

The Return of the Product

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According to a major worldwide qualitative study, "Return of the Product"™, by Research International, the focus of branding is shifting from image to experience in many markets. People are increasingly demanding that an intense product experience be at the heart of the brand.

Research International interviewed over 1,200 people in 43 countries for the study, selecting individuals who acknowledged a "high intensity connection"™ with at least one brand to find out what consumers really want from brands. The information was gathered primarily in mini-groups, but also from in-depth interviews. Across the 1,200 respondents we collected descriptions of over 3,000 "high intensity"™ brand relationships. The analysis of this relationship database yields some interesting insights.

The research was a follow-up to the 2003 "Global Brands"™ study which explored perceptions of modern brands and the issues facing globalisation. Global Brands showed that - in contrast to the arguments in Naomi Klein's "No Logo"™ - today's global consumers want to protect their favourite brands and are mostly able to forget and put aside negative issues such as bad corporate behaviour. There is a strong feeling against homogenous global branding, but consumers want to create their own personal, idealised images of the brands.

Return of the Product shows that even where respondents expressed a sense of brand fatigue, the idea of a world without brands is viewed with unease. A French participant, for example, says, "If there are no more brands, I lose my identity." This feeling is echoed by someone from Russia, "Life would be boring without brands. Everyone would be the same" and by a consumer in Singapore, "I would be like everyone else if there were no brands in the world."

In Return of the Product, the most frequently mentioned brands were those which have global distribution and which are positioned around strong universal psychological propositions, like Nike's incitement to action. In our 2003 study we called these brands "Master Brands"™, and it is no surprise to see them heading the list of "high intensity"™ brand connections. The top brands on this list were, in order of mention: Nokia, Sony, Nike, Coca Cola, Adidas, Levi and Samsung. Interestingly, the study shows that a brand doesn't have to be luxury or niche to create an intense relationship with a consumer. Many of the relationships described were with mass-market local brands in categories with a relatively low purchase price such as food, personal care, household cleaning and consumer durables.

According to the research, customer-brand relationships take four basic forms. Each fulfils a different need. The first three "brand as security, social affiliation or as a means of expression and identity" are based on rational motives or social behaviour. A customer in

Singapore, for example, says, "Oxford tailored shirts make me feel really special; that I belong to a group of people with discerning taste." Or a respondent in Japan says, "People around you and your friends can be categorized by the brands they own".

There is a fourth type of consumer-brand relationship in which the brand fulfils the consumer's need for an intense experience. In this case the brand-consumer relationship is based on an intensified experience at the moment or moments of use, amplified by brand communications and by the personal meaning a consumer brings to the brand. A participant in the survey from Sweden explains the relationship with ECCO shoes, "I don't really care if anybody else has ECCO. I am thinking of myself only - this is really comfort and care for me and my feet." A Canadian consumer speaks about Starbucks in these terms, saying, "I love my Starbucks. They are not just selling me coffee, they are giving me a whole experience." Shopping at Ikea is also described in terms of the experience by a Swede: "Shopping at Ikea is being part of a big family of Ikeans. There is a deeper thought behind Ikea. It is not only furniture, it is belonging and caring."

A respondent in Chile describes a relationship with Patagonia as an experience, saying, "I think the most important thing is that Patagonia promotes a healthy life; an outdoor life in which one can live in harmony with nature. I feel that Patagonia looks after me, gives me a great experience." In Asia Pacific, excluding Australia, the affiliation and expression relationships are most important. And a Dutch consumer talks about a powerful connection with Gillette, "It's a brand to be proud of! I cannot do without Gillette. It's part of my life or even better: it is my life. I am Gillette."

Respondents described the high-intensity connections they feel with their favoured brands. A key characteristic is a sense of transformation. These brands enrich the ownership and consumption experience. Illustrations of the transformative power of the brand experience cover a broad range of goods and shopping experiences. "When listening to music with Sony products I forget about everything outside - it's only the music and me," says a participant in the survey from Austria. "When I've had a bad day I go to FNAC. When I leave I'm in a good mood again," says a French consumer. The ice cream brand, Ben and Jerry's, is described in a similar way by an American: "Ben and Jerry's - it makes the bad go away with just one bite." And a Hungarian speaks about what Old Spice provides him, "If you want to lead a successful and balanced life, it is essential to make peace with yourself first. It is Old Spice that gives me this balance. It helps me get my act together in the morning." Creating high intensity private relationships will be a key strategy for the survival of many mainstream brands.

The trend in branding and communication to establish an intense customer-brand relationship is about making the product the hero. The study identifies four key means by which brand owners can create an intense brand experience: differentiation, consistency, caring and storytelling. A comment by a Japanese consumer sums up the importance of consistency across each experience with the brand, "Until recently I perceived Louis Vuitton positively. However, a single word uttered by their shop clerk made me hate the brand to the extent that the logo gives me goose bumps." With the line between service and product

increasingly blurring, these dimensions are important for both.

Return of the Product shows how consumer-brand relationships differ according to age and life stage. People in each stage – teens (15 – 18), pre-family adults, post family adults and seniors (50 – 55+) form high intensity bonds within different categories. For teens brands are most important as a means of expression. They form close, but unstable relationships with brands, often in fashion, sports, mobile phone, internet, soft drinks and fast food categories. A reputation for innovation is most important to the young. This is as true for a consumer in Chile, –Look at Philips, they are selling exactly the same as the last 30 years–and with low quality,– as for someone in Norway, –I could never use Levi–s again. They stagnated in the 80s.– For pre-family adults the consumer-brand relationship is chiefly about affiliation and expression. Family adults form relationships with brands in each of the four modes. The categories Family Adults tend to form high-intensity connections with include food, alcohol, automotive, financial, consumer electronic, retail and household care. Seniors tend to form relationships with brands that offer security and expression, most often in categories like household and personal care, retail, travel, food, alcohol and cosmetics.

The Return of the Product study will be launched globally in April 2005 with events in Shanghai, London and Paris.