into a comatose state due to a lack of investment or a reluctance on behalf of the organisation to reposition them, as was the case with Bovril prior to its successful relaunch in 1991.[25] Fortunately for Cyclax, International Classic Brands, an entrepreneurial group that is prepared to invest the creative energy and resources needed to revive the brand, has recently acquired it. The Beetle is now to be brought back for the same nostalgic reasons as the return to production of the Mini, except that the Beetle will be noticeably updated.

High awareness of comatose brands, as well as favourable associations, make these prime candidates for retailers to recycle under their strong house brand umbrellas. As was earlier discussed, the possibility of a strategic brand-bonding alliance[26] under a retailer's house brand name may provide corporations with an interesting opportunity to build a closer relationship with the trade, while also preventing the brand from lapsing into a coma or losing it altogether. Furthermore this may be a preferable alternative to the challenge of an own-label competitive brand, which does not generate incremental revenue for the manufacturer.

Indeed the essence of Trade Marketing is to expand the retailer's turnover and profitability with manufacturers' brands. There are no rules to suggest that these brands cannot be made exclusive to a specific retailer, or to suggest that retailer own-label brands must be wholly branded by the retailer. Strategic brand alliances of all kinds are being more seriously considered nowadays by all companies from Nestlé in the consumer goods sector to Visa in the financial services sector. For example, Visa have co-branded credit cards with manufacturers such as General Motors, not simply to defend the Visa brand, but more proactively to enable both corporations to extend their franchises. Nestlé has bonded its house brand strategically to General Foods cereal brands for the same strategic reasons.[27]

The issue is not about whether these comatose brands should be bonded to retailer or manufacturer house brands for their revival. Rather, it is about whether these brands should be culled for the benefit of the few brands that are considered to have greater global potential.

Many comatose brands singled out for culling may never have global potential, but could well have further local potential. As global capitalism grows, many local firms will continue to close. Factory production is being centralised by the multinationals seeking greater economies of scale through global expansion. This could result in the pessimistic scenario of efficiency-driven corporations having half as many people remaining in employment, being paid twice as much to produce three times more. The big challenge this creates for governments in the developed world, is creating employment for those who were made redundant in the process.[28] One possible way forward lies in the encouragement of smaller businesses.

THE CONSUMER BACKLASH

As a result of growing unemployment there could be a move towards protectionism. Evidence of this has surfaced during recent GATT negotiations, where the French tried to obstruct the expansion plans of Hollywood films - another global product.[29]

It is only to be hoped that this short-term response to the GATT negotiations will be overcome as the politicians' and economists' predictions of more open markets and more employment come through.

This protectionism could be of an informal, grassroots nature, as occurred in the USA. In a quest to identify and support brands made by the community for the community, the black consciousness movement introduced the 'Proud Lady' symbol for products produced by black-owned companies. With the resurgence of tribalism (witness the break-up of the USSR, Yugoslavia, Rwanda, and movements towards a united Ireland and an independent Quebec, among others) alongside the growth of local unemployment due to the effects of globalisation, it is not hard to imagine national retailer brands emerging as one of the last of the local brands left to support.

A backlash against the global mega-brands could boost the power of local brands beyond a scale ever imagined. Not even Coca-Cola is immune. In addition to Sainsbury's Classic Cola brand taking 16.3 per cent of the total grocery cola market in Britain within nine months of launch,[30] it is under pressure from Virgin cola in Britain and Wal-Mart's cola in the USA. For the time being, Coca-Cola's market share losses have largely been due to lower prices offered by competitors. However, Coca-Cola is clearly known as an American brand. How much worse will it be for Coca-Cola in Britain if consumers decide to support British brands? Other old established brands, such as Nivea, which have never traded on a national origin may be fortunate enough to survive such a scenario. They may escape unscathed

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