The analysis of corporate brand marks and their communication strategies

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The candidate confirms that the work submitted is his own, except where work which has formed part of jointly authored publications has been included. The contribution of the candidate and the other authors to this work has been explicitly indicated below. The candidate confirms that appropriate credit has been given within the thesis where reference has been made to the work of others.

Chapters 3 and 4 were used to form the following conference paper:
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The literature review section of the above paper was extracted from chapter 3, while chapter 4 provided the basis of the methodological discussion. The second author's contribution to the conference paper was in the capacity of acting as a second coder, and by providing suggestions for refining the coding framework.

Acknowledgements

Abstract

Corporate brand identity has undergone a remarkable transition from a strictly design-orientated activity into a very complex, multidisciplined activity. As the scope of corporate brand identity expanded, academic interest followed. As each of the parent disciplines contributed to the greater understanding of the domain, attention increasingly became focused on the management of its disparate activities, with the exception of design – the origin of the domain. Consequently, very little is known about the design component of corporate brand identity, and, in particular, the construction of the primary visual manifestation – the corporate brand mark. Yet this prominent component, on occasions, has been subjected to considerable criticism. This thesis, therefore, set out to examine the expressions of corporate brand marks, with the intention of developing a theory of how such devices are constructed.

Archival data were collected from 100 cases spanning a 50-year period of activity and subjected to a content analysis. The emergent theoretical issues were subsequently explored through data generated from eight expert witness interviews. The findings from this mixed methods research indicate that corporate brand identity has migrated from being a mechanism for expressing internal personality to being an instrument for expressing external relevance. It emerged that audience awareness and audience appeal were the two determinants that influenced the selection of the five possible brand mark expressions (arbitrary, antecedents, activity, attitude, and aspiration). This thesis, therefore, provides a firm theoretical contribution to the existing body of knowledge, and has substantial implications for education, practice and scholarship.

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1   Introduction

1.1 Background to the research

Branding has been a hot topic for some time – and for good reason. In a climate of intense competitive forces and an environment of easy imitation, strong brands are seen as key assets for establishing and maintaining profitability (Balmer, 1995; Andreasen and Kotler, 2003; Olins, 2003). According to De Chernatony and McDonald (1998) it is the combination of the goodwill of brand identity along with organisational knowledge, rather than inventory, that drives mergers and acquisitions activity. The commercial value of owning successful brands, therefore, is incontestable (de Chernatony and McDonald, 1998; Blackett, 2003). Organisations have become aware that an effective corporate brand identity can facilitate market relevancy, attract investors, motivate employees, and provide a means of contextual distinction (Melewar and Karaosmanoglu, 2005).

In recognition of the growing importance of corporate brand identity, the domain has received increasing attention. Academic debates have been preoccupied with misalignment management and the pursuit of attaining consistency throughout a brand's touchpoints (Balmer and Soenen, 1999; Balmer and Greyser, 2002; Hatch and Schultz, 2001, 2003; Balmer, 2012). The limitation of earlier studies is that they were inclined to explore aspects of corporate branding other than the visual manifestations. Empirical research conducted directly in relation to the visual manifestations of corporate brands has predominantly addressed either the broader visual manifestations – devices other than the primary device of the brand unit – or on the exploration of visual devices within niche geographical markets (Melewar and Saunders, 1998, 1999; Melewar, Saunders and Balmer, 2000; Melewar, et, al, 2006).

Corporate brand marks are considered to be economical devices for visual articulating organisational strategy (Olins, 1989, 1995, 2003, 2008; Van Riel and Balmer, 1997; Ind, 1997). However, the limitation of prior research within this domain is that very little is known about the construction of these primary visual manifestations. According to the literature, brand marks can convey a number of different messages: i) organisational personality, ii) differentiation, iii) organisational operation(s), iv) organisational vision, v) organisational mission, vi) organisational values, or vii) an abstract notion of 'a big idea' (Olins, 1978a,b, 1989, 1995, 2003, 2008; Bernstein, 1984; Ind, 1997 Balmer and Soenen, 1999; Urde, 1999, 2003; Balmer and Gray, 2003; Jones, 2000, 2001; Wheeler, 2009). A more contained, but abstract conceptualisation was provided by Olins (1995: 3), in which he stated that 'an identity can project four things': Who the organisation is; What the organisation does; How the organisation operates; Where the organisation wants to be. Yet despite these multiple, potential brand mark expressions there is no theoretical framework that explains the selection process of these different expressions.

1·2   Research issues and the formulation of the research questions

This enquiry is concerned with gaining a theoretical understanding of the communicative intentions of corporate brand marks. More specifically, the author's interest is in the sender-orientated facet of brand mark communication rather than recipient interpretations of brand marks. Whilst the interpretative facet of brand mark design is of considerable importance in the broader field of brand communications, such stakeholder perceptions are not the focus of this research. The principal concern here is in the conceptualisation and construction of organisational expressions within the restricted scope of a brand mark.

Unlike lengthy mission manifestos or vision statements, corporate brand marks (defined in section 1·6) are economical devices that operate more concisely than the aforementioned textual devices (Hyland and Bateman, 2011; Olins, 1995, 2008; Van Riel, 1995). Whilst the prevailing view is that corporate brand identity is a reflection of corporate strategy (Olins, 1989, 1995; Ind, 1997; Balmer and Soenen, 1999; Van Riel, 1995) it is less apparent which aspect of corporate strategy becomes the prioritised expression. Not all

brand marks express the same element of corporate strategy, i.e., there are brand marks that prioritise expressing the industry of operation, while others focus on the expression of core values or corporate vision. The central issue lies understanding the determinants that inform the selection of prioritised expressions. As alluded to earlier within this section, little attention has been assigned to the theoretical exploration of brand mark expressions, and how such expressions are translated into visual form. The aim of this thesis, therefore, was to generate a theoretical explanation of corporate brand mark expressions.

In addition to understanding *what* corporate brand marks express there was the related issue of understanding why a given expression had been prioritised. The logic of the enquiry, therefore, is as follows: first, identify what expressions have been expressed, and second, obtain explanations, from the actors [designers] directly involved in the creation of the marks, regarding the prioritisation of these expressions. This research issue was articulated through a descriptive question, which provided a useful starting point, and subsequently by an explanatory question (Blaikie, 2007; Creswell, 2008; King and Horrocks, 2010; Maxwell, 2004; White, 2008). Accordingly the research questions are as follows:

RQ1: What have corporate brand marks visually expressed over time?
RQ2: What explains the selection of these visual expressions and what were the influences?

By framing the research in this way it enabled any significant changes over time to become apparent, and potentially highlight the contextual factors that influence the choice of brand expression prioritised in a brand mark. It is considered that the identification of the determinants of brand mark expression would enable the development of a theoretical framework. (Research issues and question formation are discussed in section 4·3.)

1·3   Justification for the research

Whilst academic interest in corporate branding has increased, and our understanding of corporate branding has improved, relatively little is known regarding the theoretical construction of corporate brand marks. Without empirical research specifically relating to

the examination of the expressions within these devices, this aspect of corporate branding remains theoretically misconceived. This component warrants the same importance as other brand manifestations. Furthermore, the author argues, a total comprehension of corporate brand management cannot be attained with only a limited understanding of theoretical construction of corporate brand marks.

Without a theoretical understanding of the visual manifestations of corporate brands, organisations continue to risk potential ridicule, negative publicity, and damaged credibility. The rebranding of British Airways in 1997 involved a new visual manifestation for the tailfins of the organisation's fleet of aircrafts (BBC News, 2001). The rationale given to support the changes was credible: British Airways was a brand that catered for a global audience, not solely for British people (Smith and Skapinker, 1997; Marston, 2001). As such it felt that its visual identity should reflect its multicultural audience by incorporating 'ethnic' designs on its livery (BBC News, 2001). This bold approach created significant debate, the most notable act of disdain being the then Prime Minister of the UK, Margaret Thatcher, who upon the public launch of the new design, covered the tailfin of a model aircraft with a handkerchief (BBC News, 2001). Such negative reactions can result from the change of a corporate brand's visual manifestation, which can impact on an organisation's credibility in the eyes of its stakeholders (Harrison, 2000; Rich, 2002).

There have been many instances where the visual manifestations of a corporate brand identities have been the subject of ridicule and scorn, another example being the Post Office's rebranding to become Consignia, which, after significant adverse reaction from customers, was abandoned (Guardian, 2002; Verdin, 2002). It is apparent that the lack of research regarding such an important component of corporate brands exposes an obvious theoretical gap in the literature, where there is very little known about the determinants that inform the decision making process of corporate brand mark expression. Empirical research is necessary, therefore, to gain a much deeper, theoretical understanding of the strategies of brand mark expression.

1·4   Methods of empirical enquiry

In accordance with the intentions set forth in section 1·2, the aim of this study was to develop a theoretical understanding of the strategies of brand mark expression. To address the aforementioned research issue a successive mixed methods design was conducted. (1) The first method consisted of the content analysis of archival data (relating to a sample of cases). A visual analysis was also conducted as a means of triangulating the data from the content analysis. A conceptual framework, derived from the four pivots framework suggested by Olins (1995), was used as a mechanism for capturing brand mark expressions, and facilitating the construction of a typology of corporate brand expressions. The use of descriptive statistics provided an overview of the activity and enabled a pattern of expressions to become apparent. This gave direction to the second stage of the study.

(2) The second stage of the research sought to explore a subset of these cases with the intention of gaining deeper explanations for the emergence of a number of theoretical issues to arise from stage one. The conceptual framework accommodated the majority of the cases from the sample, with the exception of five from a total of 100 cases. These outliers then formed part of the further enquiry, alongside a number of other cases where explanation and further clarification were sought. Interview data was gathered from the direct informants responsible for the construction of the graphic devices from this subset of cases. The focus of these interviews was to gain a greater contextual understanding surrounding individual cases and to hear first-hand the expert witnesses recall the decision-making process involved in the construction of the brand marks. Further explication of the research methods is provided in chapter four.

1·5   Delimitations of scope and key assumptions

In order to circumscribe the scope of the study it was essential to impose a number of restrictions on the sampling criteria adopted in this thesis. First, the enquiry was concerned with developing a theoretical explanation of corporate brand expression rather than product brand expression principally because of the greater complexity involved

in organisational definition. This delimitation extended to the sampling criteria used in the study: only cases that featured large organisations were deemed eligible, due to the increased complexity involved in defining large diversified organisations. Indeed it is the intrinsic challenge of devising relevant expressions for large organisations that was the key concern in this thesis. By contrast, products typically have a more specific purpose and thus present less of a definitional challenge.

Large diversified organisations, for the most part, sought identity counsel from acknowledged specialists within the field, which relates to the subsequent criterion. The second restriction imposed on the sampling criteria was the decision to limit the eligibility to those cases that were designed by professional design consultants, consisting originally of individual design practitioners and succeeded over time by specialist consultancies. The assumption here was that by restricting the eligibility of cases to only those produced by highly regarded professionals of corporate brand identity, the sampling would only include cases that contained credible design intervention.

The third restriction related to the unit of analysis, where the focus of the brand expression was on the organisational brand mark. This is regarded as the primary unit within a visual manifestation of a brand identity. Brand marks are considered as the primary visual identifiers of corporate brands, due to their visual independence. Furthermore the broader visual manifestations, such as colour, can be considered as an extension of the primary device because of they operate as dependent, indexical linkages to the primary identifier – the brand mark.

1·6   Definition of the key constructs

In relation to the prime identifier – the logotype and/or symbol – there is a lack of consensus on the terminology relating to the specific types of marks in a corporate brand identity (Olins, 2008; Hyland & Bateman, 2011: 7). Olins (2008: 31) has acknowledged that 'exact definitions are elusive'. The domain is occupied with terms such as *logos, symbols* and *straplines*, where – even within the writings of experts – it has been noted that

these terms are used interchangeably (Olins, 2008: 30; Hyland & Bateman, 2011: 7). For clarification, therefore, it is a worthwhile point at which to revisit the usage of such terms in the literature and clarify some of the constructs relating to the various types of marks.

Term	Definition	Source
'Logotype'	'Exact definitions are elusive, but you won't go wrong if you regard a logotype as a word designed in particular way …'	Olins, 2008: 31
'Wordmarks'	'A freestanding acronym, company name or product name that has been designed to convey a brand attitude or positioning.'	Wheeler, 2009:51
'Logotype'	'Logotype stems from the Greek logos, meaning word, and relates to any typographic styling of a name or word that makes it easily recognizable or significant as a mark of ownership or identity.'	Hyland & Bateman, 2011: 7
'Logotype'	'Logotypes – wordmarks, monograms and single-letter marks – are where the verbal becomes visual …'	Evamy, 2012: 6
'Letterforms'	'A unique design using one or more letterforms that act as a mnemonic device for a company name.'	Wheeler, 2009:51
'Symbol'	'Exact definitions are elusive, but you won't go wrong if you regard … a symbol as a strictly visual device.'	Olins, 2008: 31
'Symbol'	'What is meant by the word "symbol" here needs some defining. This presents problems, because the definition has changed over the last century and continues to do so. One reason for this is the lax and relatively recent interchangeability of the terms "symbol" and "logo".'	Hyland & Bateman, 2011: 7
'Symbol'	'A symbol that conveys a big idea, and often embodies strategic ambiguity.'	Wheeler, 2009:51

Table 1·1. Title: Definitions relating to the primary visual unit.

There is general agreement in the literature that the term *logotype* refers to a type of brand mark that is formed from a name or word, set in a distinctive style, that fundamentally consists of an arrangement of letters (Olins, 2008; Wheeler, 2009:51; Hyland & Bateman, 2011: 7; Evamy, 2012: 6). However, Wheeler (2009) and Evamy (2012) have also referred

to a logotype as a wordmark, which seems a more self-explanatory term and enables the discrimination from the generic term logo. To confuse matters further Wheeler (2009: 51) also introduced the term letterform, which consisted of an almost identical definition as the definition for a wordmark, the only difference being that a letterform has the quality, supposedly, of operating as a 'mnemonic' device. Such an assortment of terms and definitions obscures clarity. One exception, however, is the term monogram, which has a distinctive difference from the term logotype. A monogram is fundamentally a type of logotype but has a greater specificity relating to its design composed of a set of initials, as opposed to a name or a complete word (Chambers, 1999).

Figure 1·1. Title: Brand marks comprised of one graphical element: a logotype.

The term *symbol* has also been subjected to misuse over time. After stating that 'exact definitions are elusive,' Olins (2008: 31) proceeds to claim that 'you won't go wrong if you regard … a symbol as a strictly visual device'. Here, Olins is seemingly referring to a symbol being a pictorial element and therefore of notable difference from a logotype, which is constructed from letters. Meanwhile Wheeler (2009: 51) places greater emphasis on a symbol's mode of communication: 'A symbol that conveys a big idea, and often embodies strategic ambiguity.' This latter point clearly makes reference to the role of a pictorial

device symbolising an idea. Since definitions of such terms are somewhat lacking in practitioner literatures, the author draws on the Chambers dictionary definition of a symbol as a point of departure: 'A thing that represents or stands for another, usually something … representing an idea or emotion' (Chambers, 1999: 1433). (The *object* in this sense, termed the 'thing', would, in the context of this study, be a pictorial mark and not a letterform-orientated monogram or logotype.)

Figure 1·2. Title: Brand marks comprised of one graphical element: a symbol (BP, GE, and ICI contain monograms).

The intention here is to avoid perpetuating the ambiguous use of terminology relating to visual identity. Notwithstanding, these terms are not mutually exclusive and can exhibit tendencies to overlap. For example, in Figure 1·2 it can be seen that General Electric's symbol operates as a pictorial device and therefore is primarily a symbol; however it also contains a monogram, as it contains the initials GE. Similarly, Pfizer's logotype is set within an oval shape, which subsequently translates the logotype to an abstract, pictorial form, thus simultaneously being both a logotype and symbol. As a means of dealing with such occurring combinations of devices, a generic term is often preferable when referring to the *totality* of the visual unit; accordingly elements within the unit, based on the postulation of a visual identity having multiple graphic devices, can be referred to by the proper term (logotype, monogram and/or symbol).

Figure 1·3. Title: Brand marks comprised of two elements: a symbol and a logotype.

As a further attempt to reduce ambiguity, the term 'logo' – as a generic reference to a visual identity – has been avoided throughout this study, as has already been acknowledged. As 'logo' is a contraction of the term logotype, this reduced form technically refers to a specific type of primary device composed from letters. Therefore, to reduce imprecision, the term *brand mark* was chosen as the designation for referring to generic primary manifestations. Accordingly this indiscriminate term relates to any combination of logotype, monogram and/or symbol as a total, unified unit. This choice of term, which is a compound of 'brand' and 'trademark', is a more suitable term, the author argues, for a generic referent. In comparison to Wheeler's (2009:50) generic term, which designates the primary visual manifestation as 'the signature', the former term has connotations of 'brand' and 'trademark' whereas the latter has connotations of a cursive set of letterforms, much like a personal signature. As a consequence the generic term 'brand mark' places emphasis on the *purpose* of the primary manifestation (a graphic representation of a brand) but without alluding to any specific type of graphic device.

1·7   Outline of the thesis

With reference to Figure 1, this thesis is composed of five phases. The first phase consists of chapter one, where a brief overview of the research project is presented. The aim of this first chapter was to provide a sufficiently concise background of the research topic and to situate the research problem within context, which led on to the justification of the study. After outlining the methodology this section discussed the scope of the study along with its delimitations and key assumptions.
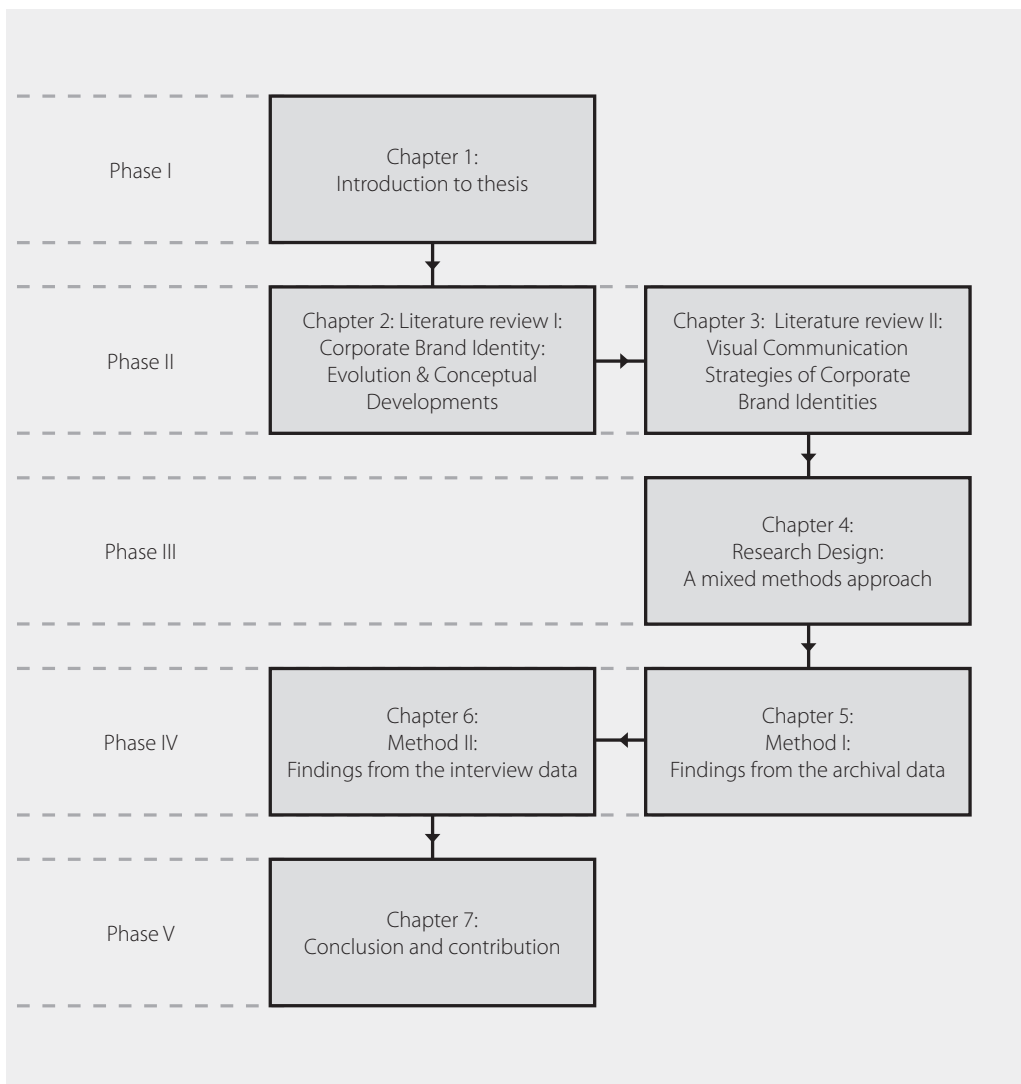
Figure 1·4. Title: An outline of the thesis.

Chapter two makes the transition to the second phase of the study, where the intention was to present an evaluation of the research problem through the review of the background theories located within the area of corporate brand identity. The central concern of this chapter was to review the scope of the literature in relation to the origin, evolution and the significant conceptual developments of the field. This chapter, therefore, outlines the historical development of the discipline formerly known as 'corporate identity', and charts the transition from corporate identity to corporate branding. The chapter subsequently progresses to the examination of the debates within the literature regarding the distinctions between product brands and organisational brands. A discussion on brand architecture ensues and leads on to the related subject of brand management, where the key models of brand alignment are given consideration.

Chapter three builds upon the previous chapter by increasing the emphasis on the critique of the literature relating specifically to the visual manifestations of corporate brands. The existing body of knowledge was examined, and the limitations of the literature, in terms of its capacity to provide theoretical explanations for the construction of corporate brand marks, were highlighted. Here, attention was directed towards the visual manifestations of corporate brand marks, and the differing and imprecise proposals expressed in the literature. The trajectory of this chapter commenced with an exploration of corporate personality and shifted through a number of corporate expressions, from the conveying of organisational activities and organisational attitudes to organisational expressions.

The third phase of the study was concerned with providing a description of the mixed methods approach adopted in this thesis. Chapter four commenced with a discussion on the philosophical assumptions underpinning the study and located the study within the paradigm of social constructionism. The subsequent section provided an exposition on the translation of the research issue into two researchable questions. This was followed by an explanation of the operational issues, such as the method of sampling and the instruments used to capture the data, relating to the two methods of empirical enquiry. The first method consisted of a content analysis of archival data, which resulted in a set of descriptive statistics that revealed an occurrence of patterns. A number of issues emerged from this analysis, which directed the second method of enquiry. The second method involved

the pursuit of the theoretically interesting cases through the generation of interview data, where the aim was to gain deeper explanations for the occurrence of the patterns established from the archival data. It was essential for the validity of the study that the interview data was generated from the direct informants who were involved in the creation of the actual brand marks. This issue of validity was addressed in the final part of chapter three, along with the consideration of the ethical implications of the enquiry.

The fourth phase of the study encompasses the analysis and interpretation of the two methods. Accordingly chapter five presents the interpretations of the analysis of the archival data, where the concern centres on the changes in brand mark expressions over a period of 50 years. This section specifically examines the occurrence of patterns in the data in accordance with the conceptual framework, which was operationalised as an instrument to capture the data. The correspondence and the variance of the data emerged from the frequency distributions, which provided a summary of the brand expressions that occurred over time. Chapter six presented the analysis and interpretation of the interview data, where the findings were arranged in three categories: aspirational expressions, activity expressions, and attitude expressions. Following the discussion of these expressions a theoretical explanation of the influential determinants is presented. The formation of this framework, termed the Eight As of corporate brand expression, is defined and explained in relation to its theoretical contribution.

The fifth phase of the study locates the findings and the theoretical framework in terms of its contribution to the broader body of knowledge. Chapter seven, therefore, synthesizes the conclusions to the research issues with the findings from the literature review, thereby situating the theoretical contribution in the existing body knowledge. This chapter expands on this contribution by discussing the theoretical and practical implications of the work. This – in essence – elucidates on how the theoretical framework could function as a mechanism for formalising the strategic considerations of brand mark expressions. Subsequently this chapter discusses the limitations of the methods of empirical enquiry. In light of the theoretical framework a number of avenues for further investigation emerged, with the primary point of interest being concerned with the expansion of the case criteria and

research parameters in an attempt to extend the theoretical generalisations of the framework. Furthermore it is proposed that potentially the framework could be expanded to accommodate a wider range of brand mark expressions, such as in the domains of geographical branding, event branding or product branding.

1·8   Summary

Chapter one laid the foundations of this thesis. The overall field of corporate brand identity was established and previous research from the contributory disciplines, the principal ones being corporate communications, marketing and graphic design, was summarised. Each of these disciplines, with the exception of graphic design, has addressed aspects of corporate identity management other than the visual manifestation; meanwhile the graphic design literature has neglected the strategic aspect of corporate identity design. The existing gap in knowledge of corporate brand mark expressions provided clear justification for the research. This, therefore, provided the platform to deliver a clear statement of the research question, followed by a brief explanation of the associated research issues.

The philosophical paradigm underpinning this research was clarified in the methodology, accompanied by an outline of the research methods. The research methodology consisted of two stages. Stage one was concerned with constructing a typology of corporate brand mark expressions from a sample of 100 cases that spanned a 50-year period. These findings subsequently provided the direction for stage two, where the theoretically interesting cases were explored through the use of semi-structured interviews with direct informants (the individuals responsible for the conceptualisation and construction of the specific brand marks). Following a structural overview of the thesis, a definition of the key terms was presented.

2 Literature Review I: Corporate brand identity: Origin, evolution and conceptual developments

2·1 Introduction

Until the 1980s corporate identity was a specialism within the field of graphic design (Van Riel, 1995). This activity was characterised by a preoccupation on the visual manifestations of organisations and the pursuit of achieving visual consistency (Olins, 1978, 1989, 1995; Bernstein, 1984; Birkigt and Stadler, 1986; Selame and Selame, 1988; Ind, 1997). However the profession of corporate identity underwent a transition from a design discipline to a multidiscipline activity, which resulted in a profession that had numerous definitions, and lacked consensus on the meaning of the term (Balmer, 2001a). As such, the evolvement of corporate identity – and, of course, the rise of branding – has led to an industry that has undergone significant change. Therefore this chapter will explore the conceptual origins and the theoretical evolution of corporate identity.

Key to this exploration is the examination of the two corporate identity issues that have received the most attention from scholars: corporate brand architecture and corporate brand misalignment management. Brand architecture has received attention because organisations needed to understand how to optimise their portfolio of brands and associated nomenclature in order to maximise their assets (Olins, 1978, 1989, 1995; Ind, 1997; Aaker, 1996, 2004). The preoccupation with misalignment management is driven by the organisational desire to eliminate the delivery of contradictory and potentially undermining brand experiences (Balmer and Soenen, 1999; Balmer and Greyser, 2002; Hatch and Schultz, 2001, 2003). Accordingly academic debate has been characterised by the pursuit of attaining consistency throughout all of a brand's touchpoints.

The review of the corporate identity's origins and theoretical evolution serves two purposes. First the review of this background material provides a context for the subsequent empirical research; secondly it reveals how academic attention has neglected the area of corporate identity activity that initiated the discipline, and is the particular aspect of branding that is subjected to the most criticism (when changed as part of a rebranding programme), and consequently has become the least understood aspect of corporate brand identity activity.

2·2   The historical development of corporate identity

Corporate identity, as a discipline, originally evolved from the practice of graphic design in the 1950s and 1960s, largely in the US (Allen and Simmons, 2003). However, the activity of creating order, discipline and bringing together employees within large organisations was not new. The military had used corporate identity systems as a method of achieving coherence before the nineteenth century industrialisation (Olins, 1989). In the late 1800s, large organisations, such as railway networks adopted similar house-style systems – in terms of coordinating uniforms, livery and other visual elements – as a way of creating a visual consistency (Olins, 1989, 2003). Around the early 1900s a small number of enlightened European companies began commissioning designers to devise visual identity programmes, which involved the visual audit and design of a visually consistent appearance (Selame and Selame, 1988; Allen and Simmons, 2003). Companies such as AEG and Braun, of Germany, and Olivetti of Italy led the way in corporate consistency, inspiring other corporations to follow (Allen and Simmons, 2003; Olins, 2003).

Indeed it was Olivetti that inspired Thomas J. Watson Junior, president and son of IBM's founder, to commission graphic designer, Paul Rand, to try and make IBM 'look like the kind of company it really is' (Heller, 1999: 149). Leading American designers such as Paul Rand (designer of IBM and UPS), Saul Bass (designer of AT&T, United Airlines and Minolta) and Raymond Loewy (designer of Lucky Strike and Shell) were three of the early practitioners responsible for establishing the profession of corporate design (Allen and Simmons, 2003). Walter Margulies, of the US consultancy Lippincott & Margulies, is

cited as the practitioner most responsible for the commercial impetus of the corporate identity profession (Olins, 2003).

By the early 1970s America's influence had reached Britain. The prominent designer Michael Wolff, cofounder of Wolff Olins, created landmark British identities for Bovis and 3i (Allen and Simmons, 2003). From the 1970s numerous corporate identities, designed by the consultancy Wolff Olins, were launched, such as Akzo Nobel, BT and ICI. In Europe, meanwhile, corporate identity became ever more prevalent. In Germany, Otl Aitcher was commissioned to design the identity for Erco and Luftansa Airlines (Staal, 1990). While over in the Netherlands there was a new identity for KLM airlines, designed by British designer F.H.K. Henrion (Wells, 1990). The Royal PTT organisation was another Dutch company that took their corporate identity seriously, commissioning numerous evaluative processes and many modifications of their visual identity system (Hefting, 1990).

By the 1980s, during an era of mergers and acquisitions activity and privatisation of the public sector, there was an environment that fuelled a high-growth period for the corporate identity profession. It was no longer the sole activity of lone designers but a multidisciplinary profession. Prolific corporate identity consultancies such as Lippincott Margulies (US), Landor Associates (US) and Wolff Olins (UK) integrated designers with people from marketing, behavioural sciences and management backgrounds (Olins, 2003). The change from designer-orientated activity to multidisciplinary profession was an inevitable development as each facet of a corporation's identity necessitated management. However this influx of professionals from different backgrounds further contributed to the 'fog' that surrounded the discipline of corporate identity (Balmer, 2001; Olins, 2003). As one author put it: "corporate identity is one of the least understood disciplines. It's the one that's got away" (Moss, 1987, cited in Balmer, 1996, p.24). Confusion was compounded when the word 'branding', which used to refer to the marketing of fast-moving consumer goods, was slowly adopted by the industry over the 1990s. (Section 2·3 discusses this issue further.)

2·3   From corporate identity to corporate branding

Walter Margulies, the cofounder of the US consultancy Lippincott & Margulies, is credited with coining the phrase 'corporate identity' at some point during the 1950s. The term was generally used to describe the activity of creating a consistent appearance across all visual manifestations of an organisation, which, for large, complex organisations was not easily achievable (Olins, 2003). Indeed during the 1980s and 1990s corporate identity theory pushed forward the notion of consistency across the visual manifestations (Selame and Selame, 1988; Olins, 1989; Steidl and Emery, 1997). Over time, however, the scope of corporate identity expanded beyond the visual manifestations to a much more extensive programme of orchestrating and aligning all points of contact between a corporation and its stakeholders (van Riel, 1995). Accordingly the pursuit of consistency extended throughout every aspect of an organisation, defined by Van Riel (1995: 28) as 'the way in which a company presents itself – through symbols, communication and behaviour – to its target audiences'. The alignment of these heterogeneous organisational 'touchpoints', therefore, required the input from a range of professionals, which introduced a multidisciplinary dynamic to the activity of corporate identity.

Regardless of the expanding scope of the discipline the term corporate identity remained heavily associated with the activity of the visual representation of an organisation. One study conducted during the mid 1990s (Schmidt, 1995) found that 44 per cent of British managers considered the activity of corporate identity to be solely related to the visual brand mark of an organisation. As such, the term corporate identity imposed a perceived limitation on the specialist consultancies that sought to offer a more multidisciplinary package of services (Olins, 2003). These consultancies sought to emphasize that the construct of an organisational brand amounted to more than organisational appearance: the experience of engaging with an organisation can reveal a far greater amount of information about the culture and personality of the organisation than, for example, a printed letterhead (Olins, 1978b; Van Riel and Fombrun, 2007). Indeed any interaction between a company and its stakeholders can translate into an intentional or unintentional impression. Consequently corporate identity practitioners considered the term 'corporate branding' to be a more accurate reflection of the growing remit of their activity (Olins, 2003).

From an academic perspective, Knox and Bickerton (2003) suggested that the migra-tion from the use of the term 'corporate identity' to the use of 'corporate branding' was a result of the convergence of the two domains of organisational identity theory and mar-keting theory (see Figure 2·1). Previously these two domains had a different focus: one was organisation-orientated, while the other was product-orientated, both of which have managerial distinctions (discussed in section 2·4). Nevertheless the convergence of these two domains reflected a merger of similarly conceptualised activity, in that the 'brand' nomenclature better related to the notion of a multidimensional, intangible asset of high value and worthy of necessary investment (Olins, 2003). However the term 'brand' was as-sociated with its roots in the marketing of fast-moving consumer products, and therefore there became a need to distinguish between different types of brands (discussed in the subsequent section).
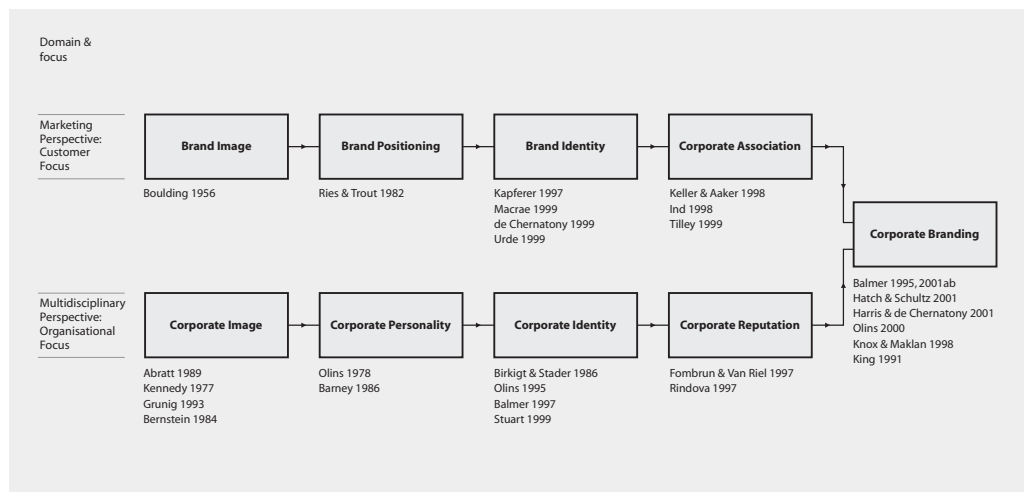
Figure 2·1. Title: Convergence of corporate branding. Source: Knox & Bickerton, 2003.

The tenet of corporate branding – consistency – remained a key issue but became more complex as the scope of the activity increased. Accordingly much attention has been de-voted to the management of corporate branding's vast array of touchpoints by an increas-ingly diversified input of theorists. As such, academic interest focused on the orchestration of the heterogeneous touchpoints, as a means of achieving brand alignment (Balmer and Soenen, 1999; de Chernatony, 1999; Hatch and Schultz, 2001a, 2001b). Whilst such ef-forts have introduced a greater understanding of the discipline, there was a distinct lack of

theoretical understanding regarding the visual manifestation of corporate brands. It seems that, as identity consultants sought to distance their services from that of graphic designers, the theoretical development of the visual manifestations of corporate brands has been neglected by academics in the field.

While the visual manifestations of a corporate brand are only one component of a much larger programme of activities, this component is one of the more prominent and visible aspects of a corporate brand and has, in numerous cases, been subjected to the greatest ridicule by the press and public alike. One of the most prominent cases was that of the re-branding of the Post Office in the UK, which changed its brand nomenclature (and consequently its visual manifestation) to Consignia. The justification given for this change seemed credible and indeed the explanation behind the intended expression was logical; however the change provoked a large public response where the criticisms were directed at the contrived name (Verdin, 2002; Cooper, 2010). However it became apparent that the British public were fond of the former visual identity, and their views had not been sufficiently considered. The consequence of this situation, besides the public ridicule, was that after having been introduced the identity was subsequently abandoned (Guardian, 2002; Verdin, 2002; Cooper, 2010). In this example it can be seen how the visual manifestation of Consignia's brand identity was the most susceptible to criticism, and pointed to the need for a greater understanding of the management of this aspect of brand identity.

2·4   Product branding and corporate branding: the distinctions

The term 'brand' originated from the hot-iron branding of livestock, which was used to signify the ownership and origin of cattle. Over time this concept was used in the marketing of products, which subsequently led to the development of trademark legislation (Blackett, 2003). Improvements in manufacturing competence meant that the functional attributes of products could be easily imitated, and therefore trademarks became increasingly important for the protection of products and other commercial assets. Trademarks, therefore, were used as designations of authenticity, provided assurance of quality, and facilitated the promotion of emotional benefits, which extended a product's appeal beyond

the scope of easily imitated, functional benefits (Brymer, 2003; de Chernatony and McDonald, 1998). Accordingly trademarks – the visible manifestation of brands – provided organisations with a means of differentiating – and legally protecting – their products from competitors' products (de Chernatony and McDonald, 1998).

While trademarks related to products, they did not necessarily relate to services. Consistency and standardisation – a fundamental of branding – was relatively simple to achieve in a product but more difficult to achieve with services, since they depend heavily on people providing the service – and it is very difficult to standardise staff and consumer interactions, particularly across cultures (de Chernatony and McDonald, 1998). Nevertheless as the service sector grew in the UK, with the deregulation and privatisation of financial services, utilities and public service organisations, there was an increase in competitive activity amongst service suppliers. Furthermore, because of the ease of product imitation, a growing number of established manufacturing companies became service-orientated in order to distinguish their offerings by way of providing a better customer experience. Increasingly it was high levels of service – rather than physical goods – that provided the competitive advantage that companies and customers alike sought (de Chernatony and McDonald, 1998).

Service-led companies realised that brands were even more important for differentiating services than for products. However the lack of tangible attributes in service brands meant that it was more difficult to communicate the values of a brand, unlike product brands. In a product, the physical attributes can be bestowed with a brand's values, whereas in a service brand it is the company culture and behaviour of the service providers that are the agents for delivering the brand values. Therefore the product branding model could not be followed in the process of building service brands; the branding model for service brands was more akin to that of corporate identity (de Chernatony and McDonald, 1998).

Products and services, however, are not necessarily mutually exclusive: some brands relate to both products and services. For example, BMW is a mass manufacturer and a provider of financial services. However the focus of a brand is on delivering a consistent customer experience, whether this be through a product interaction, a service experience, or

both. For instance, BMW's brand values are embedded within both the products and the behavioural performances of the staff that deliver the services. Furthermore, the BMW brand values relate to customers and corporate stakeholders. It is this complexity – typically from mature, diversified businesses – that presents a very challenging task of classifying brands, not only as either a product or service brand, but as either a corporate or a consumer brand.

Whilst it can be difficult to distinguish between types of brands, such as product brands and service brands, key differences between the two branding platforms have been noted by the likes of Balmer (2001a,b) and Hatch and Schultz (2001, 2003). These are summarised in Table 2·1. The first key difference noted was that a consumer brand focuses on the product, while a corporate brand has a much broader scope of focusing on the company. The branding effort, in product brands, concentrates on the relationship between the product and the consumer, whereas in a corporate brand the emphasis is on the corporate organisation and its behaviour, and all of its interactions with its stakeholders (Hatch and Schultz, 2001, 2003). These distinctions seem to apply to brands that are distinctly orientated around either one of the two types of branding platforms. The assumption here, however, is that the two types of brands are mutually exclusive, when many brands – Apple for instance – fulfil both of these roles.

	Product brands	Corporate brands
Focus attention on	The product	The company
Managed by★	Middle manager	CEO
Attract attention/gain support of	Customers	Multiple stakeholders
Delivered by	Marketing	Whole company
Communications mix★	Marketing communications	Total corporate Comm.
Time horizon	Short (life of product)	Long (life of company)
Importance to company	Functional	Strategic
★ These differences were offered by Balmer (2001a)		

Table 2·1. Title: How corporate branding differs from product branding. Source: Hatch and Schultz, 2003.

The second noted difference between the two types of brands was tangibility (de Chernatony and McDonald, 1998; Hatch and Schultz, 2001, 2003). A product is a tangible

object, whereas a corporation, which generally performs services, is an intangible entity. As such, consistency of product experience was easier to achieve through an automated production process than it is to achieve consistency of services delivered by individuals with varying personalities and emotions (de Chernatony and McDonald, 1998). The third notable difference between a product brand and a corporate brand was claimed to be the shift in managerial responsibility; the reasoning being that a product brand is typically the domain of middle management – handled within the marketing department, whereas a corporate brand is the responsibility of senior management, particularly a CEO (Hatch and Schultz, 2001, 2003). This suggested difference between the remit of the two types of brands implies a contrast of managerial complexity, as expanded on in the fourth stated difference.

The fourth difference between the two types of brands is considered to be the distinct contrast in the audiences of product brands and corporate brands (Balmer, 2001a, b; Hatch and Schultz, 2001, 2003). Product brands primarily speak to consumers, whereas corporate brands speak to a wider range of stakeholders, such as customers, investors, employees, suppliers, partners and such like (Hatch and Schultz, 2001, 2003). It is this diversity of stakeholders that requires organisational brands to adopt an orchestrated corporate communications effort, as opposed to the marketing communication mix of a product brand (Balmer, 2001a, b; Hatch and Schultz, 2001, 2003). The communication of a corporate brand has to integrate the internal and the external into a coherent expression across a multitude of channels, and therefore, according to Hatch and Schultz (2001, 2003), the whole activity of corporate branding can be considered to be of a much greater strategic significance than that of product branding.

These seemingly clear distinctions between the two types of brands are, in many instances, not always apparent. In the publication Corporate Branding, Antorini and Schultz (2005) refer to the Italian clothing label Diesel as a corporate brand, not a consumer brand (page 70). While Diesel is more closely associated with consumer garments, the activities of Diesel's branding seems to fit the criteria for both the corporate and the product branding models: it is a consumer product brand that appeals to consumers, and also an organisational brand that has a corporate audience. Not only does Diesel communicate to

its denim-buying customers, it communicates to suppliers, partners, employees and investors – indeed, the same extensive audiences as other corporate brands. In such instances, Van Riel and Fombrun (20007) suggest that organisations prioritise their stakeholders 'and target those that are most crucial to the company for implementing its goals' (van Riel and Fombrun 2007; 162). Nonetheless the issue of distinguishing between product brands and organisational brands partially reflects the related issue of brand architecture, which is discussed in the subsequent section.

2·5   Corporate brand architecture

The strategic structuring of an organisation's operations and portfolio of products is what is known as brand architecture (Aaker, 1996). Brand architecture, which is essentially an explicit configuration of an organisation's nomenclature, can provide a point of clarification between an organisation's portfolio of products and services, and therefore offer a means of distinguishing between a product brand and an organisational brand. The most widely known model of corporate brand architecture is the one proposed by Olins (1989), where he observed that every organisation used either one or a combination of the three following brand nomenclature structures: a) monolithic, b) branded, and c) endorsed.

The first type, the monolithic brand structure, is characterised by an organisation that uses one visual identity – a corporate brand – for all organisational activities, including products, services and even subsidiary companies. The Shell (petroleum) organisation is an example of a monolithic identity system. The second type is a branded identity system where several visual identities – typically product brands – 'appear to have no relation to each other or to the parent concern' (van Riel and Fombrun, 2007: 121). An example of an organisation that uses a branded model would be Proctor & Gamble and its ownership of consumer brands such as Ariel, Duracell and Pampers. The third type is an endorsed identity system, which resembles a combination of the previous two systems. It is similar to a branded model in that a large corporation owns several sub-brands, however unlike a branded system the individual visual identities of the sub-brands contain the parent brand's visual identity as an endorsing signifier. Volkswagen's brand architecture is an

example of an endorsed identity system, where the organisational brand endorses the sub-brands, such as VW Golf, VW Beetle, etc. Apple would be another suitable example, whereby Apple Computer is the 'masterbrand' (Aaker & Joachimsthaler, 2000: 98) and its sub-brands are the Apple iPhone, Apple iPod and Apple iTunes.

Each of the three brand strategies has intrinsic strengths and weaknesses. Monolithic brand strategies are typically more cost-effective because every piece of communication or point of contact with the brand reinforces the single organisational identity (Olins, 1989; Aaker & Joachimsthaler, 2000). However the weakness of a monolithic brand structure is the potential for any negative publicity to taint the whole brand. There can also be perceived limitations to the diversity of the markets that monolithic brands can credibly migrate. Accordingly the monolithic brand structure is typically adopted by businesses that focus on organic growth rather than acquisitive businesses (Ind, 1997).

By contrast a branded structure is typically adopted by organisations that expand by acquisition, as this structure better enables organisations to segment their markets and therefore deliver more targeted brands that hold greater appeal to their audiences than that of the parent brand. Large consumer good manufacturers typically exploit a branded structure where the acquisition of valuable, intangible assets – specific brands and their relevance to particular consumers (de Chernatony and McDonald, 1998). This structure provides two significant advantages. First, this structure provides flexibility: as the parent brand retains its visual independency it is better able to sell any of its portfolio of brands – or indeed buy any brand – without adversely affecting the parent brand identity. Secondly this structure is considered to offer a level of protection to the parent brand: the visual independence of a parent brand identity minimizes any immediate association of a product brand with its owner in the event of any negative publicity. However the pressure on corporations to become more transparent and accountable for their actions has reduced, to some extent, this advantage (Ind, 1997).

An endorsed identity system, where a parent company displays its brand identity adjacent to the sub-brand, offers perhaps the greatest flexibility of the three types of systems as it provides the option of either linking sub-brands to the organisational masterbrand or

keeping sub-brands separate from the parent brand. Beyond the inherent flexibility, this system combines the benefits – to some extent – of the two previously discussed branding structures. However this system can also introduce complexity: while a monolithic identity is relatively simple and efficient, the endorsed system can involve more time-consuming analysis over determining the level of parent visibility. To address this issue Van Riel (2007) suggested that the parent brand and sub-brands should determine the level of parent visibility by comparing the alignment of the values of the parent brand and the sub-brand; and also by determining whether the sub-brand has sufficient market share and would benefit from any level of corporate endorsement – either strong, medium, weak or separate (van Riel, 2007). Essentially the endorsement system is considered a suitable structure when an organisation has a portfolio of related brands (products and services) and where the visibility of a parent brand would add credibility or reassurance to the sub-brand(s) market appeal.

Van Riel's recommendation (2007) clearly acknowledges that these three types of brand architecture, while distinct in principle, are not necessarily mutually exclusive. For instance, Volkswagen operates an endorsed visual identity structure through the endorsement of its product brands: Volkswagen Polo, Volkswagen Golf, etc. However, Volkswagen simultaneously operates a branded model through its ownership of Audi, Bentley, Bugatti, Lamborghini, Seat and Skoda, all of which are not visually endorsed by the parent organisation. Volkswagen's brand architecture therefore demonstrates that two models can successfully coexist, and that brand architecture – in some instances – undergoes continuous change. Indeed organisations 'are not static objects rooted in space and time' (Ind, 1997: 2); organisations can change significantly, often through mergers and acquisitions, and brand architecture changes accordingly.

Consequently the brand architecture of the majority of large diversified organisations will have gradually developed over time, from a simple system to a more complex form. Essentially it seems that organisations use whichever brand architecture will better enable them to maximize organisational assets. However there are occasions, according to van Riel and Fombrun (2007), when newly acquired or merged businesses discard all or part of their existing identities to avoid managerial conflict or to reduce the impression that

one company has acquired the other. Consequently, in such circumstances, a rebranding of the identity is usually the path of least resistance (van Riel and Fombrun, 2007).

2·6   Corporate brand identity management

As the scope of corporate brand identity extended beyond its preoccupation with consistency of visual manifestations, there became an increasing need for coherence of brand expression (Hatch and Schultz, 2001, 2003; Van Riel and Balmer, 1997). The complexity of a corporate brand's disparate organisational components required a management tool that would facilitate the process of achieving brand alignment (Hatch and Schultz, 2001). As such, scholars from a number of backgrounds – most notably design, marketing/corporate communications and organisational studies – sought to define and conceptualise the activity in a way that reflected the expanding, multidisciplinary nature of corporate identity (Birkigt and Stadler, 1986; Abratt, 1989; Olins, 1989, 1995; Van Riel, 1995; Van Riel and Balmer, 1997; Balmer, 2001; Van Riel and Fombrun, 2007). Indeed these three aforementioned contributory disciplines appeared to represent the three categories of organisational expression: symbolism, communications and behaviour.

This aforementioned conceptualisation, referred to as the 'identity mix', provided a means of capturing and circumscribing the scope of corporate brand identity expression (Birkigt and Stadler, 1986; Abratt, 1989). Each of the three constituent parts related to a particular set of organisational expressions. First, 'symbolism' referred to the visual and audible organisational expressions, such as the use of logos and taglines used to 'reveal' a given aspect of an organisation (Birkigt and Stadler, 1986; Olins, 1989, 1995; Van Riel, 1995; Van Riel and Balmer, 1997; Van Riel and Fombrun, 2007). Secondly the category of 'communications' referred to the transmission of an organisation's verbal signals (Birkigt and Stadler, 1986; Olins, 1989, 1995; Van Riel, 1995; Van Riel and Balmer, 1997; Van Riel and Fombrun, 2007). Thirdly, the category of behaviour encompassed organisational actions and initiatives, which are regarded for their ability to 'reveal' organisational identity (Birkigt and Stadler, 1986; Olins, 1989, 1995; Van Riel, 1995; Van Riel and Balmer, 1997; Van Riel and Fombrun, 2007). This corporate identity mix became the widely accepted vehicle for

aiding the analysis, diagnosis and management of corporate brand identity (Birkigt and Stadler, 1986; Olins, 1995; Van Riel, 1995; Van Riel and Fombrun, 2007).
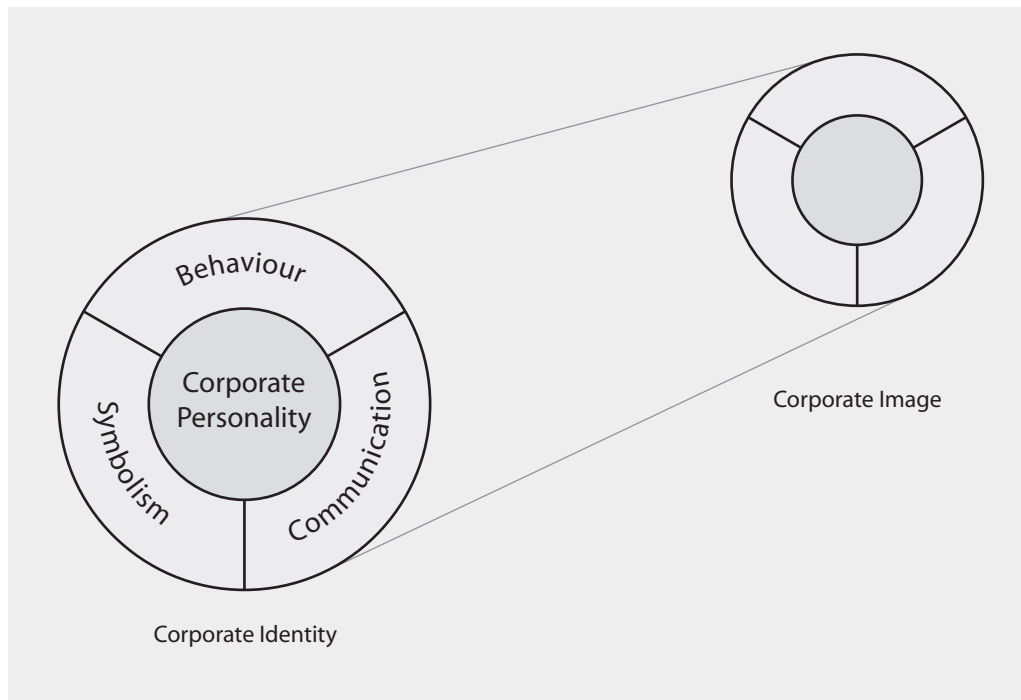
Figure 2·2. Title: Corporate identity in relation to corporate image. Source: Birkigt and Stadler, 1986.

However it soon became apparent to scholars, most notably Van Riel and Fombrun (2007) that the corporate identity mix had its limitations. A key observation was that whilst this mix seemed to capture the components of a corporate identity there was a noticeable lack of any reference to the relationship of the components, an example being the differing time factor between what can be considered static and dynamic components (Van Riel and Fombrun, 2007). Secondly the identity mix was concerned with the expression of corporate personality, based upon the assumption that an organisation has an appealing personality worthy of being the focal expression. Thirdly this mix schematically repre-sented the three expressive components as having an equal contribution to the corporate image. This suggestion lacked theoretical evidence and thus was disputed: Van Riel and Fombrun (2007: 69) emphasised the point that identity elements 'have an unequal impact on a company's image with target audiences'. Indeed, Olins (1978b) observed that the behaviour component of a corporate identity can have a greater impact than the compo-

nents of communication and symbols (Olins, 1978b; Van Riel and Fombrun, 2007). The final point, noted by Van Riel and Fombrun (2007) was that this identity mix depicted corporate image as a reflection of the corporate personality (via the corporate identity components) and therefore the mix suggested that corporate image was unaffected by context.

These aforementioned limitations emanated from the corporate identity mix's fixation on an internal perspective, without sufficient recognition of the contextual factors and external perspectives. Abratt (1989) presented the identity mix as a means of identifying gaps between the dual perspectives of corporate identity and corporate image, the prevailing idea being that the former related to an organisation's expressive components while the latter related to the recipients' perception of an organisation. This notion of brand perspectives, referred to as brand 'interfaces', was extended further by Balmer and Soenen (1999), and subsequently elaborated on (Balmer, 2001c), where empirical research was used as a basis for a more comprehensive explication of corporate identity interfaces.

This framework, mnemonically termed the AC^{2}ID Test, served as an analytical and diagnostic tool for identifying misalignments across the five interfaces of a corporate brand, these being: the *actual* identity, *communicated* identity, *conceived* identity, *ideal* identity, and the *desired* identity (Balmer, 2001c; Balmer and Greyser, 2002). The 'actual' identity referred to the existing identity of an organisation that typically would be informed by the ownership, leadership, organisational structure, activities and markets of a given organisation. The 'communicated' identity was concerned with the revealing of the corporate identity through controllable and non-controllable forms of corporate communications. The 'conceived' identity related to stakeholder perceptions of the organisation, traditionally associated with corporate image and corporate reputation. The 'ideal' identity constitutes the best possible positioning of an organisation in its market(s) at the present time in relation to its current competitive environment and wider context. The 'desired' identity is a reflection of the aspirations that corporate leaders have for their organisations. Whereas the ideal identity refers to the current time-frame, this interface is a reflection of a future vision of where the organisation would like to be at a specific point in the future, usually under favourable circumstances (Balmer, 2001c; Balmer and Greyser, 2002).

A recent critique of the AC^{2}ID test argued that the framework assumed organisations have access to and control over the different perspectives of a corporate brand (Cornelissen, et al, 2012). According to Cornelissen, et al, (2012), the framework's premise was that organisational leaders were able to manoeuvre between the interfaces of a corporate brand, i.e., actual identity, conceived identity. Therefore the implication was that brand custodians constituted 'privileged observers', and possessed the ability to exist independently of their social context, which presented ontological and epistemological inconsistencies.

The AC^{2}ID Test and its subsequent iterations, AC^{3}ID and AC^{4}ID, typified academic interest in corporate brand identity management, where the debates were orientated around the pursuit of alignment throughout a corporate brand's multiple dimensions (Balmer, 2012). Following on from Balmer's AC^{2}ID test Hatch and Schultz (2001, 2003) devised a gap-analysis model, which appeared to synthesize aspects of the identity mix with the five identity interfaces to produce a relational corporate brand management tool (see Figure 2·3). Here the authors argue that there are three potential gaps that can occur in a misaligned corporate brand: i) the vision–culture gap; ii) the image–culture gap; and iii) the vision–image gap (Hatch and Shultz, 2001, 2003; Shultz et al, 2005). The first constitutes a gap between senior management's corporate vision and the organisational culture, which can emerge when employees refuse to embrace or support the intended destination of senior management (Hatch and Shultz, 2001, 2003; Shultz et al, 2005). This gap has similarities to a misalignment between the 'actual' and 'desired' identity interfaces in the AC^{2}ID test.

The second is a gap between organisational culture and organisational image, which can occur when companies extend their brands into areas where they lack credibility (Hatch and Shultz, 2001, 2003). In these circumstances customer perception is misaligned with the actual identity, which can result in a damaged reputation among key stakeholders (Fombrun, 1996). This scenario can often be the result of a corporate brand failing to deliver on its promise – what the customer sees is not what the customer receives (or experiences). The third misalignment is the vision–image gap, which emerges when the image (perception) held by key external stakeholders is in conflict with senior management's

vision. As with the second gap, this misalignment centres on the perception of external stakeholders and, for instance, an overly ambitious management strategic vision, which may be incongruent with the corporate image (Hatch and Shultz, 2001, 2003).
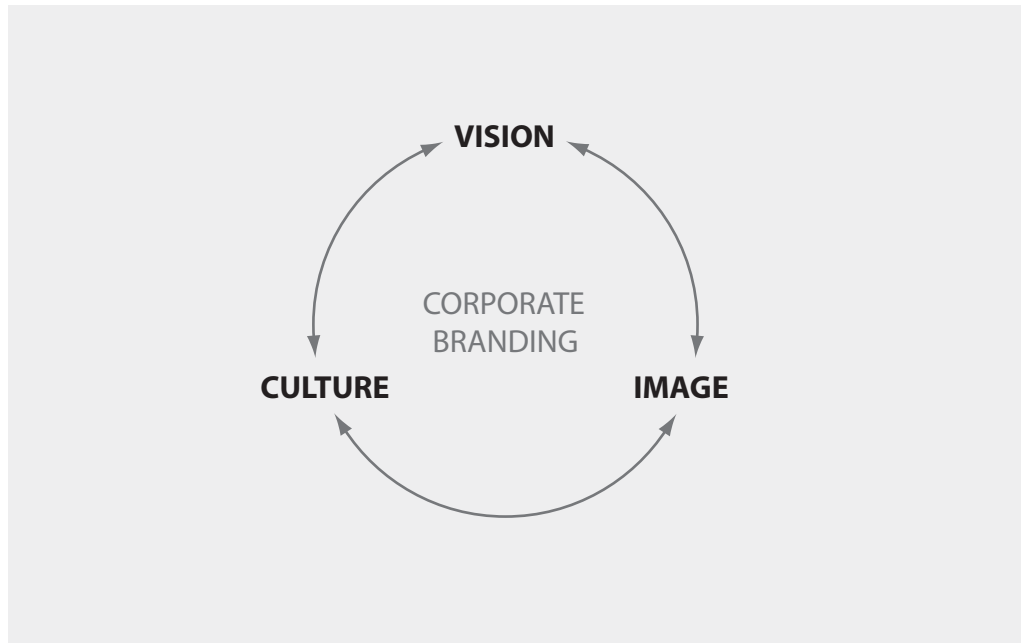
Figure 2·3. Title: Framework for understanding corporate branding. Source: Hatch and Schultz, 2001.

This vision–image–culture orientated model seemingly incorporates and synthesizes the key aspects of the identity mix components with the identity interfaces. A key strength of this gap-analysis model is its utility as a diagnostic tool for identifying misalignments in corporate brand identities. Accordingly, this model places emphasis on the management of existing corporate brands, as opposed to the effective development of new corporate brands, and therefore this framework is primarily concerned with the organisational change aspect of corporate branding. Corporate identity frameworks – and other related conceptualisation devices – have displayed tendencies to be more favourably disposed towards the discipline of their originators: Design orientated (Olins, 1978, 1989, 1995; Birkigt and Stadler, 1986); Marketing orientated (Abratt, 1989; Aaker, 1996, 2000; Kapferer, 1997; de Chernatony and McDonald, 1998; de Chernatony, 1999, 2001); Corporate communications orientated (Van Riel, 1995; Balmer and Soenen, 1999; Balmer, 2001a; Van Riel and Fombrun, 2007); Behavioural and organisational orientation (Albert and

Whetten, 1985; Hatch and Schultz, 2001, 2003). Despite these inclinations the component and gap-analysis models serve as diagnostic tools for analysing the complex, multidimensional phenomenon of corporate brand identity, in which consistency remains a key issue.

A significant limitation of these aforementioned alignment models, however, was that these models operated on the presumption that organisational definition is entirely constructed by the organisation itself, and therefore assumed a one-way communication channel (Cornelissen, et al, 2012). These alignment models, therefore, implied that such messages were predetermined and rendered the recipients' role as passive acceptance. Admittedly the interpretations of external stakeholders remains beyond the controllable remit of organisational leaders; nevertheless, whilst the pursuit of consistency throughout all manifestations continues to be a necessity in brand management, the models and its constructions were critiqued for their inaccurate perspective of the phenomena as a sender-dominated activity.

2·7   Summary

This chapter laid the foundation for the study by exploring the background of the theoretical developments in the field. The origins of corporate identity and its development into corporate branding were discussed; here attention focussed on the transition from a specialised graphic design activity to a highly multidisciplinary management activity, and the complex issues that this entailed. Accordingly the discussion directed attention to the significant developments of the field, which was preoccupied with the optimisation of brand architecture and the problematic distinctions between organisational brands and product-level brands. Subsequent consideration was given to corporate brand identity models that focussed on depicting components – to encompass the scope of extensive corporate brand identity activities. The key issue here was the continual pursuit of consistency – reducing the misalignment – of the increasingly multidimensional components of a corporate brand. The ensuing discussion explored the related notions of brand in-

terfaces and gap-analysis theory, where such models are presented as diagnostic tools for identifying misalignments in brand identities.

In addition to situating the study within its context, this chapter outlined the migration from the practitioners' preoccupation with the visual manifestation of corporate brand identity to an activity that attracted scholarly attention on all aspects other than the visual manifestations. Given this limited academic interest, there is insufficient theoretical understanding of the strategic development of the visual manifestations of corporate brands. This issue is examined further in chapter three.

3 Literature Review II:
Visual communication strategies of corporate brand identity

3·1 Introduction

Corporate brand identity, like many valuable assets, has attracted an increasing amount of attention from scholars, practitioners and senior managers. The interest has primarily focused on the either brand architecture or brand alignment. Brand architecture is a key concern because it addresses how organisations can better structure – or optimise – their existing, or potential, portfolios of products, services and subsidiary business units. The issue of alignment has received necessary attention because of the need for organisations to ensure that their brands are consistent throughout every touchpoint (Balmer and Soenen, 1999; Balmer and Greyser, 2002; Hatch and Schultz, 2001, 2003; Balmer, 2012).

Nevertheless, while these two big issues have received the worthy scrutiny, the visual manifestation of a corporate brand identity has received much less attention. Yet this component of a brand identity is no less important. Indeed, a better understanding of the visual manifestation of brand identity could reduce the likelihood of ill-conceived brand identity campaigns, of which there are many examples. For instance, the Post Office changed its name to Consignia, only to revert to Royal Mail (Guardian, 2002). The consulting arm of PricewaterhouseCoopers was branded 'Monday,' at a reported cost of £70m (BBC News, 2002; Verdin, 2002). British Airways is another example of a disastrous rebranding campaign that was quoted as costing in excess of £60m (Marston, 2001; Verdin, 2002). These examples clearly reveal the expense of developing, implementing and rectifying brand identities, but, additionally, they also highlight a need for better understanding the strategic choice behind an identity's proposition and primary visual manifestation.

In each of these three cases, the objection to the branding effort was directed towards the expression of the brand, clearly as a result of a specific communication goal. In the case of British Airways, their intention was to shift the focus from communicating origin and activity, via the symbol of the Union Jack, to communicate the concept of being a global company through the use of disparate 'ethnic' tail fins (Hatch and Schultz, 2001). The British Airways example clearly illustrates how essential it is for organisations to select relevant propositions and to express them appropriately through the visual manifestation of the identity.

Chapter three will examine the theories and strategies behind the communicative element of the visual identity of organisations. The communication strategies of consumer facing brands – in addition to corporate brands – are given consideration because the distinctions between the two types of brands are becoming increasingly blurred. In addition to the ambiguity of the two types of brands, the theories that have driven consumer branding practices have also informed the practices of corporate branding. It is also essential to examine the factors that drive corporate branding activity, in order to better understand the context in which communication objectives are devised. Following on from this will be an exploration of the research problem, along with its relevance and justification for study. And finally, the pertinent points of this chapter are summarised.

3·2   The visual manifestations of organisational identity

The visual manifestations of an organisation's identity extend to all forms of visible components (Olins, 1984, 1989, 1995, 2003, 2008; Baker and Balmer, 1997; Dowling, 1994; Melewar and Saunders, 1998). Melewar and Saunders (1998) ascribe four components to the visual identity of a brand, these are: i) nomenclature, ii) logotype and/or symbol, iii) typography (letterstyle of supporting typeface), iv) colour. Allen and Simmons (2003: 114) offer a practitioner's perspective by stating that a visual identity 'might comprise' of a logotype, symbol, colour and typography. Academic definitions have extended beyond these four devices to include a slogan (Melewar and Jenkins, 2002) or a slogan and 'ad-

ditional graphic elements' (Van den Bosch, De Jong and Elving, 2005). This broadening of the boundary definition better accommodates textual manifestations such as descriptors, positioning statements, slogans straplines, and suchlike, which can function as distinctive additional signatures. Van den Bosch, De Jong and Elving's (2005) expansion of the definition to include 'additional graphic elements' enabled the accommodation of 'imagery' within a visual identity, and therefore better encompassed the scope of the domain.

From another practitioner perspective, Olins (1995) expressed a more detailed list in which he inferred that there were three categories of visual manifestations consisting of i) products, ii) graphic information, and iii) environments (Olins, 1995). First, organisational products have intrinsic visual properties that are most apparent in an object's three-dimensional form. Secondly, the category of graphic information encompasses all communicative and explanatory elements that relate to the products and/or services; examples of this type of manifestation would include stationery, digital publications, advertisements, packaging and operating instructions. Thirdly, environments encompass an organisation's interior spaces, such as exhibition spaces and retail outlets, and exterior architecture. This category may include signage systems and uniforms (Olins, 1995).

Products	Communications [Graphic]	Environments
Product Design	Advertisements	Exhibitions
	Instructions	Exterior architecture of buildings
	Packaging	Interior design of offices
	Point of sale	Retail outlets
	Promotional merchandise★	Showrooms
	Publications	Signage systems★
	Stationery	Uniforms★
	Vehicle livery	
	Web-based communication	

Table 3·1. Title: The scope of visual identity, adapted from Olins (1995) ★ represents added items.

This list of manifestations provided an intentionally explicit list of visual outputs for the designers of corporate identities to consider the application of a brand idea to a disparate set of touchpoints. This practitioner-orientated categorisation, however, lacked dis-

tinction as a classification tool. First, the 'signage' manifestation could be assigned to the category of [graphic] 'communication' (because signage is technically a piece of graphic communication) and environments (because a piece of signage become part of an environment in which it becomes situated). Similarly a visual manifestation labelled 'uniform' would fit within the boundary of 'graphic communication' and within the scope of 'environments' because uniforms are often printed with nomenclature and also they form part of an environment when worn by staff who occupy a retail space, for example. The crux of this classification issue is the problematic distinction between the function (communication) and the situation (environment). Accordingly this practitioner perspective was concerned with the application of visual identity (advertisements, interiors, etc) whereas the scholarly perspective focused on the root elements – the inputs of a visual identity system (colour, typeface, etc).

Aside from such classification ambiguity, the aforementioned devices are generally considered to be within the domain of a corporate brand's visual manifestations, regardless of how such devices are grouped. There is less ambiguity, however, on what is considered the primary visual manifestation of a corporate brand identity. Wheeler (2009: 66) considers the devices of 'colour, imagery and typography' as a visual 'support system'. Aaker claims that 'a strong symbol can be the cornerstone of brand strategy' (Aaker, 1996: 85). In making reference to corporate identity, Argenti (2007: 70–75) makes reference to 'logos and names' when discussing the visual manifestation of a brand identity. By contrast Blackett (2002: 16) considers 'the name is the most important element of the brand as its use in language provides a universal reference point'. Whilst this view recognises the focal point of the name, it fails to acknowledge that a name – any name – has a visual manifestation at a textual dimension and at a typographic dimension, and therefore a name cannot be separated from its logotype (if the postulation of consistency is followed). Blackett (2002: 16) later acknowledges this issue by asserting:

> *'This is not to say that brands achieve true visual distinctiveness through their names alone. Nike without its tick-like swoosh, Camel cigarettes without "Old Joe", the supercilious dromedary, Michelin without exuberant Monsieur Bibendum, McDonald's without its Golden Arches would be paler properties indeed. Brands like these – and many thousands of*

others – rely for their visual distinctiveness on the harmonious combination of these elements
and the consistency with which this is maintained.'
Source: Blackett (2002: 16).

This interconnected relationship between the name and the visual expression is conveyed with absolute assurance by Olins (2008: 30) as he clearly articulated what he considers to be a corporate brand's primary visual manifestation:

"The prime identifier for almost all brands is the symbol or logo. The other tangible elements –
colours, typefaces, straplines or slogans, tone of voice and style of expression (sometimes called
the look and expression) – are also very important, and collectively form the visible recogni-
tion pattern. But the central element of that visible recognition pattern is the logo itself. This
usually lies at the heart of a branding programme. Its prime purpose is to present the core idea
of the organisation with impact, brevity and immediacy. The logo encapsulates the brand."
Source: Olins (2008: 30.)

Olins' reasoning is based on a symbol's capacity to encapsulate an organisation's 'core idea', which, by deduction, cannot entirely be conveyed by the supporting visual devices. It would seem logical to assign greater priority to a logotype and/or symbol when considering that sub-components can be more easily modified: In a recent case the McDonald's visual identity was changed from their signature bright red to a mid-tone green, claimed to be a signifier of their shift to adopt a healthier product offering (Barriaux, 2007). Such modification of a sub-component, argues the author, has less impact than a change of name or an introduction of an entirely new symbol. Indeed numerous branding programmes have subtlety modified their established and recognisable symbols; Shell and Starbucks are two immediately obvious examples (Shell, 2012; Nurko, 2011). Indeed, analysis of past rebranding cases indicate that symbols and nomenclature are changed only when situations have become unsustainable and brand equity and stakeholder relevance has significantly diminished; Marks & Spencer is a notable example of a transformation of visual identity as a means of signifying organisational change (Murphy, 2000).

In relation to the use of colour in brand identity, a point worth noting is that the origins of branding emerged from the activity of searing nomenclature – typically monograms – on to livestock, where colour was unnecessary (de Chernatony and McDonald, 1998; Blackett, 2003). Today's brand symbols also have instances where colour reproduction is impractical, such as for internal documentation (mono-laser printing) and therefore brand marks are designed to have a black and white version of the symbol in addition to a full colour version (ABB, 2013; Adobe, 2013; Anabioil [Shell], 2013; GE, 2013). From an intellectual property perspective on colour the Patent Office's Trademark Registration Guide (Crown, 2002: 13) expresses the following: 'If you want to claim that any colour in your mark is a *feature* of the mark, give details …' [emphasis added]. Here, the use of the word 'feature' suggests that colour is considered a supporting visual element and therefore implies a dependent relationship. In considering this view it is worth noting that the application of colour has to take a form: in other words colour has to be contained within a shape, either graphically or physically (such as the edge of an electronic display or, perhaps, the boundary of a printed sheet); colour, therefore, is dependent on being bound by form.

Furthermore, it could be argued that whilst a specific shade of colour might be associated with a specific organisational brand, the colour would function as an indexical linkage rather than an independent identificational tool. Such reasoning would similarly apply to the sub-components of typography, imagery and slogans. Since these devices are not considered the primary device, any modification of such devices has shown to be less disruptive – in relative terms – to the overall identity scheme (Barriaux, 2007). Accordingly, uniforms tend to be visually updated, websites might be refreshed and annual reports will change visually without significantly altering the brand's core visual identity.

3·3   The purpose of a brand mark

A brand mark traditionally functioned as an identificational device, typically used to signify ownership and origin (Blackett, 2003; Hyland & Bateman, 2011; Olins, 2003). The situational limitations of image reproduction and the restrictions on the application of a

mark (e.g., branding livestock) meant that it was essential for brand marks to be a simple, economical unit of expression. Over time, the brand marks of products became shorthand signifiers of reputation and quality, and thus, subsequently, offered consumers guidance through an increasing array of choice (Allen and Simmons, 2003). However it is a symbol's visual economy that is regarded as the key to its power of communication (Hyland & Bateman, 2011; Olins, 2008).

Practitioners and scholars assign great credence to the notion of symbols being powerful communication tools (Hyland & Bateman, 2011; Olins, 2008; Van Riel, 1995). A symbol's ability to convey complex messages with limited apparatus was pithily articulated by Abram Games's design philosophy: 'Maximum meaning, minimum means' (Moriarty and Rose, 2003; Games, et al, 2003: 1). One of the leading practitioners, Olins, asserts that 'Symbols are immensely powerful. They act as visual triggers that work many times faster and more explosively than words' (1995: 11). Interbrand advocate this view by claiming that a brand mark: 'is the calling-card, the scene-setter and the one-second summary of all of the branding [an organisation] will ever do' (Cottineau, 2001). Equally scholars have endorsed these practitioner viewpoints; for instance, Van Riel (1995: 39), stated that: A 'good' symbol is thought to ignite the short-term memory, 'without the need for a long exposition on the company and what it has to offer' and therefore 'reduces the redundancy in communication to a minimum'. A brand mark's ability to express complex ideas with such limited visual apparatus is uncontested; however there lies a more intriguing question, from a brand strategy perspective, of *what* brand marks are designed to express.

According to Olins, the purpose of a symbol is to 'present the central idea of the organisation with impact, brevity and immediacy. The symbol encapsulates the identity.' (1995: 11). It is unclear, however, from this statement and from the publication what constitutes a 'central idea' of an organisation. This theoretically ambiguous statement characterises the somewhat limited conceptual debate on brand mark expression, and thus forms the central concern of this thesis.

The subsequent discussion explores this issue and the various conceptual developments of brand mark expression in relation to the evolution of the discipline. This exploration is

structured around Olins's (1995: 3) suggestion that a corporate brand identity can project four things: *Who you are; What you do; How you do it; Where you want to be.* These afore-mentioned pivots provided a conceptual structure with which to focus attention on an organisation's brand mark expression (Olins, 1995). The first pivot, *who we are,* essentially addresses an identificational issue. The second pivot, *what we do,* broadly provides an in-dication of the sector or industry. The third pivot, *how we do it,* refers to the corporate at-titude, core values and point-of-differentiation. The fourth pivot, *where we want to be,* con-veys the future aspiration of an organisation. A brand mark can project any combination of these pivots and in some instances can project all four pivots simultaneously, though not necessarily with equal weighting. The subsequent discussion uses the structure of these four pivots to evaluate the literature relating to the expressions of brand marks.

3·4   Ownership and personification of the organisation

In the formative period corporate identity designers were concerned with 'revealing' the corporate personality (Olins, 1978, 1989; Balmer and Gray, 2003). The prominent corpo-rate identity designer, Paul Rand, had the view that the design of a brand mark 'should embody in the simplest form the essential characteristics of an organisation' (Rand, 1950, cited in Heller 1999: 154). This approach reflected the attitude of the time (1960s and the 1970s) that corporate identity was an identificational tool that sought to express the cor-porate personality through consistent, professional design.

In the mid twentieth century corporate personality and ownership was typically implied in many corporate names, often derived from the founder's surname(s). Two examples of this are the German engineer, Karl Benz, founder of what was to become Mercedes Benz, and another fellow compatriot would be Max Braun, engineer and founder of the electrical consumer products company Braun (Bos and Henrion, 1990; Braun, 2012; Mercedes-Benz, 2012; Ind, 1997). This ownership-led nomenclature provided an explicit link to the organisational leadership, which subsequently informed the corporate person-ality. Olins (1978, cited in Balmer and Greyser, 2003: 60) makes reference to this − in the context of praising the leadership of Laker Airways, Habitat and Lotus − by stating that

corporate identities 'reflect the preoccupations, the energy, and the attitudes of the people who own and manage them'.

Such entrenched corporate personalities were not confined to owner-led organisations. When the notable German electrical company AEG was led by Walter Rathenau (circa 1915) it was claimed that his energy and personality directly influenced the culture of the organisation. (Olins, 1978, cited in Balmer and Greyser, 2003: 60). For many large organisations the corporate personality was often a direct extension of the founder or chief executive officer's personality. This could be seen, according to Olins (1978), in Habitat when it was led by Terence Conran, and remains a discernible feature in Richard Branson's Virgin organisation. The corporate personality axiom is apparent in the conceptualisation of corporate identity, whereby the identity mix 'crystallises the underlying personality of the organisation' (Van Riel and Fombrun, 2007: 68).

The focus on corporate personality as a means of informing the visual identity was depicted in Birkigt and Stadler's model (1986), where the identity mix elements are illustrated as being mechanisms for expressing the corporate personality. This notion was also apparent in the metaphorical personification of identity elements in Balmer and Soenen's (1999) identity mix, consisting of 'the soul', 'the mind', and 'the voice'. Melewar and Saunders's empirical research (1998: 291) added credence to this choice of expression by claiming that an organisation's 'personality and identity will become the biggest factor in consumer choice between its products and those of another'. Furthermore, Albert and Whetten (1985) suggested that the first criterion of corporate identity was the 'claimed central character', a personified expression of organisational essence.

The strategy of expressing the corporate personality, however, had a limitation. First, Olins observed that problems inevitably arise when charismatic and appealing leaders choose to leave or retire, resulting in a scenario that Olins has termed 'the personality deficit' (Olins, 1978). Furthermore, while large organisations are run by leaders whose personalities – to some extent – may permeate the culture of their organisations, it cannot be assumed that all leaders' personalities are appealing, warm, or friendly – the kind of qualities that organisations wish to be perceived as having. This process, whereby presumably designers

select the most appealing aspect(s) of the corporate personality to project through the brand mark and broader visual remit, is explicitly referred to throughout the literature but the lack of operational clarity is apparent (Birkigt and Stadler, 1986; Olins, 1978; Rand, 1950, cited in Heller 1999).

As such, the translation of the more appealing aspects of corporate personality into a visual device remains equivocal, despite the importance ascribed to this prominent expressive strategy. Nevertheless the underlying assumption in this strategy is that the expression of corporate personality would appeal to the intended audiences of the brand, and therefore provide a sufficient point of difference. This notion of relevancy and differentiation, as acknowledged by Melewar and Saunders (1998), are considered in section iii.

3.5   Organisational expression of activity

The previous section explored how, in the early years of industrial expansion, many large organisations devised organisational nomenclature that expressed ownership. Related to this is the nomenclature combination that uses origin and activity to define an organisation (Room, 1992). Origin and activity expressions operate as descriptive compounds, as seen in the cases of British Airways and British Telecom (Graham and Peroff, 1992; Murphy, 1992; Olins, 2008). By definition, this type of activity expression eliminates the need for lengthy explication and the need to invest in marketing communications to 'inform' stakeholders on organisational activity (Graham and Peroff, 1992). Despite the limited empirical research, this would seem a logical and efficient strategy of brand expression for new organisations that sought to explicitly convey their business domain to their external audiences.

As organisations become known for their activities over time, cases have shown that activity expressions can be restrictive if an organisation's scope of activities outgrows their domain-specific nomenclature (Wolff Olins, 2002; 2009e). In such instances it is apparent that subtle modification, as a means of diluting the restrictive reference to specific activity and preserving brand equity, appears to be the most suitable course of action (Maddox,

2003; Muzellec and Lambkin, 2006). Such evolutionary modification is evident in several brand identity case studies, where descriptive brand names have been contracted into shorter abbreviated forms: BP, formerly known as British Petroleum, IBM, formerly International Business Machines, and GE, formerly General Electric (Aaker, 1996; BP, 2013; Heller, 1999). Further, the subtle modification of visual symbols, as in the case of UPS and BT, also supports this notion of brand evolution (UPS, 2013). Such advancements, however, presuppose that organisational reputation is favourable and that any modifications are a basis for aligning expressions in order to better reflect the actual – or aspirational – organisation activity.

It is apparent throughout the early practitioner literature that designers consistently used activity as a means of visually depicting organisational identity. In a biographical account of the renowned designer Saul Bass, reference is made to activity expressions in several cases of his corporate identity portfolio. In describing his identity design for Minolta, Bass states that he decided 'to use the metaphor of light – as the origin of all information – to express Minolta's pursuit of excellence in the visual field' (cited in Bass and Kirkham, 2011). In a sense organisational activity is used as a domain of operation and as a qualifier of how the activity is performed. This notion of activity influencing the visual design of a brand mark was apparent in Bass's visual identity for Continental Airlines:

> *"Birds and bird-like forms are the most frequently used airline symbols. They are inherited from the early years of the airline industry, when flying like a bird was a wonderful notion indeed. But it's hardly the most appropriate symbol for a jet-age airline. The objective of the new Continental symbol was to capture the basic power thrust notion of the jet engine, as well as the airflow patterns of high speed flight." (Bass and Kirkham, 2011.)*

The influence of activity in the design of a brand mark is apparent in the above quote, and typifies the early approach of identity designers whereby identity seemed to be defined by activity (in addition to origin and ownership). In the explanation given by Paul Rand, another prolific identity designer, he makes reference to the visual suggestion of the circuit board in his visual identity design for Westinghouse (a manufacturer of electri-

cal components). In Rand's explanation of his identity design for UPS, which featured a prominent symbol of a bow-tied package, he alluded to the notion of explicit simplicity in his informal evaluation of his mark-making (Heller, 1999). European identity designers also used activity as a driver of organisational expression: with reference to Bass's comment on aviation brand marks using bird symbols, Otl Aitcher designed a stylised bird as a symbol as part of the visual identity for Lufthansa, an explicit expression of the organisation's core activity (Rathgeb, 2006). Aitcher explored a similar notion of organisational definition in his design of the ERCO visual identity, where he created a brand mark that expressed the essence of the organisation's activity (lighting products):

> *"The ERCO logo represents more than just the name of the company … it expresses visually what the company does simply by means of four letters in four weights, progressing from bold to light. In this way the logo gradually illuminates." (Rathgeb, 2006: 171.)*

From surveying prominent visual identity schemes that occurred between the 1950s and the 1980s, it is apparent that, in a large number of cases, activity informed the designer's approach to visualising organisational identity. The literature revealed that designers made no explicit indication of considering the relationship between the organisational name and the visual depiction of the name. In other words, visual depictions of organisational activity seemed to occur irrespective of descriptive nomenclature, often resulting in a tautological message. In the case of British Airways, the message construction of the 'British' name alongside the symbol of the Union Jack was changed during the 1997 rebranding exercise; the subsequent visual identity presented the British descriptive name alongside so-called 'ethnic' art – which bore no visual relevance to the notion of British (BBC, 2001; Harrison, 2000). The result of this ill received brand identity was that the message structure appeared contradictory: British by name but not by the brand's visual manifestation Marston, 2001).

The rebranding of UPS highlighted the associated weaknesses of activity expressions, principally that it can be difficult for such devices to maintain relevance. According to a UPS spokesman (Bloomenkranz, 2004: 69) the former UPS brand mark [featuring the

bow-tied parcel] 'no longer fully expressed the company's capabilities. In fact it was quite limiting …'. As this article revealed, an explicit reference to a specific organisational activity can potentially become a hindrance if the scope of activity changes significantly. Furthermore, large diversified organisations would be unable to be defined by their activities. A more immediate limitation, however, is that by expressing a generic category of activity, there can be a lack of emphasis on expressing a point of difference. This is discussed in the subsequent section.

3·6   Organisational expression of strategy and visual differentiation

In 1989 Olins conceptualised corporate identity as being a vehicle for 'making business strategy visible through design' (Olins, 1989). This perspective, whilst narrowly conceived in relation to its emphasis on visual identity, had a significant influence on corporate identity practice during the decade of the 1990s (Balmer and Gray, 2003; De Chernatony, 1999; Urde, 1999). The thrust of Olins' view was that, in addition to the visual manifestations being a mechanism for expressing business strategy, such manifestations can signify the positioning of an organisation within its competitive environment (Olins, 1989, 1995). Here, Olins propagated the idea that a distinctive visual style was key to the success of a corporate identity programme, and was essential for any organisation intending to differentiate themselves from their competitors. This logic was based on his practice-based observations that generic visual identities arise when competitors imitate the visual style of the most successful organisation within their respective industry. Such similarities can be observed from the distinctive application of rotational symmetry in the financial sector (see Figure 3·1).

> *"A generic [visual identity] is usually created by chance, by what the leader in the industry happened to choose to do at a certain point in its development because it seemed right for the circumstances. Then peer-group pressure takes over. Everybody wants to look like the most successful business in the industry – regardless of whether or not it's appropriate – so everybody starts to emulate the visual style of the industry leader." (Olins, 1989: 64).*
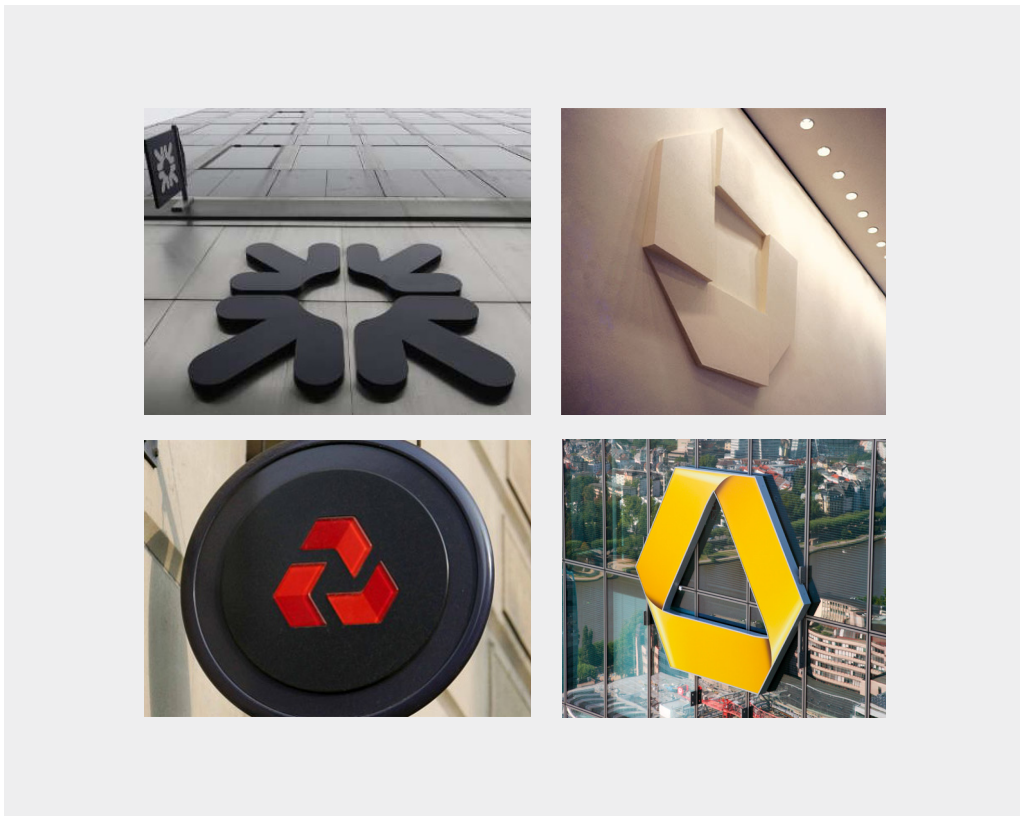
Figure 3·1. Title: Visually generic brand marks within the financial sector.

The recommendation was that organisations should avoid the industry generic identity by adopting a more distinctive visual language, and, by implication, adopt a strategy of differentiation as a foundation for expressing the visual identity (Hooley, Saunders, and Piercy, 1998; Olins, 1989). However, Olins was not explicitly recommending that organisations pursue a strategy of differentiation but rather to break the generic language of visual imitation by striving for a more *visually* differentiated identity. Nevertheless, if we accept Olins's argument that 'corporate identity is strategy made visible through design' then it follows that visual differentiation is a signifier of strategic differentiation (Olins, 1989). Schultz (2005: 42) adds credence to the typical notion of corporate branding being primarily concerned with differentiation by stating that 'the foundation of corporate branding has most often been the search for strategic differentiation'. Whilst Olins's reasoning for visual distinction was rational, there was a lack of theoretical insight into what aspect(s) of business strategy would be worthy of translation to a visual identity. Without

a thorough understanding of the principles and the translation process, however, the conjecture lacked a substantive theoretical platform.

This tension between genericism and differentiation was explored at a strategic level by Deephouse (1999). The findings from this study suggested that by conforming to the industry norms – and therefore by implication expressing a generic visual identity – organisations gain legitimacy (Deephouse, 1999). Organisations that pursued a differentiated strategy were more likely to be perceived as distinctive but had to accept the loss of legitimacy gained from a generic identity (Deephouse, 1999). This research had implications for Olins' postulation that visual identity was an expression of strategy. Olins' advocacy for organisations to pursue a differentiated identity implied that differentiation – as a strategic choice – was the optimum strategy for all organisations regardless of the context and conditions of an industry. Whilst the reasoning for visual identity to function as a vehicle for strategy expression held credence, it remained unclear which aspect of business strategy should become a prioritised expression.

Olins's use of the term 'positioning' alluded to marketing's product-orientated notion of expressing a point of difference (Aaker, 1996; Olins, 1989; Blackett and Denton, 1992). This emphasis on differentiation, prevalent in product-level branding, reflected the 'convergence' of product branding theory and corporate identity theory, as recognised by Knox and Bickerton (2003). However the prospect of identifying and signifying a point of difference presents a much greater challenge for a large diversified organisation, whose activities can span multiple products and sectors, than a singular, focused product (Hatch and Schultz, 2003). As an expression of differentiation large organisations typically focused on expressing organisational values through their organisational behaviour, as this provided a mechanism for aligning disparate activities (Lencioni, 2002; Olins, 1989; Urde, 2003). According to Lencioni (2002: 114), core values 'are the source of a company's distinctiveness' hence the growth in corporations cultivating core values. However, as Lencioni's article proposed, a large number of organisations were advocating identical 'core' values, and consequently, rather than achieving differentiation, such activity produced a counterproductive result.

The recommendation was that, to avoid the chorus of 'cookie-cutter' values, organisations should focus on differential values in order to achieve distinction (Lencioni, 2002). Lencioni's assessment of the limitations and the misuse of different types of organisational values provided greater clarity in the use of organisational values within corporate expressions – and, in particular, visual identity design. Whilst such advocacy informed the consideration given to value expressions in corporate brand identities, the theory underpinning the application of such expressions – in relation to knowing what conditions make such expressions for a corporate identity advantageous – remained inadequate.

3·7   Organisational expression of vision/mission

In accepting the notion of corporate brand identity being a visual manifestation of organisational strategy, the central issue becomes determining which aspect of strategy – in a given situation – should be the prioritised visual expression. A key consideration here is that, as argued by Mintzberg, 'strategy is not a static process, rather it is emergent and subject to adaptation' (cited in Ind, 1997: 51). A corporate strategy, therefore, would be devised for a given competitive environment, and therefore may need to respond to any changes within its context (Ind, 1997). Porter, however, recommends that 'strategic positioning should have a horizon of a decade or more, not of a single planning cycle' (Porter, 1996: 74).

This issue of longevity has implications for corporate brand identity programmes, in terms of what aspect of strategy holds the greatest potential to remain relevant over time, and thus warrants prioritised expression. Research has shown that companies that have a vision 'enjoy enduring success' (Collins and Porras, 1996: 65). As business strategy adapts to industry forces the vision remains fixed, and, as such, provides an organisation with a relevant beacon that has the long-term relevance necessary for the foundation of a corporate brand mark (Collins and Porras, 1996). Indeed Balmer discovered that 'most corporate identity projects adopted a vision-driven approach', as they often coincide with leadership change, i.e., an incoming CEO or a management buyout, for instance (Balmer and Soenen, 1999: 69). Furthermore, Balmer and Soenen (1999: 70) followed this observation

by stating: 'With this approach the main task of the consultant was to clarify the vision of the chief executive, and then to translate it into a new visual identity.'

The problem here, however, is that this process of translating the vision into a brand mark remains ambiguous, primarily because organisational vision can be a 'fuzzy' construct (Collins and Porras, 1996: 66). In relation to Collins and Porras's conceptual model (1996), organisational vision was composed of two constituent parts: 'core ideology,' which was formed from the organisational purpose and the core value, and 'envisioned future', composed of a 'big, hairy, audacious goal' and a 'vivid description' (Collins and Porras, 1996: 67). In other words, organisational vision consisted of a combination of values, purpose, and, in less sensationalist language, an aspiration. A vision-orientated corporate identity, therefore, could feasibly express any individual or combination of these three components; indeed an examination of consultancy case studies reveals that various combinations of these components have been prioritised in various corporate brand marks.

In a paper published in the Design Management Journal, written by two directors responsible for the Orange (telecommunications) brand identity, it explained that the Orange brand mark was designed to convey 'a set of values' (Hamilton and Kirby, 1999: 41). It was apparent that, in determining the expression of the Orange brand, external relevancy took precedence over internal galvanisation, i.e., the values were not internally driven but, rather, cultivated for their external appeal at that particular point in time (Hamilton and Kirby, 1999: 41). Such communication strategies may be effective for the more consumer-orientated corporate brands but the limitations of this strategy remain unclear, in terms of the sustainable relevancy of externally cultivated value expressions.

In the case of BP (formerly British Petroleum), the design of BP's Helios brand mark was intended to express an aspirational vision that consisted of being committed to being 'beyond petroleum' which coincided with a set of environmentally sensitive values (BBC, 2000; Macalister and Cross, 2000; Marketing Week, 2010). However, whilst BP had apparently engaged in activities to add credence to its claim of moving 'beyond petroleum', its renewable activities in 2008 – eight years after the launch of the new brand identity – were reported to account for only seven per cent of its energy mix (VanAuken, 2010).

Despite BP's augmentation of clean energy in their activities, there remained a credibility gap between their actual activities and their aspirational activities (BBC, 2000; Macalister and Cross, 2000; Marketing Week, 2010).

The literature relating to the construction of mission and vision statements recommends focusing on long term, 'big, hairy audacious' goals, requiring '10 to 30 years of effort to complete' (Collins and Porras, 1996: 73). Such a recommendation, for a brand expression, is likely to present a credibility gap. In the aforementioned case it could be argued that the credibility issue was located with the *expression* of the vision, rather than the vision per se. BP's vision of being 'beyond petroleum' seems an undeniably virtuous mission, given nature's finite resources; however the vision was articulated in such a manner that it suggested that the mission had already been accomplished, as opposed to being a desired future state. From this perspective, it can be seen how such a brand expression might invite the kind of criticism directed at BP (BBC, 2000; Macalister and Cross, 2000; Marketing Week, 2010).

Furthermore, from a strategic standpoint, the clean energy symbolism had been visually expressed by competitors. Repsol's visual identity, for example, made effective use of a solar symbol to denote the place of origin and the genericism of clean energy (Olins, 1995; Wolff Olins, 2009f). Similarly, Q8's visual identity incorporated a symbol that related to both the origin of the organisation and the notion of clean energy through its symbolic use of sail booms (Olins, 1989; Wolff Olins, 2009g). Therefore, when considered within context, BP's supposed leadership positioning was not visually expressing a unique message, and, as discussed, the brand expression merely provided a point of criticism.

The use of such statements within the context of a corporate brand's visual identity remains an under explored domain. Accordingly, academic attention has not been directed to the translation process of these type of expressions (or indeed any of the previously mentioned expressions). The literature regarding the use of mission and vision statements generally refer to 'definition' as the related aspects of vision, mission and purpose. The term 'purpose' is commonly used to refer to an organisation's reason for existence (David, 1989; Hooley, et al, 1992; Melewar et al., 2005). The term 'mission' was initially con-

sidered to be a declaration of a desired future state (David, 1989) but has since become considered as a succinct rendering of organisational purpose (Abratt, 1989). The term has since become believed to be an indication of the operational perspective of the long-term aspiration(s) (Hooley, et al, 1992). Organisational vision, meanwhile, appears to be assigned a more aspirational, future orientated role (Ingenhoff and Fuhrer, 2010).

In relation to these components of vision and mission statements Hooley, et al (1992) recommended that vision statements be specific. Empirical research conducted by Hooley, et al (1992) found that greater specificity of vision statements better facilitated internal 'buy-in', and enabled greater clarity in the operationalisation of the strategic intent. By contrast, David (1989), following a content analysis of 75 mission statements, argued that precise vision statements restricted management creativity and the ability to manoeuvre, whereas vague vision statements that were broad in scope provided management with a sense of guidance, direction, and motivation. This issue of specificity was apparent in the case for BP. There is a need, from a brand expression perspective, for greater research regarding the contextual parameters of these recommendations.

An additional point of interest in the aforementioned literature is that, in the discussion of the structure and focus of such statements, there was a common reference to the external audience. For instance, Olins (1995: 52) stated that organisations should 'develop a central idea which reveals its personality and a vision which emphasizes its sense of purpose and which helps it to seize the marketing high ground'. Similarly Hooley, et al, (1992: 46) stated that: 'the mission should spell out the competitive positioning'. The suggestion here is that organisational vision statements are not merely derivations of corporate personality but more externally orientated in scope, and are subject to modification according to the position of the organisation in relation to its competitive environment. It remains unclear, however, the effect external positioning has on the choice of expressions in the design of a corporate brand mark. The theoretical debate surrounding the issues of translating different components of organisational strategy into brand marks (and the broader visual manifestations) has been a neglected area of corporate brand identity scholarship; therefore, given the prominence assigned to the broader aspects of brand identity, this area of brand management requires an increase in scholarly attention.

3·8   Summary

This chapter has outlined the scope of the visual manifestations of a corporate brand and has, subsequently, focused on one aspect of the extensive visual manifestations – the brand mark. After providing a definition of what constitutes a brand mark, three figures were provided to illustrate a range of brand marks comprised of either one or two devices, these being a symbol or a logotype, or a combination of both. Irrespective of the combination of devices, the single unit is referred to as a brand mark. While the brand mark is only a small part of a much bigger programme, it is the most efficient means of delivering an organisation's message, and is the focus of this research. Of particular interest is the strategic message underpinning the expressive element of a brand mark.

The visual manifestations of organisational brands, and in particular the brand mark of an organisation, are considered to be a mechanism for 'making strategy visible through design' (Olins, 1989). There are various aspects of organisational strategy that can be expressed, such as core values, vision, mission, philosophy, and personality. In 1984 the Design Council responded to the ambiguity surrounding the process of corporate identity by commissioning Wally Olins to produce *A Guide to Corporate Identity*. In this publication Olins suggested that corporate identity could project four messages: who the organisation is; what the organisation does; how the organisation does what it does; where the organisation wants to be. This chapter therefore used these four suggestions – referred to as pivots – as a structure for exploring the expressions that have underpinned the design of brand marks.

The examination of literature revealed that there was no substantive theoretical debate regarding the construction of these devices. With a range of potential strategic expressions, it remains unclear what influences the choice of strategic expression prioritised in the design of corporate brand marks. Accordingly very little is known regarding the translation of strategy into formal brand mark expressions. In this context there is an apparent need for devising a mechanism that systematically and reliably captures corporate brand expressions, as this would provide a point of departure in generating a theoretical

understanding of what brand mark expressions have been chosen and why. To this end, the subsequent chapter devises a classification tool to capture brand mark expressions and outlines the methods used to conduct empirical research.

4   Research Design: A mixed methods approach

4·1   Introduction

The previous chapter exposed a distinct theoretical gap in the literature concerning the visual manifestations of corporate brand identities. To address this theoretical gap the chapter begins by exploring the underlying research issue and describes the translation of this issue into two research questions. This exposition of the research problem enables the aim of the study to be made explicit. Moreover, the research design cannot be fully judged for its appropriateness without a clear problem statement, as this will act as a guide to the relevant research procedures and as a means for judging its quality (Lincoln and Guba, 1985).

In formalising the research problem choices were made regarding the nature of the enquiry – in terms of the type of data that were gathered and how the data were recorded, interpreted and analysed (Easterby-Smith et al., 2008; Blaikie, 2007). Inevitably these decisions were informed by the personal preferences and the philosophical lens of the researcher. Therefore, as it is considered good practice for researchers to be open about their preferences (Miles and Huberman, 1994), the subsequent section discusses the philosophical paradigm and the intrinsic assumptions underpinning the research design.

Having made the aim of the research and the intrinsic assumptions explicit, attention is subsequently directed towards the construction of the mixed methods research design and its ability to address the research problem. Following this consideration is given to the instrument for capturing the activity, and discusses the procedures involved in the opera-

tionalisation of the conceptual framework and the methods used to establish its reliability as a coding tool. A substantial part of the chapter is dedicated to describing the first of two methods used in this study: the collection and the analysis of archival data. Thereafter the chapter provides a detailed description of the procedures involved in collecting archival data and the subsequent analysis of the data, which consisted of two techniques: content analysis and visual analysis. The chapter is brought to a close with a summary.

4·2   Philosophical paradigm underpinning the study

This enquiry is concerned with how brand identity consultants have conceptualised – through the visual manifestation of design – corporate brand marks as a communicative device. The actors involved in this activity determine the visual expression of these corporate symbols in response to a particular context in which the activity occurs. Accordingly in order to better understand how this activity has been conceptualised it is necessary to study the individuals directly involved in the construction of these symbols. Therefore the study of this activity, argues the researcher, is better situated in the social constructionist paradigm.

This philosophical paradigm, according to several scholars from the field of corporate branding, is considered to be a more appropriate epistemology for studying corporate brand identity than those epistemologies falling within the more realist ontological positions (Hatch and Schultz, 1997; Balmer, 1998, 2001a). It was noted by Balmer (2001a) that, as an area of academic interest, corporate brand identity has been somewhat limited in its exposure to empirical research conducted under the constructionist domain. Whilst academic activity has increased over the past decade, interest within the area of corporate visual manifestations has remained a relatively under-explored domain; as such, qualitative-orientated enquiries are considered more appropriate due to the focus on theory generation (Balmer, 2001a). Furthermore, given that brands are considered to be intangible assets that constitute a collection of thoughts that exist in the minds of stakeholders, the symbols of these intangible assets are not 'real' entities but merely social constructs; it would therefore appear appropriate for them to be examined as such.

In adopting the paradigm of constructionism, however, the investigator intrinsically subscribes to the ontological and epistemological assumptions of this 'worldview' (Patton, 1978. Cited in Lincoln and Guba, 1985: 15). From an ontological perspective, this relativistic posture takes the view that 'realities exist in the form of multiple mental constructions, [which are] socially and experientially based' (Guba, 1990: 27). Within this paradigm the constructionist epistemology considers human knowledge to be the result of individuals making sense of their interactions with the social and physical world (Gray, 2004). Social scientific knowledge, therefore, is considered to be generated by the social scientist as a result of reinterpreting the social world through 'technical language' (Blaikie, 2010: 95). Consequently the research findings are regarded as the outcome of the interaction between the enquirer and the enquired (Guba, 1990: 27).

This position is in sharp contrast to that of the positivist tradition, where the belief is that there is a single reality that 'exists independently of consciousness' (Gray, 2004: 17). Accordingly the epistemological assumption here is that there is a single truth that is identifiable and can be subjected to measurement and study (Guba and Lincoln, 2011: 102). Consequently, as data is thought to exist independently and merely needs to be collected, the positivist axiom considers the relationship between the enquirer and object of enquiry to be independent (Lincoln and Guba, 1985). Research conducted within this paradigm (and related paradigms, such as the critical realist positions) are concerned with 'discovering the objective truth' or, in the case of critical realists, discovering an incomplete, partial view of the objective truth (Denzin and Lincoln, 2011: 100–102).

This investigator–object dualism, however, where the investigator assumes the position of an external observer, was termed the 'objectivist illusion' by Habermas (1972) as it failed to recognise the investigator's 'implicit standpoint' (cited in Blaikie, 2007). This argument raises the point that the investigator does not observe in isolation, but as a member of a social group whose 'experience, knowledge, expectations and language … will influence what is observed' (Blaikie, 2007: 184). Indeed it would seem implausible for a person to be able to detach themselves from their humanity and be able to adopt a position of having no worldview at all, which is the implication that objectivity suggests (Burr, 1995: 152).

Since the process of observation involves the filtering and interpretation of information, observers should be considered as active agents rather than passive recipients (Blaikie, 2007: 184).

Whilst absolute objectivity is considered by constructionists to be unattainable, awareness of inherent researcher biases and the procedures for minimizing its effects are essential for producing credible research. Without a balanced and fair approach to research, investigators cannot expect their findings to be considered trustworthy (Lincoln and Guba, 1985). Given the aim of the enquiry, this research is clearly situated in the constructionist paradigm, and accordingly the research design incorporated four mechanisms for establishing trustworthiness: construct validity through the explication of the conceptual framework; reliability of the measure used to capture the expressions of the cases; data triangulation through the use of multiple credible sources; and finally, methodological triangulation through the use of two methods of analysis: content analysis and visual analysis. These issues, along with a detailed description of the research design are explained in the following sections.

4·3   Research issues and research problem

The research project developed formally from the researcher's interest in acquiring a more informed understanding of how consultants determine what messages should be expressed through a corporate brand mark. The prevalent viewpoint is that a corporate brand identity is a reflection of a corporation's strategy (see chapter 3). However, unlike lengthy corporate manifestos, which have the scope to provide detailed explanations of corporate strategy, a brand mark is an economical unit with a limited means of expression. Paradoxically it is this ability of expressing only the very essence of corporate strategy that can render the corporate symbol with such resonance.

When considering the saliency of corporate symbols it is somewhat surprising that relatively little is known – from a theoretical perspective – regarding the construction of these devices. After examining a high number of case studies it became apparent that

consultants generally adopt a heuristic approach to the decision making process of constructing these corporate symbols. Such an approach could perhaps be a reflection of the intrinsic complexities of corporate brands, as they can differ greatly in terms of their activities, their markets, and their stakeholders. Nevertheless, there comes a point during the consultation process where, upon evaluation of the circumstances and the ambitions of the organisation, the brand consultants inevitably make a recommendation on what the organisation 'should' express through its brand mark. It is this sense-making activity and the ensuing theorizing of this activity that is the interest of this research.

While the root of this enquiry is concerned with what a corporate brand 'should' communicate, such normative statements rarely translate into effective research questions (White, 2008). Therefore, in articulating this problem into a researchable question, the use of a descriptive question provided a useful starting point (Blaikie, 2007; Creswell, 2008; King and Horrick, 2010; Maxwell, 2004; White, 2008). In general agreement with Silverman (2006) and Blaikie (2007) it seemed more logical to articulate the first research question in a way that sought description before progressing to a theoretical research question. However, in direct contrast to Silverman's (2006) specific recommendation of starting with 'how' questions before moving on to 'why' questions, the researcher wanted to avoid the ambiguity of 'how' and 'why' questions by phrasing the research questions in terms that provided a clearer direction to the kind of answer the questions would require and therefore signposting the type of data that needed to be collected (White, 2008).

Accordingly the research questions were articulated in the following manner:
RQ1: What have corporate brand marks visually expressed over time?
RQ2: What explains the selection of these visual expressions and what were the influences?

Organisations operate within a specific context and, as such, branding activity has to be seen as a response to a particular context; indeed much of the activity of corporate branding is driven by a situational change. In order to study what corporate brands have expressed through their visual identities, it was important to consider the context in which the activity occurred. By examining cases from a range of periods the study had the potential to reveal the content of brand mark expression, the changes of brand expression,

and the factors (localised or generalised) that determine brand expression. The first question therefore addresses the underlying research problem by seeking a descriptive account of the activity from a broad sample that incorporates the maximum variation of cases from over different contextual periods and from a variety sectors.

The second question extends the enquiry by seeking explanations for the choice of expressions in the cases. It follows that by understanding the choice of brand mark expressions and the reasons underpinning the choice of expression, and the context in which the activity occurred, it should become apparent how consultants conceptualise the activity in creating these organisational symbols. Knowing how such activity is conceptualised by the actors should enable the development of a theoretical framework of the activity.

Both questions make the intentions of the study explicit and clearly signpost the data that needed to be collected, and, therefore, by answering these questions the research problem could be satisfactorily addressed. In the subsequent section the research design outlines the methods used to address these research questions.

4·4   Research design of the study

The process of formalising the research problem into specific research questions clarified the purpose of the research and compelled the researcher to address the related issues of determining what data needed to be gathered to answer the research questions and what methods would be used to facilitate the capturing of this data (Maxwell, 1996). Since the purpose of the enquiry was to develop a theoretical understanding of the expressions in corporate brand marks, the research questions were written in a form associated with a sequential, mixed methods approach: the first question sought a description, while the second sought explanation.

The first phase of the enquiry consisted of a content analysis and visual analysis of archival data, as a means of identifying the occurrence and frequency of organisational brand expressions. This procedure culminated in the production of a set of descriptive statistics

that captured the range of expressions that had emerged over time. The second phase of the enquiry adopted a qualitative approach, concerned with identifying the explanations for the occurrence of the expressions. This phase of the study involved a thematic analysis of qualitative data generated from interviews with the actors responsible for constructing a selection of theoretically interesting brand expressions – including the outliers. (The methods are discussed in greater detail in subsequent sections.)

Sequential Mixed Methods Enquiry

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┌──────────────────────┐
│  Research Question   │
└──────────┬───────────┘
           │
           ▼
┌──────────────────────┐
│    Archival Data     │
└──────────┬───────────┘
           │
           ▼
┌──────────────────────┐    ┌──────────────────────┐    ┌──────────────────────┐
│ Content/Visual       │───▶│    Emergence of      │───▶│    Interview Data    │
│ Analysis             │    │  Theoretical Issues  │    │                      │
└──────────────────────┘    └──────────────────────┘    └──────────┬───────────┘
                                                                    │
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                                                         ┌──────────────────────┐
                                                         │   Thematic Analysis  │
                                                         └──────────┬───────────┘
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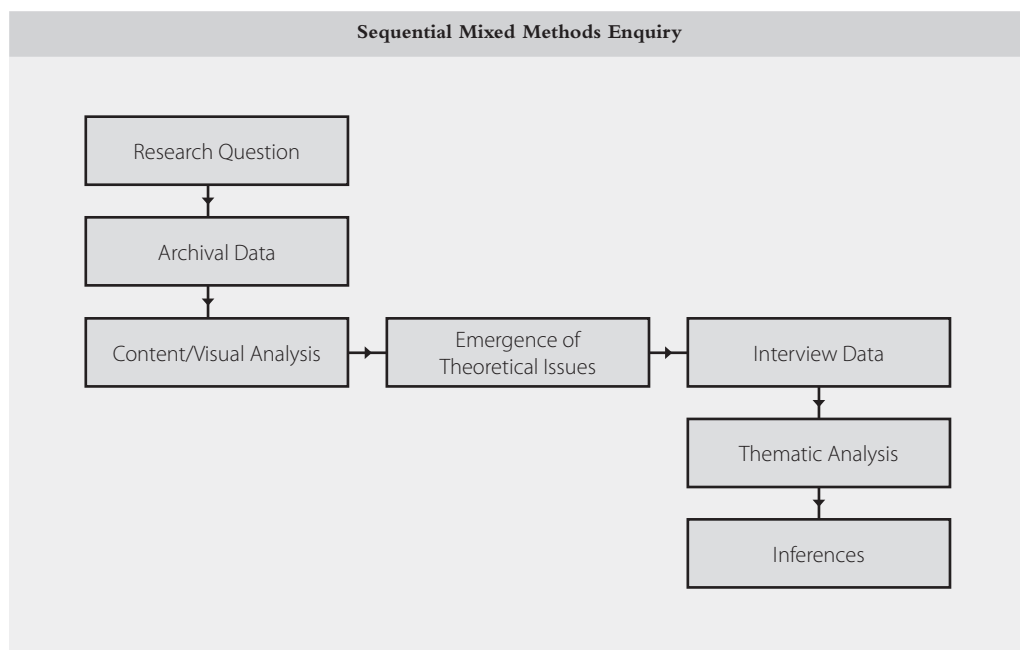
Figure 4·1. Title: Research Design: Sequential Mixed Methods Enquiry.

The findings from the two methods are reported within separate chapters; however the synthesis of findings from both phases is presented in the penultimate section of this thesis (Chapter 8). The uncomplicated structure of the sequential explanatory research design is regarded as a key strength of this approach (Creswell, et al, 2003). Furthermore, Newman, et al (2003) regard mixed methods research designs to be suitable for studying complex phenomena where the intention is to interpret meaning. Indeed the advantage of this research design was that it enabled the researcher to connect secondary historical data with primary qualitative data, and therefore provide a more robust account of the activity. The methods also satisfied the fundamental principle of mixed methods research, by selecting

two methods that had complementary strengths and no overlapping weaknesses (Creswell, et al, 2003). As a means of remaining consistent to this principle the selection of methods were designed to (a) 'corroborate earlier findings,' (b) 'eliminate plausible alternative findings for conclusions drawn from research data,' and (c) 'elucidate the divergent aspects of a phenomenon' (Johnson and Turner, 2003: 299).

The purpose of many sequential explanatory designs is to use qualitative data to 'assist in explaining and interpreting the findings of a primarily quantitative study' (Creswell, et al, 2003: 227). However in this study the qualitative phase was not assigned an assisting role, but one that used the findings of the initial quantitative phase to enable theoretical issues to emerge and, therefore, provide the guidance in purposive sampling (Creswell, et al, 2003: 227). In this design the synthesis of the two analyses would enable the researcher to compare the findings and to draw inferences from the data. Given the interdependency of each method and the comparative nature of the two analyses, both methods were considered equal in priority.

Whilst the research design was constructed to provide satisfactory answers to the research questions and had the aforementioned strengths, it had limitations. An intrinsic weakness of this design was the time consuming data collection procedures involved in the two distinct phases, which is particularly pronounced in designs that consider both phases as being equal in priority (Creswell, et al, 2003). The first phase of the study involved the onerous task of collecting archival data for individual cases from multiple sources, while the second phase involved the typical difficulties of identifying, locating and accessing 'elites' – the actual actors involved in the construction of the symbols in specific cases.

These issues, relating to the difficulties involved in applying the methods, are discussed in detail in the subsequent sections: Method I and Method II. Each section describes the sampling of cases, data collection, data generation and methods of analysis.

4·5   Method I: Sampling, collecting and analysing archival data

In the first phase of the research the intention was to capture the expressions of a sample of organisational brand marks. In order to include the maximum variation of expressions, cases were sought from over a large period of time: from the 1960s – a period when the cases of corporate identity reached critical mass – through to the 2000s. The number of cases sampled from each decade was determined by the decade with the smallest sampling frame, which happened to be the 1970s. This limitation imposed a realistic sample of 20 cases from each of the five decades (N=100).

Nevertheless despite this limitation the sample size provided an acceptable representation of the activity during each time period, and therefore enabled maximum variation of cases to be incorporated into the study (Patton, 1990). As a further means of enabling a wide range of expressions to emerge it was essential that a diverse range of sectors were represented in the sample (although some of the more profitable and high growth sectors that engaged in such activity occurred more frequently, perhaps due to their capacity to invest in such undertakings). Three constraints were imposed upon the sampling design. First, each case had to constitute a corporate brand rather than a product brand. Admittedly whilst the two types of brands are not necessarily mutually exclusive, there are distinct differences, as noted by Balmer and Soenen (1999) and Hatch and Schultz (2001). Secondly the identities had to be monolithic, i.e., visually independent and therefore free of any endorsement by a parent organisation. This criterion enabled a greater clarity of analysis without the unnecessary introduction of additional expressive considerations. The third criterion was that each case must have involved professional design intervention. The assumption here was that by limiting the sample to only those cases that had received design intervention by specialist brand consultancies – as opposed to interventions from general graphic design agencies, in-house departments or non-professional individuals – the work could be considered as representative of best practice. These criteria imposed a filtering system that resulted in the most relevant sample of cases that had a better ability to provide indicative answers to the research question (Krippendorf, 2004).

For the cases that satisfied these criteria archival data were gathered from three sources: graphic design literature, brand consultancy literature, and third-party [online] resources. First, a trawl through the graphic design and corporate identity literature enabled the author to identify potential cases for the study, and assemble the names of prominent graphic designers with expertise in the specialism. This presented the opportunity to conduct further online searches using the names of designers and the names of organisations, along with generic activity terms such as 'corporate identity'. This process was subsequently repeated through the six established leading brand consultancies' websites: Brand Union, FutureBrand, Interbrand, Landor Associates, Lippincott and Wolff Olins. (Many of the aforementioned consultancies have themselves undergone nomenclature changes over the previous decades, as a result of structural reorganisation.)

Search Terms	Information	Databases
"Corporate Identity"	Case studies	Google
"Brand Identity"	Publications	LexisNexis
"Brand logos"	Press advertisements	ProQuest ABI Global
"designer x" + "client x"	Web-based materials	EBSCO Business Source Premier
"consultancy x" + "client x"	Press releases	
	Newspaper articles	

Table 4·1. Title: Search terms used in the study.

In cases with insufficient supporting information (where the information lacked explicit reference to the specific intention of the design expression) further searches were conducted on LexisNexis, with the aim of finding press releases – around the period of activity – that might contain direct quotes from any of the active parties. Accordingly the search strings contained the name of the designer – or consultancy – and the name of the organisation that had undergone the branding activity. For instance, the search for material relating to the case of Fortis, consisted of the following terms and operator: "Fortis" AND "Landor Associates". The result of this particular search helped to locate a useful article published in Business Wire (1998) that discussed the case and contained direct quotes from both the client and the consultancy. Articles such as the Fortis case became very important discoveries that enabled the author to triangulate data from multiple

sources, which provided an additional means of verification (Lincoln and Guba, 1985). Additional sources of case information were sought by conducting online searches using the names of both the consultancy and the client, along with an activity word on the Lex-isNexis and Google databases (Table 4·1 provides a list of the key terms used in the search to identify cases). In addition to these specific searches, a general search was conducted using generic activity terms with the aim of identifying third-party sites that offered im-partial information on corporate brand identity activity.
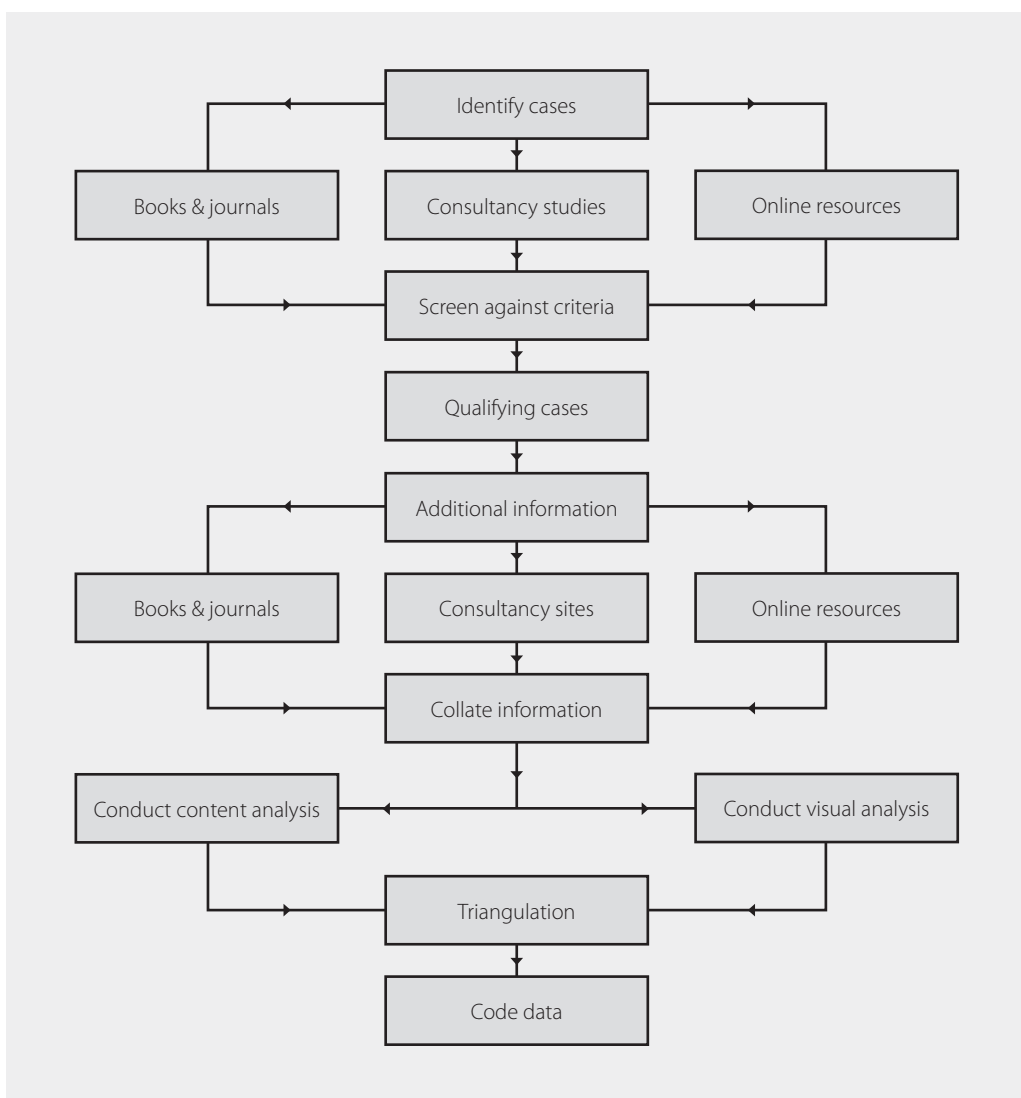
Figure 4·2. Title: Stage one research process flowchart.

In 86 per cent of the cases suitable explanatory material was found, where the actors (designers and consultants responsible for the construction of the symbols) provided explicit explanation of their intentions, such as direct quotes in press releases. As such, the resulting material, which encompassed collected papers, case studies and press releases for each of the 86 cases, was subsequently subjected to a content analysis in order to determine the intended expressions underpinning the brand marks. Given the intentions of the study the unit of analysis extended beyond singular words as these alone would not reveal sufficient clarity of meaning. Whilst a list of reoccurring keywords were used to signify thematic proximity, it was imperative for the unit of analysis to include the context of the keywords, as these larger semantic units, such as clauses and sentences, better enabled a more accurate interpretation (Bliss, Monk, and Ogborn, 1983, cited in Miles and Huberman, 1994). The most revealing and meaningful semantic units were highlighted and coded in accordance with the tentative conceptual framework (explained in section 4·6). A table of thematic indicators and their corresponding pivot, along with an example of the usage is provided in Table 4·2.

The objective of the content analysis, in addition to establishing the intentions of the design expression, was to identify the presence of the four pivots from the conceptual framework. In the following extract of text from the case of 3M (1961) the relevant text that revealed the presence of the 'who' pivot is highlighted. This extract provides a clear indication that a key driver of the visual identity was the lack of a unified appearance [visual inconsistency] and that the solution was the consistent application of the new visual identificational system, as directed by the identity manual.

'As the number of 3M divisions and products multiplied, so did the number of logo and packaging variations. While the goal was to create a specialized family appearance for all of the divisions' products, the corporation didn't have a unified look … each division was allowed to have its own distinctive symbol, but this undermined the visual continuity 3M was seeking. The new logo design came with an identification system manual showing proper use of the symbol and overall graphics system.'
Source: 3M.com

Pivot	Extracts from cases	Keywords and key constructs
Who	'The idea of the red O came about partly to reinforce a design concept to use circular canopies, pumps, and display elements for a <u>distinctive</u> and <u>attractive</u> look. It also served to help people <u>pronounce the name correctly</u> (Mo-bil, not Mo-bile), and, of course, to add a single <u>memorable and distinctive element</u> to an otherwise very simple lettering style.'	Descriptions are informed by functional attributes, such as the following keywords: Identificational Attractive Memorable Aid pronunciation Consistency Uniform Recognisable
What	'Rand's challenge was to transform the shield into a modern image. He streamlined the contours, introduced balanced gothic lower case letters, <u>and placed an outline of a package with a bow on the top of the shield as sort of a crown.</u>' 'The new identity conveys BT's focus, <u>the human communications business,</u> with a symbol that can be understood cross national borders.'	Explicit references to the visual manifestations literally – or metaphorically – signifying core organisational activities. Definition becoming less specific: from the category of 'telecommunications' to a higher substantive category of 'human communications'.
How	<u>'Our new identity is a symbol for all that is best in customer service. The ideas of service, fidelity and promptness suggested the notion of a dog retrieving a ball …'</u> <u>'The new identity needed to express the EIB's values</u> and proactive approach to economic and monetary union …' 'Embedded within the primary design is an arrow, <u>symbolizing the company's speed and efficiency.</u>'	Explicit references to the 'way' an organisation operates. Emphasis is directed towards descriptions of performance indicators. Keywords include: Values (core) Differentiation Point-of-difference
Where	<u>The globe, of course, is a commonplace among logotypes these days when every corporation aspires to be a "global corporation".</u>' <u>'The final design symbolized the American landscape – woven from our diverse heritage … The symbol was both American flag and arrow to the future.'</u>	Explicit references to the visual expression of generic or specific aspirations. Keywords include vision, mission, global and future. Explicit references to right-facing devices as an indication of a future-focused organisation.

Table 4·2. Title: Semantic units and corresponding pivots.

In the second extract from the case of Erco (below) the relevant text that revealed the presence of the 'what' pivot is highlighted. This extract provides a clear indication that the identity visually encapsulates the core activity of the company 'light' which corresponds with the 'what' pivot.

'With the help of Otl Aitcher, <u>a new trademark for Erco was created: four capital letters with Univers</u> <u>*type going from dark to light. This design visually encapsulates Maack's endeavour to have a com-*</u> <u>*pany not selling light fittings anymore, but "light" … '*</u>
Source: Staal, 1990.

In a third extract from the case of Telefónica the relevant text responsible for revealing the presence of the 'how' pivot is highlighted. This extract provides a clear indication that the design intention of the identity was to visually express the values of the organization as a means of differentiating the organization, and that visual references to the operational/ categorical activities were avoided. Accordingly, this text corresponded with the indicators of the 'how' pivot.

<u>*'During this process, we determined that the values of "closeness" and "commitment" distinguish and*</u> <u>*differentiate it from its competitors. The new brand illustrates the new approach visually by moving*</u> <u>*away from references to technology and stressing the corporation's human aspects and its ability to*</u> <u>*bring clients the products and services that enrich their quality of life.'*</u>
Source: FutureBrand.com

In a fourth extract from the case of Xerox (1994) the relevant text responsible for revealing the presence of the 'where' pivot is highlighted. This extract provides a clear indication that the design intention of the identity was to visually express the specific aspiration of the organization: 'a digital future'. Accordingly, this text corresponded with the indicators of the 'where' pivot.

<u>*'Now look closely at the big letter "X" … It [the stroke] begins well enough at the bottom left … but*</u> <u>*then as we move upwards and rightwards the letter disintegrates into computer pixels. A rising feature*</u> <u>*traditionally symbolizes optimism, while the move to the right, in the direction of western reading,*</u> <u>*indicates the shift from the present to the future. So, it seems that, for Xerox, "the future is digital".'*</u>
Source: Marquesman, Graphics International.

Whilst part of the aim was to identify the manifestations of the four pivots from the conceptual framework, it was also crucial to allow additional points of theoretical interest to emerge: the potential occurrence of outliers which the conceptual framework could not accommodate. In a fifth extract from the case of Unilever the relevant text that revealed the intentions of the brand mark expression is highlighted below. This extract provides an explicit indication that the design intention of the identity was to visually express the concept of 'vitality', which is neither a reference to organisational activities, nor an expression of organisational performance or organisational values. As such, this deviant case could not be accommodated by the conceptual framework, and, therefore, was coded as 'other'.

' … *helped Unilever change, from an invisible owner of brands to a much more visible business, leading its brands through a single idea: 'adding vitality to life'. We created a visual identity that expresses 'vitality' and that is starting to appear on every Unilever product. Under this banner, we also worked on dozens of projects to put vitality at the heart of the organisation …'*
Source: Wolff Olins.com

In the 14 cases where no direct explanatory material was identified, third party interpretations were sought from professional, credible design forums, an example being Identityworks.com, which is written by a former consultant with Lippincott Margulies. Alongside the content analysis each case was subjected to a visual analysis, which fulfilled two purposes. First, this procedure provided a different approach to data generation and therefore a means of data triangulation, which enabled plausible, alternative explanations to be examined alongside the direct explanations gained from the content analysis (Lincoln and Guba, 1985). Secondly, whilst the author had established considerable sensitivity in the subject, the comparison of explanations alongside the visual analyses served as a useful heuristic mechanism for refining the recognition of the underlying grammar of the visual identities. Accordingly, this process of continuous refinement facilitated the operational effectiveness of the coding scheme and, thus, the conceptual framework.

The triangulation of these two analyses enabled the author to identify which of the intended expressions could be considered independent, as opposed to being reliant on the meaning to be established through additional marketing communications. In other words, a number of brand marks operated as empty vessels: arbitrary marks in which the meaning had to be transmitted initially through other mechanisms, such as marketing communications or brand experiences. Additionally this comparative process between the intended expression(s) and the interpreted expression(s) encouraged the author to adopt a critical perspective of the plausibility of the brand marks as vehicles of visual communication. Furthermore, by examining contrastive viewpoints, whereby the aim was to identify a negotiated expression, this process better reflected the sender–recipient transmission model of communication, where the communication of meaning requires both an initiator and a receiver, neither of which 'has a monopoly on the meaning that passes between them' (Dey, 1993: 35).

Primary verbal and visual manifestations	
Devices & Attributes	*Classifications*
Nomenclature	Arbitrary • Descriptive • Origin • Ownership • Suggestive
Logotype	Formal • Informal • Modern • Period • Stylised
Symbol	Creature • Geometric • Heraldic • Monogrammatic • Organic
Secondary components within the visual manifestations	
Devices & Attributes	*Classifications*
Colour	Analogous • Complimentary • Monochromatic • Triadic
Vernacular	Photographic • Illustrative • Linear • Solid • Patterned • Gradient • Irregular
Orientation	Alignment • Direction • Hierarchy

Table 4·3. Title: Primary and secondary devices and major signifiers.

With similarity to the content analysis, the visual analysis was informed by the four pivots conceptual framework. However, whereas the former analysis sought to identify verbal units that corresponded to the conceptual framework, the visual analysis was intended to identify the correspondence of visual elements to the conceptual framework. This procedure involved separating the constituent parts of each brand mark into two domains: the

primary devices, consisting of the verbal unit (nomenclature) and the visual unit (logo-type and/or symbol); and the secondary devices, consisting of the following graphical attributes: the colour scheme, the graphic vernacular (stylisation of the visual components), and the orientation of the graphical components. Table 4·3 provides a summary of the primary and secondary devices and the subordinate categories of attributes.

The primary devices consisted of the units of the visual system that were independent, while the secondary components consisted of attributes that were dependent on the primary devices. For instance, the application of colour within a brand mark is bound by shape, therefore colour functions as a rendering of a particular shape. Similarly, the attribute of composition – as an expressive graphical feature – is dependent upon the arrangement of separate visual devices in order to become an expressive feature.

Levels of signification	
First Level	Denotation is the literal, obvious meaning of a sign. At this level the sign is not dependent on cultural values for its depiction to be recognisable.
Second Level	Connotation is the interpretation of a sign that is determined by the cultural framework of an audience. Connotation is the meanings that occur when denotation interacts with the dominant cultural values associated with the sign and the attitudes, feelings and emotions of the audience.

Table 4·4. Title: Levels of signification. Adapted from Emmison and Smith, 2007.

For each primary and secondary device there were two levels of signification: denotation and connotation. At the denotational level the meaning of a sign is considered to be literal and not dependent on cultural values for the depiction to be recognized and understood (Emmison and Smith, 2007). At the connotational level a sign is believed to suggest ideas and feelings, in addition to its literal meaning; accordingly, the interpretation of a sign is determined by the cultural framework of an audience (Emmison and Smith, 2007). Using these two levels of signification, each component of the brand marks was subjected to a systematic analysis of the communicative elements.

The visual analysis of each case was recorded on two preformatted sheets, each of which contained a table of details relating to the case, such as the designer or consultancy responsible for the design intervention, the year of origin, the driver of the identity activity, and the intended audience(s) of the activity. The first sheet was used to conduct the visual analysis of the brand mark, which contained clear designated areas for commenting on the primary and secondary devices at the denotational and connotational level of signification. The second recording sheet had an exact duplication of the brand mark printed at the top of the sheet, and therefore was used in conjunction with the first sheet. However, the second sheet was used to mark the presence of the four pivots – and any other communicative strategies. In addition to providing a visual representation of the brand mark, the remaining area of the page was divided into five sections, one section for each of the four pivots and the one remaining section for the 'other' category. Each of these five sections contained a small box situated inside a larger box: the smaller box could accommodate a tick to register the presence of a pivot; the larger box was a designated space for explanations of pivot interpretations – specific mechanisms deemed to signify the presence of a pivot. (A copy of the coding scheme can be found in Appendix I.)

Figure 4·3. Title: AstraZeneca brand mark.

Whilst the subsequent section (4·4) provides additional transparency of the analysis, through the description of the coding scheme, an example of a visual analysis of the AstraZeneca case is provided to further illuminate the process. This case was the result of a merger between two pharmaceutical organisations, and therefore the verbal unit

was formed from the compound of the former organisational nomenclature 'Astra AB' and 'Zeneca Group' resulting in AstraZeneca. Beyond the denotational level, and keeping aside the cultural connotations of the name of a similarly named vehicle, the closest joint associations of the nomenclature were the constructs of 'astral' and 'zenith' both of which hint at aspirational ambitions and goal achievement. These interpretations, however plausible, are subtle and cannot be assumed.

Leaving aside the primary verbal unit, it is apparent that the primary visual unit consisted of a logotype and a symbol. Here the logotype uses a typeface derived from a neo-grotesque sans serif face, comparable to Helvetica. The characteristics of such a typeface are typified by the regularity of the letter stroke, the uniformity of the letter widths, and the abrupt termination of the finial strokes. Neo-grotesque typefaces have the ability to express notions of economy, modernity and European origin. However, in the case of AstraZeneca, the weight of the face, combined with the orange and purple colours, and the tight range kerning (the spacing of the individual letters within the word) appear to be noncommittal in terms of the reinforcement of the brand concept. Moreover, the ubiquity of this class of typeface, in a corporate context, has resulted in such typefaces being seen as modernistic but generic in their expression (Blackwell, 1998; Bringhurst, 2004).

With attention turned to the symbol, the denotational level of the symbol is that of a signifier of the merging organisations expressed through the representation of the two initials 'A' and 'Z'. At the denotational level the symbol is indicative of the molecular model of a DNA spiral. This symbol, therefore, has clear connotations of scientific research, thereby conveying the generic organisational activities. Furthermore, the initials 'A' and 'Z' has a connotation of 'A to Z' and therefore is suggestive of an array of activities. Subsequently, the 'who' and the 'what' pivots were acknowledged as being present. In terms of colour, the orange-gold hue has connotations of excellence, however this signifier lacked any additional visual reinforcement to substantiate the interpretation. Nevertheless, clarification of this interpretation was achieved through the comparison of the visual analysis with the content analysis of the archival data, where the consultancy explanation revealed an explicit reference to the intention of the design 'to reflect the characteristics of our company and, in particular, our commitment to innovation, quality and excellence'.
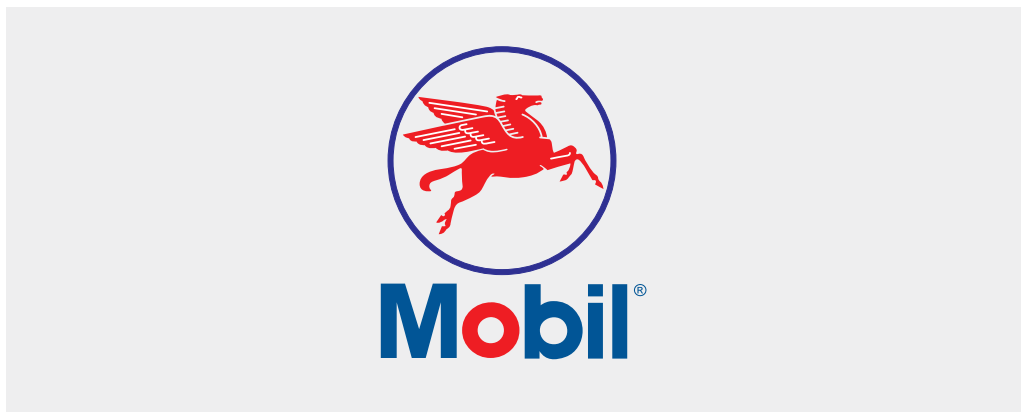
Figure 4·4. Title: Mobil brand mark.

In the majority of the cases the content analysis corresponded with the interpretations of the visual analysis; however, the case of Mobil provided a notable exception. The findings of the content analysis from the consultancy case study of Mobil conflicted with the findings from the visual analysis of the same case, and therefore affected the initial coding of the case. After conducting the visual analysis, the case was interpreted – and coded – as expressing a benefit of the organisation's core product: movement and mobility. Additionally, the combination of the name Mobil with the contrasting colour of the wheel-like red letter 'o', which sat alongside the symbol of the Pegasus – a creature that had ground and air movement capability – served to reinforce the interpretation of motion. However, whilst this interpretation appeared plausible, the content analysis of the consultancy case stated that the red letter 'o' was merely an arbitrary graphic device based on a distinctive feature of a filling station pump. From the former interpretation the case was coded as expressing a benefit of organisational activities, whereas the consultancy explanation stated otherwise. Therefore the coding of this particular case was modified to reflect the brand consultancy's intentions of the design.

As the Mobil case illustrated, the comparison of the visual analysis with the content analysis enabled a greater accuracy in the codification of the cases. A related procedure was conducted for the 14 cases lacking in supporting information; here the interpretations from the visual analysis were triangulated through the use of third party interpretations gathered from credible corporate identity websites, such as Identityworks.com. This web-

site, which is run by the former Lippincott & Margulies consultant, Tony Spaeth, features rich interpretations of corporate brand identity programmes. The strategy of collecting and generating information 'using a variety of sources and methods … reduces the risk' of forming conclusions that reflect 'systematic biases or limitations of a specific source or method' and facilitates a 'more secure understanding of the issues' under investigation (Maxwell, 2004: 93–94).

With the two analyses complete the results were entered into a spreadsheet programme. The details of each case, such as the date, the driver of activity, the name and the industry of the organisation, the consultancy (or designer) responsible for the design intervention, the presence of pivots, and the devices used to express the pivots, were recorded within a single document. From this document the data could be grouped according to specific features, and the frequencies of specific features could be easily extracted and visually displayed on additional worksheets.

4·6   Operationalising the conceptual framework: The coding scheme

Before conducting the analysis of data a coding scheme was developed as an extension of the prior conceptual framework, as recommended by Miles and Huberman (1994). However the introduction of preconceived ideas to the analysis, according to Glaser and Strauss (1967), can potentially constrain the researcher's perspective to only view the data through a predetermined model, and therefore hinder the natural emergence of theory. Nevertheless the author's view is that prior knowledge is not a hindrance but a useful framework for the analysis, providing that the process remains inductive and that any irregularities are allowed to emerge from the data; Dey refers to this as 'not confusing an empty head with an open mind' (1993: 229). Additionally, the author shares the notion that theory is not a fixed arrangement of concepts but an evolving and adaptable relationship of concepts, and, as such, 'new evidence rarely overthrows original theory – instead it shows how to adapt and modify it to take the new evidence into account' (Dey, 1999: 30–31). Furthermore, given the conceptual framework's origins in empirical observation

and the absence of any explanation, the four pivots framework – in its original state – was not a predetermined filter for the results but merely a conceptual tool that has since been systematically explicated into an analytical tool.

The conceptual framework consisted of four categories that, according to Olins (1995: 3), encompassed the expressions that a corporate identity could communicate: 'who you are; what you do; how you do what you do; and where you are heading' (the use of the second-person in this sense, refers to an organisation). Whilst Olins was an experienced practitioner – and indeed one of the leaders in his field – these empirically informed observations lacked specificity and robust categorical definition. Olins's framing of the corporate identity situation, however, was sufficiently divergent to provide a foundation from which to explicate these constructs and form explicit, meaningful definitions and specific indicators, which according to Glaser's concept-indicator model (Glaser, 1978, cited in Locke, 2001) provides the linkage connecting concept with data.

Pivot	Conceptual expressions
Who you are	Identification • Origin • Ownership
What you do	Category of operations • Signifier of core activity
How you do it	Point of difference/differentiation • Expression of core values
Where you are heading	Expression of a vision/mission

Table 4·5. Title: Summary of the key points in the explication of the four pivots.

As previously suggested, by using a prior framework there was an intrinsic risk of 'forcing the data to fit' the model (Charmaz, 2006: 49), therefore to mitigate this risk a fifth category was incorporated into the framework. This new category, simply labelled 'other,' was a necessary mechanism to account for any cases that contained expressions that could not be accommodated by the boundary conditions of the four original categories. Since this 'other' category was a device for capturing any nonstandard expressions in the sample of cases, it did not need any description of boundary conditions. By contrast, the four primary categories needed a sufficiently detailed description of the boundary conditions

to ensure that the coding scheme accounted for every conceivable expressive indicator. An overview of the explicated conceptual framework, including construct definitions, boundary conditions and exemplars are provided in Tables 4·5, 4·6, 4·7, 4·8 and 4·9.

Boundary conditions for pivot one: 'Who'

All visual identities visually represent a particular organisation, and thus operate as identificational devices. Within a visual identity there are two mechanisms that fulfil this function: (i) the organisational name and (ii) the organisational brand mark. All organisational names, regardless of their emphasis, identifies 'who' an organisation is; similarly, the visual manifestations of such names – logotypes – and brand marks communicate 'who' the organisation is (irrespective of the clarity of message). As an example, the Nike Swoosh is an abstract symbol that represents – or stands for – the Nike organisation. Clearly such abstract marks depend upon prior association with a given organisation for the communication to be effective. Nevertheless such devices, by default, function as tools of representation and identification.

Coding classifications	
Olins' Four Pivots	*Exemplars*
Who	

Coding descriptions	
Olins' Four Pivots	*Boundary conditions*
Who	All visual identities signify an organisation. At a basic funtional level, a visual identity is an identificational tool. Therefore 'who' is a default category and applies to all identities. In addition to the basic function of identification, this pivot can suggest either ownership and/or origin through the use of place names and/or family names.

Table 4·6. Title: Operationalised constructs for the 'who' pivot.

Whilst the 'who' pivot is intrinsically functional, there can be instances where there is a sense of greater revelation in this attribute. Organisational names derived from surnames, such as the founders Max Braun and Henri Nestlé, offer a sense of ownership and, therefore, pride through the use of their owners' surnames. Similarly, names that are inspired by their source of origin, such as Deutsche Bank, also reveal a sense of the nationality and the cultural of the people behind the organisation, and, by association, some of the stereotypical values inherently linked to such nationalities. By contrast, seemingly arbitrary names, such as Exxon, by their very nature lack the capability to reveal any personal or cultural dimension of an organisation.

The associations derived from personal and place names can be similarly expressed in a graphically equivalent way through the use of heraldic devices, such as coats of arms and crests. These devices can express, through the coded grammar of heraldry, attributes of origin and ownership. Indeed origin-orientated heraldic devices can be seen in numerous visual identities of public-sector organisations, such as local councils and traditional universities; however, they are predominantly the domain of royalty and members of nobility (Von Volborth, 1973). Therefore, given heraldry's capacity to evoke connotations of status, the use of such devices has the potential to suggest a level of service or an expectation of experience that could register as a 'how' pivot, in addition to a 'who' pivot.

Fundamentally, the 'who' pivot is a classification for the functional attribute of a visual brand identity: a visual signifier that serves to identify an organisation, with the potential to communicate either ownership or origin. However, since all visual identities satisfy this rudimentary purpose, the limitations of this pivot are that it is simply an identificational tool that provides no means with which to discriminate between cases. Therefore the 'who' pivot can be considered the least strategic of the four pivots in the framework.

Boundary conditions for pivot two: 'What'

According to Wally Olins (1995: 3), one of the four pivots that an identity can express is 'what you do'. The 'what' pivot refers to the element(s) within a visual identity that provides a reference to the core activity or the principal industry of an organisation. There are four mechanisms within a visual identity (disregarding any additional devices such as

strap-lines) that can express this pivot. The most explicit means of expressing the 'what' pivot is through the use of a descriptive name, such as British Airways, where the name contains a word that clearly states the area of activity. A less explicit means of expressing the 'what' pivot is through the use of a suggestive name, such as Bell (the American telecommunications company). From a visual perspective the 'what' pivot can be made explicit through the use of a literal symbol, such as the pylon symbol in the visual identity for the National Grid. A less explicit means of expressing this pivot is through the use of a visual device that is associated with a particular category of operations. An example of this is the cross in the name Smith + Nephew, which functions as an ampersand and as a generic signifier of healthcare. Similarly, an arrow symbol registers as visual shorthand for the transportation industry (FedEx and British Rail are two examples).

Coding classifications	
Olins' Four Pivots	*Exemplars*
What	

Coding descriptions	
Olins' Four Pivots	*Boundary conditions*
What	This category refers to visual identities that communicate, either through explicit description or subtle suggestion, the industry of operations or activity of the organisation. The reference, however, has to be explicit, without the need for prior, specific knowledge of the organisation in question. The following types of visual identities are classified in this category: • Descriptive names such as British Airways are classified as 'what' • Recognisable symbols associated with the category of operations, such as the cross in the identity for Bayer, which relates to health care • Graphical devices that either illustrate or indicate 'what' the organisation do; an example being the use of theatrical masks to inform the crossbars of the letter As for Almeida.

Table 4·7. Title: Operationalised constructs for the 'what' pivot.

Boundary conditions for pivot two: 'How'

The third pivot encompasses the features within a brand identity that express the notion of 'how you do what you do' (Olins, 1995: 3). This pivot reflects an organisational attempt to distinguish itself from its competitors by presenting a distinctive point of difference. In the expression of this pivot, three types of devices typically occur. First, there is the use of suggestive nomenclature, such as First Direct, an online bank. In this example, there is no suggestion of banking (what they do) but a suggestion of 'how' the organisation provides an operational point of difference. Second there is the use of an indicative symbol, such as the Klöckner dog: the symbol of the dog carrying a ball in its mouth is intended to symbolise an energetic willingness to respond to customer requests. The third method is through the use of subtle graphical characteristics, such as typography. Typically this third method involves expressing a corporate personality, along with a set of core values and a tone-of-voice. A vivid example of this pivot would be the visual identity for Cearns & Brown, where the icons of food with illustrative legs (or wings) not only make reference to 'what' they do (food distribution) but express an inherent sense of humour (i.e., personality) in 'how' they present themselves. (See figure 6·7.)

Of the four pivots, the 'how' pivot is the most subjective. The concepts of personality and values are typically encoded within subjective signifiers, such as colour. The lack of a standardised grammar of colour leads to difficulty in reliably interpreting the meaning of colour, which has been acknowledged by Kress and Leeuwen (2002). For instance, the colour blue is seen as trustworthy, dependable, committed, sedate, and serene; and it is a spiritual colour that invokes rest. Furthermore, a brilliant blue 'becomes dynamic and dramatic' (Smith, 2010). 'In Mexico, it is the colour of mourning;' whereas 'in Aztec culture, blue is the symbolic colour of sacrifice' (Smith, 2010). However, since blue has multiple meanings, the interpretation of the colour has to be informed, and therefore dependent, on the context of the colour.

Furthermore, as Kress and Leeuwen (2002: 353) have identified: 'colours are determined by several factors, of which hue might not even be the most important one'. Additional considerations are the *saturation* of a hue, also known as the chroma, and the *value* of a hue (the amount of white or black in the hue) both of which have expressive qualities. An ad-

ditional complexity is that, beyond the basic connotations of individual primary, second-ary and tertiary colours, an individual colour is predominantly seen in combination with other colours, even when only on a white background. Therefore, an individual colour is rarely seen in isolation but as a combination of colours, in a combination of proportions of different colours (Itten, 2001).

Coding classifications	
Olins' Four Pivots	*Exemplars*
How	

Coding descriptions	
Olins' Four Pivots	*Boundary conditions*
How	This category refers to the way in which a company go about their business – 'how' they do what they do. In many instances, these messages are stated as core values or differentiation. Further, all typefaces – and therefore logotypes – have intrinsic communicative values so could be considered as markers for attitude; indeed, colour has associative values. However, this pivot can only be acknowledged if the meaning is clearly apparent, with an acceptable level of explicitness. The following types of visual identities are classified in this category: • Suggestive names that focus on communicating comparative positions, including operational advantages and/or superior service. An example would be First Direct; • Suggestive symbols that focus on communicating comparative positions, including operational advantages and/or superior service. An example would be the crown symbol in the Hallmark identity. • Graphical attributes and/or devices to communicate differentiation, core values, or an attitude. An example would be the flamboyant letter-style of the Saks identity, or the 'personal' touch in the handwritten typestyle of the Hallmark logotype.

Table 4·8. Title: Operationalised constructs for the 'how' pivot.

The contextual complexities involved in the accurate interpretation of colour has led oth-er studies of visual brand identity to disregard the use of colour because of the inherent difficulties in interpreting this phenomenon (Thurlow and Aiello, 2007). Despite these

acknowledged complexities, colour is a major component in the visual manifestation of a brand identity, and, for this reason, was included in the analysis of the brand marks in this study. Nevertheless, a rule was introduced in the analysis to help overcome the degrees of subtlety, which was based on the concept of 'reinforcement'. This procedure, which was applied to all subjective elements, such as shape, letterforms and colour, was concerned with the reinforcement of a concept through more than one attribute. In other words, an assumption was made regarding the certainty of expression: if a concept was considered a highly important expression for a given brand identity, then clarity of expression would prevail over ambiguity. Moreover, the visual reinforcement of a concept better ensures the certainty of accurate interpretation of a concept. In contrast, an opposing assumption was made regarding any visual ambiguities: if a concept was visually ambiguous, and therefore not reinforced, this would be interpreted as being a concept that was not considered a prioritised aspect of the brand expression.

Boundary conditions for pivot four: 'Where'

The 'where' pivot, according to Olins (1995: 3), refers to any attribute of an identity that expresses 'where you are going'. This pivot accounts for the visual signifiers of an organisation's identity that expresses its vision or mission. There are two methods typically used to convey this pivot: either a generic graphical suggestion of a future aspiration or a more specific indication of a desirable goal. An uncommon means of generically suggesting the future is through the organisational name, an example being the brand consultancy FutureBrand. By far the most common method of signifying a future-focused organisation is to use a right-facing or right-situated graphic device, such as the hidden right-hand arrow within Reckitt Benckiser's logotype (see Table 4·9 overleaf). In the western hemisphere we read from left to right, therefore any elements positioned to the right, from a semiotic perspective, are seen as signifiers of the future.

Similarly, the use of a graphic device that is upward-facing is a generic mechanism for signifying ambition. Specific future indicators, by comparison, are less common than generic devices, perhaps because of the intrinsic difficulty of striving to be simultaneously specific and graphically economical. An example of a visual identity that falls into this category would be BP's Helios symbol, which is stated to be an expression of the goal of

moving 'beyond petroleum' to a cleaner energy source. Xerox (1994) is another example of specific vision-orientated device that used a pixelated graphic treatment to convey the organisation's transition from analogue to digital during the mid 1990s.

Coding classifications	
Olins' Four Pivots	*Exemplars*
Where	

Coding descriptions	
Olins' Four Pivots	*Boundary conditions*
Where	This category refers to the vision or aspiration of the organisation – 'where' they are heading. In the majority of instances, these messages are unspecific and merely generic visual references to the future. The following types of visual identities are classified in this category: • Suggestive names that focus on communicating the future direction or aspirations of the organisation. An example would be the consultancy name, FutureBrand • Suggestive symbols that communicate a more specific future direction or aspiration. An example would be the Helios symbol of BP, as an aspiration to move 'beyond petroleum'. • Generic graphical devices to communicate the future direction of the organisation, such as devices facing, moving or situated to the right (indicative of the future). An example would be the right-facing eagle motif in the Eagle Star identity; or the right-facing arrow in Reckitt Benckiser

Table 4·9. Title: Operationalised constructs for the 'where' pivot.

4·7 Reliability of the coding scheme

Having developed a set of detailed definitions of the conceptual framework, the next procedure was to test the framework's descriptions to establish whether the tool was sufficiently robust as an effective and reliable coding tool (Krippendorff, 2004). A measure of

inter-coder reliability was conducted with the help of a colleague from the School of Design in the University of Leeds, UK; it was imperative, given the subtleties of design, for the coding test to be conducted by a design-qualified agent. All 100 cases were divided into five face-down stacks, with each stack consisting of the 20 cases from each decade. The second coder was asked to select five cases from each of the five stacks, compiling a total of 25 cases. Before the commencement of coding the author provided a brief introduction to the boundary descriptions, along with a set of additional examples to aid the coding process (see Appendix I). In following best practice the examples used to illustrate the coding scheme consisted of cases from outside of the study, so as to preserve objectivity (Neuendorf, 2002). After a brief description of the task, and once the second coder felt comfortable with the task, the coding process began.

The extent of agreement between coders

			PRESENT	VACANT	TOTAL	
ACTUAL			SECOND CODER			
		PRESENT	42.00	6.00	48	
CODER PI	VACANT		1.00	51.00	52	
	TOTAL		43.00	57.00	100	
EXPECTED			SECOND CODER			
		PRESENT	20.64	27.36	48	
CODER PI	PRESENT		20.64	27.36	48	
	VACANT		22.36	29.64	52	
	TOTAL		43.00	57.00	100	
		EXPECTED				
ACTUAL	93.00		50.28	42.72		
CODES	100		50.28	49.72		
		KAPPA	**0.86**			

Table 4·10. Title: The extent of agreement between coders.

Upon completion of the task the two sets of coding results were analysed in order to determine the reliability of the coding scheme. In terms of the level of agreement between the two coders, the reliability showed to be 0·93 in percentage agreement. However, a

simple percentage agreement did not account for the probability of chance-agreement. Therefore, a further measure was conducted using Cohen's kappa coefficient, which takes into account the chance occurrence of agreement. The result was a Kappa of 0·86. Nevertheless, whilst any Kappa result above 0·80 is deemed a highly reliable (Krippendorff, 2004; Neuendorf, 2002), the inter-coder test highlighted some necessary minor amendments to the descriptions of the conceptual framework. It became apparent that the 'how' pivot needed greater clarification in the coding of logotypes, as the subtle nuances of corporate typefaces have inherent personalities. The chosen method for addressing this issue, as previously discussed on the issue of colour, was to apply the principle of reinforcement: identifying the augmentation of a given concept in adjacent visual mechanisms.

4·8   Method II: The sampling, generation and analysis of interview data

Following the analysis of archival data from the first phase of the research there was an emergence of a number of theoretical issues that informed the second phase of the study. Accordingly, the sampling for the second phase of the research was driven by the need to include participants who had direct knowledge of the issues relating to each case. The targeted participants, therefore, were selected according to their involvement in the specific cases of theoretical interest, and, as such, were able to provide excellent data (Morse, 2007). More specifically, the theoretical points of interest were located around two issues: first, there was an emergence of deviant cases that could not be accommodated by the conceptual framework, and therefore needed greater explanation from the actors close to the cases; second, there were cases that contained ambiguities that needed further clarification of the intended expressions.

Theoretical sampling was selected as a suitable strategy for generating additional data in relation to these two issues (Charmaz, 2008). The rationale for theoretical sampling followed the logic of gathering data that was most likely to facilitate the development of the theoretical framework (Locke, 2001). This method of sampling enabled the researcher to investigate analytical leads and refine the emerging categories of the deviant cases (Charmaz, 2008). Furthermore, the pursuit of this sampling strategy enabled the researcher to

make comparisons between the deviant cases by exploring the similarities and the differences, and, therefore, provide a more detailed and robust explanation of an emerging category. In addition to refining the emerging categories, the selective approach to sampling the under-reported cases enabled the researcher to gather explanations from the actors directly responsible for the activity, thereby increasing the clarity of the properties of the existing categories (Charmaz, 2008).

After establishing a sample of 11 cases for the second phase of the study it was important for the validity of the study to identify the actual individuals responsible for the design intervention (as opposed to employees of the consultancy responsible for the activity). Accessing the individuals responsible for leading the design on the cases proved challenging because many of the cases were conducted in the 1990s and the early 2000s; consequently many of these elites had since changed employers. Nevertheless, searches were conducted using the names and generic positions of these individuals on the Google, LinkedIn and LexisNexis databases, with the intention of establishing contact information (see Table 4·11). The combination of employment history within specific time frames and the involvement on prominent projects, leads were identified through LinkedIn and, in some cases, pursued through the contact of former colleagues. Information was gathered on the creative team responsible for each case, principally the creative director leading the project and the senior designer(s) involved in the construction. The ideal contacts in the identified cases were the lead consultants – the creative directors – as it is their role to provide the strategic direction of the creative expression, and therefore priority was given to gaining access to these individuals rather than the more subordinate team members.

Search Terms	Information sought	Databases
"Brand" + "Consultant" + "Consultant x" "Creative" + "Director" + "Consultant x"	Contact phone number Email address Postal address	Google LinkedIn LexisNexis

Table 4·11. Title: Search terms.

Having acquired all relevant contact information for the targets, using the aforementioned process, it became apparent that the targets spanned three continents (North America, Europe, and the Middle East). Despite the geographical challenges, these individuals were the source of the required information and, therefore, it was crucial to gain access to these elites of corporate design. Furthermore, without having any contacts within the targeted consultancies, gaining access to these elites was reliant upon the 'cold-calling' abilities of the researcher. Three tactics were used in securing access to the elites: first, email contact was initiated with one of the elites of lesser status but who was, according to LinkedIn, well-connected. The intention was that, on the basis of having completed a successful interview with this target, the individual's name could be used a referral mechanism when contacting subsequent elites, thereby turning 'cold calls' into a 'warm calls'. Indeed the use of a 'network connection' when arranging an appointment is considered to be a useful technique for establishing an element of trust (Rubin and Rubin, 2005). The second tactic to be exploited was that within the introductory text of the email, a number of competitor's names were listed as having been included in the study and – given their status – it would be befitting to have their views represented alongside their contemporaries. The third tactic was the need to establish credibility to the potential participants by establishing a presence on the University of Leeds website, and therefore chronicling my past credentials as a design practitioner.
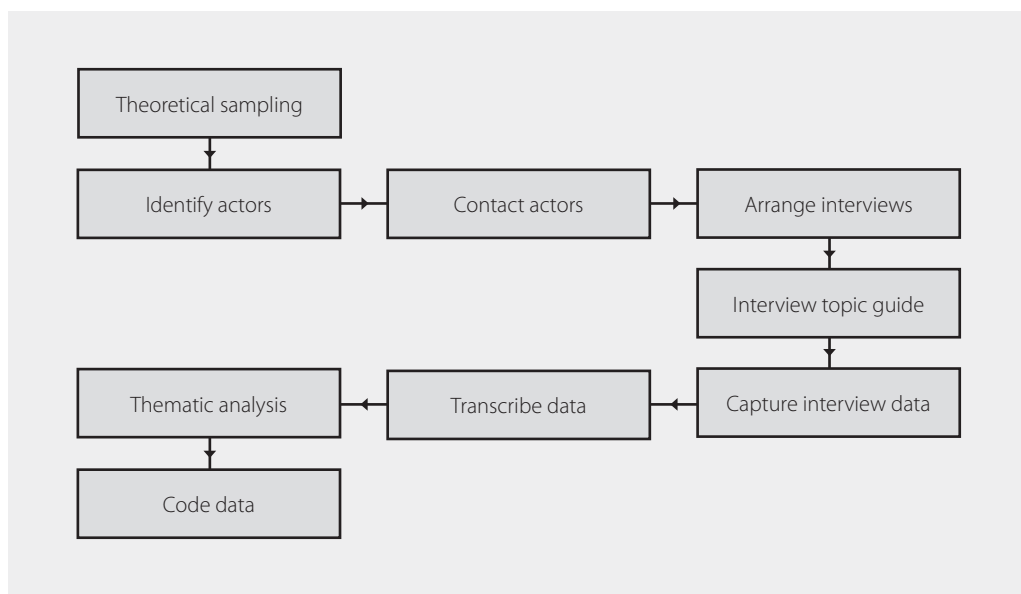
Figure 4·5. Title: Stage two research process flowchart.

In addition to the three aforementioned tactics the request for an interview required only a minimum investment of the elites' time, comprising of a 25-minute telephone interview (Easterby-Smith et al., 2008). In the first instance an introductory email was sent to the selected elites, which was subsequently followed up with the mailing of a more detailed hard copy explanation of the project. This correspondence (see Appendix II) provided the following information: (a) an introduction to the investigators, (b) an explanation of the purpose of the project, (c) why they had been contacted, (d) an outline of their potential involvement, (e) the confidentiality of any arising discussion, (f) how the captured data would be used, and (g) further contact information of the principal investigator (King and Horrocks, 2010). In the instances where no response had been received after the period of a week, a brief follow-up email was sent which summarised the key points of the earlier email and referred to the letter of introduction. Through persistence, discreet flattery and the explicit statement of the actors' minimal involvement, the 'warm calls' proved to be effective in gaining access to the eight elites responsible for the 11 cases. (One of these elites was responsible for the construction of more than one of the theoretically sampled cases).

In securing access to the actors responsible for the design intervention in the sample of cases, the researcher was able to get as close as possible to the activity which occurred, in most cases, over a decade ago. It follows that in order to gain a genuine understanding of the conceptualisation of the activity, it was essential to speak to the individuals directly responsible for their construction. Indeed, interviews are recognised by many (Fontana and Frey, 2005; Kvale and Brinkmann, 2009; Peräkylä, 2005; Rubin and Rubin, 2005; Silverman, 2007) as an ideal method for gaining an in-depth, experiential account of an event – particularly one that occurred 15 years ago and is therefore impossible to observe. In these circumstances the undertaking of semi-structured interviews with the individuals responsible for constructing the symbols was the most appropriate means of understanding how these elites conceptualise the activity, and it was essential for strengthening the credibility of the study (Rubin and Rubin, 2005).

To determine the more suitable method of conducting the interviews consideration was given to the intentions of the study and the information required. In-person interviewing offers numerous key advantages: (i) they can facilitate more accurate and open responses, if conducted within the participants' natural environment; (ii) they are highly effective for discussing sensitive issues; (iii) they are better suited to marginalised and/or elderly participants; (iv) they have also been shown to gain higher response rates (Shuy, 2001). The advantages of in-person interviewing, however, were not pertinent to this study for the following reasons: (a) with the exception of one individual, all of the participants no longer worked at the consultancy where the activity had occurred, and therefore the natural setting of the actor within the context of the activity was not relevant; (b) the information sought was neither personal nor sensitive; (c) the participants are highly successful and were neither elderly nor marginalised; (d) the interview would be conducted within their natural working environment or indeed any environment of their choice so long as it enabled a clear telephone discussion to be accomplished (Shuy, 2001).

A distinct advantage of in-person interviewing is that it enables a much richer type of information to emerge, particularly through the nuances of nonverbal expressions (King and Horrocks, 2010). However, the chosen method of interviewing was selected on the basis of the type of information required; here the knowledge sought was both explanation and greater specificity – detailed explanations of particular cases, not personal opinions (King and Horrocks, 2010; Kvale and Brinkmann, 2009). Therefore, the personal richness of face-to-face communication was less of a priority. The principal consideration was the fact that the participants were located in geographically diverse areas: New York, London, Oman and Edinburgh. Consequently, the inevitable restrictions in the resources of funding and time made telephone interviewing a more feasible but equally valid method of data generation.

Nevertheless the participants located within the UK were given the option – through the correspondence – of either an in-person interview or a telephone interview, as the researcher was prepared to make the necessary sacrifices in order to gain access. It became apparent that the participants preferred the remote communication of email and telephone, perhaps because it made their contribution more minimal than the prospect

of arranging a face-to-face meeting (choice of setting, choice of clothing, etc). A further perceived advantage of the remote method was that it provided participants with the flexibility to change the date and time according to the demands of the workplace – which happened on two occasions – without causing too much inconvenience. Whilst a typical disadvantage of telephone interviewing can be the 'instrumentality' of the medium and its tendency to lead to factual responses, this was not a cause for concern given the nature of this project (King and Horrocks, 2010).

The design of the interviews, which followed a semi-structured format, was considered suitable for ensuring a sufficiently open and inductive approach to discovering emerging concepts and also retained a degree of structure to facilitate the analysis of commonalities (Gillham, 2008). Since the participants were selected for their involvement within specific cases, the structure of the enquiry related to gaining greater insight into the conceptualisation of specific cases, and therefore the design of the interview questions mostly sought description and explanation. Nevertheless, whilst the theme of the interviews was informed by the specific issues from the cases, there was a general structure that commonly applied to each interview.

With reference to Kvale and Brinkmann (2009) and Rubin and Rubin (2005), the structure of the interview questions increasingly became more specific. As such, these were formulated into three types of question and arranged in the following sequence: Explanatory questions, specifying questions and probes. Explanatory questions were open and sought to gather rich descriptions of the cases on two levels: first, the questions focused on the strategic thinking underpinning the brand identities; second, the questions focused on the precise details of how organisational strategy informed the design of the brand mark. Unlike the strategy-orientated explanatory questions, specifying questions were more operationally focussed. These questions were designed to gain more precise information in relation to how particular features of a brand mark served to signify either the organisational activities, the organisational values and/or the organisational vision. Each of the specifying questions related to the conceptual framework (described earlier in the chapter) and therefore this type of question functioned as a verificational tool. The third type of question used in the interviews was the use of probes, which enabled the

researcher to follow-up on responses to the primary questions by asking participants to expand upon introduced concepts, or to pursue emerging issues (see Table 4·12). Probes were also used in the form of direct questions, primarily to clarify the expressive intentions of particularly ambiguous brand marks and check for inaccuracy of interpretation.

1. Explanatory Questions	2. Specifying Questions	3. Probes: clarification & elaboration
• What was the thinking behind 'x' brand identity? • How did this inform the design of the brand mark? • How do values inform the design of the brand marks? • How do you determine what is expressed through the brand mark?	• Why are activities (not) signified in the brand mark? • Why are values (not) signified in the brand mark? • What was the logotype intended to express?	• Can you explain … ? • What did you mean when … ? • Did the logo suggest … ? • Could you tell me more about … ? • Indirect 'why' questions

Table 4·12. Title: Outline of Questions.

In addition to gently extending the conversation, probes enabled the researcher to gain greater depth to initial responses by following up on missing information or new ideas (Rubin and Rubin, 2005). Drawing on suggestions by Rubin and Rubin (2005), a conscious effort was made to ask 'why' questions, in an indirect manner, to avoid confusion. Similarly, an effort was made to avoid the construction of multiple questions within one question, which can introduce confusion in the minds of the interviewees (King and Horrocks, 2010). Furthermore care was taken to avoid the phrasing of leading questions, to avoid suggesting a particular response and thereby introducing bias in to the study (King and Horrocks, 2010; Kvale and Brinkmann, 2009).

With the indicative outline of the interviews completed and the schedule confirmed, the interviews were conducted in the following manner: After a brief exchange of pleasantries and some introductory small talk, all of the interviews were initiated with a summary of the project and its intentions; this subsequently led on to the explanation of why they – as individuals – were selected and what case(s) would be the topic of discussion. (This information was provided in advance by email but was summarised again to aid recall.) In accordance with best practice, the participants were informed that they were on a speaker

phone situated in a private office; permission to record the discussion, for the aid of accuracy, was sought and an explanation was provided regarding the confidentiality of the data, its storage, and the intended use of the data (Fontana and Frey, 2005; King and Horrocks, 2010; Kvale and Brinkmann, 2009).

After capturing the data consideration had to be given to the method of transcription and the level of detail needed to conduct the analysis. The process of transcribing the interviews enabled the researcher to become familiar with the data and determine an appropriate system of transcription (King and Horrocks, 2010). Since the nature of the interviews was to focus on the detailed explanation of past projects, the subsequent analysis was concerned with meaning rather than the use of language. It seemed appropriate, therefore, for the transcriptions to be verbatim facsimiles, in order to provide an accurate account of what was said but without the inclusion of the paralinguistic features of the data, such as every occurrence of pauses and the stalling words 'um' and 'ah' – unless where the usage was pronounced and appeared to take on greater significance (Rubin and Rubin, 2005). Consequently the transcription included 'only the level of detail … likely to be analysed … including any information that might influence the interpretation, such as laughter or gestures of emphasis or puzzlement' (Rubin and Rubin, 2005: 204).

While paralinguistic precision was not warranted, the researcher remained sensitive to the way in which such features convey meaning. One of the difficulties with 'interpreting' the data was the placement of commas and periods, both of which can alter the meaning of a sentence (Poland, 2001). Indeed sentences trail off, change direction and migrate into long combinations of words, which require the intervention of the researcher to make the text meaningful. Consequently the researcher attempted to remain faithful to the audio data by indicating pauses and migrating sentences with the ellipsis (…) while the placement of commas was determined by the researcher's judgement on providing clarity of meaning.

The analysis of the data was informed by the practices of grounded theory, whereby there were three stages of analysis: open coding, focused coding and theoretical coding (Holton, 2007). The process of open coding consisted of fracturing the data for the purpose of ex-

amination, comparison, conceptualisation and categorisation (Strauss and Corbin, 1990). In operating this coding procedure the researcher discovered that rather than follow the classic line-by-line approach, a more holistic application was better suited to this type of data, whereby the segments of data were coded in accordance to the incident-to-incident approach (Charmaz, 2008). The identification of incidents was closely followed by the application of the 'constant comparative method,' where comparisons were made between incidents in order to identify commonalities and variations in the data (Glaser and Strauss, 1967).

As core categories emerged and their properties explicated, the process became increasingly focused on the significant theoretical concepts that emerged from the second phase of analysis (Charmaz, 2008; Holton, 2007). Whereas in open coding the process was concerned with fracturing the data, this second stage of the analysis – selective coding – involved the restructuring of the data (Charmaz, 2008). During this process of synthesis categories became increasingly refined through the examination of the relationships between the adjacent categories and sub categories (Holton, 2007). The analysis subsequently progressed beyond the substantive to the theoretical. This process of shifting the thinking to a more abstract level was facilitated by the use of memos, which were used to record the conceptual connection of ideas that emerged from the data (Holton, 2007).

Whilst the aforementioned procedures suggest a linear set of activities, in practice the process involved considerable overlapping and iterative functions. The laborious nature of this process was intensified by the fact that the analysis was conducted manually without resorting to the use of the qualitative data analysis software programme NVivo. Notwithstanding the ownership and therefore the availability of the aforementioned software package, the researcher chose to conduct the analysis manually based on the value of gaining familiarity of the analytical experience. In support of Saldana's view (2009: 21–22) the researcher felt that as this was a formative experience of conducting qualitative data analysis, there was greater value in learning and fully understanding the physical process of data analysis before utilising software for subsequent studies.

4·9   Considerations and procedures relating to the qualitative enquiry

There are two connections that need to be addressed in relation to the second phase of the project. The first is the involvement of human participants and the inevitable ethical issues that such an approach entails. The second consideration concerns the issue of the validity of interview knowledge as a means of theory generation. With reference to the former issue, one of the key concerns in interview research is the potential risk of personal information becoming available in the public domain (Birch, et al, 2002). However, given the nature of this research, the private lives of individuals was not the point of interest. Nevertheless the researcher incorporated the principles of best practice by proceeding with the project according to the acknowledged guidelines for ethical research (Christians, 2005; British Educational Research Association, 2011). These guidelines were developed to ensure that individuals are treated with dignity and respect by researchers, thereby presenting a means of offering protection from any potential consequences of participating in research (King and Horrocks, 2010).

Prior to conducting any data generating activity, ethical approval was applied for and accepted through the University of Leeds Ethical Review process. Having gained University approval the following issues were given consideration: Informed consent, deception, privacy and confidentiality, and accuracy. In meeting these ethical conditions the researcher sought informed consent from participants by providing open information regarding the nature of the project and its purpose; subjects were asked whether they would be willing to participate – voluntarily – in a pre-scheduled interview (Christians, 2005; British Educational Research Association, 2011; King and Horrocks, 2010). The aforementioned information was communicated via email correspondence and reiterated verbally prior to the start of the interview, before any capturing of data (King and Horrocks, 2010). It was essential that the researcher was open with the project information and forthcoming with the intentions of the study, so as to establish trust with the individuals. Accordingly, at no point were the subjects deceived.

Whilst the information sought from the participants was not considered private or personal, the researcher followed best practice by ensuring that all information remained confidential. Initially, individuals were not identified by name; however, given their leadership role within such prominent projects, the actual identity could be determined by individuals with knowledge of the cases. Nevertheless, after gaining permission to record the interview, the subjects were informed over the storage and usage of the data. The recording of the interviews was a necessary process for the purpose of accuracy. This data was stored in an encrypted folder until the audio file was transcribed, and was deleted thereafter. The researcher was the sole person with access to the data.

Given the purpose of the research, the above measures could seem somewhat excessive. However, as this project was part of doctoral study and therefore constituted research training, it seemed personally worthwhile to follow the professional code of practice for research involving human participants.

The second issue connected to this phase of the study concerns the validity of knowledge gained from interview research. One of the criticisms directed at interview data is the contribution of the researcher in the production of the knowledge; clearly this method of enquiry has the potential to allow personal bias to occur, and therefore introduce distortions in the data (Kvale and Brinkmann, 2009). Whilst detached objectivity is considered unattainable within this research paradigm, the researcher attempted to mitigate such unavoidable personal prejudices by being sensitive to the researcher's own contributions to the production of knowledge (Kvale and Brinkmann, 2009; King and Horrocks, 2010; Fontana and Frey, 2005). The researcher, mindful of such threats to the validity of this research, recognised that this aspect of the study necessitated a reflexive approach to the generation, analysis and interpretation of the data (Kvale and Brinkmann, 2009; King and Horrocks, 2010). In addition to the previously described procedures, which related specifically to the analysis of archival data (i.e., the second coder reliability test and the use of triangulation), a number of other validation procedures were incorporated in this phase of the study. These are briefly outlined below.

First, primary data was sought from the actors directly responsible for the construction of the relevant brand marks, thereby increasing the fidelity and, therefore, the validity in the accounts of the activity. Second, in the majority of cases multiple members of the design team (i.e., creative director, senior designer, strategist) were interviewed as a means of triangulating the accounts across each point of interest (Miles and Huberman, 1994; Maxwell, 2004; Creswell, 2008). Third, the interpretations of the interview data were subjected to two reliability and validity processes: i) member checks and, ii) inter-subjective agreement. In relation to the former process, the interpretations of the transcripts were fed back to the interviewees in order to establish greater confidence in the accuracy of the interpretations (Lincoln and Guba, 1985; Creswell, 2008). The latter process involved the use of an independent observer (a subject-experienced colleague) who compared the theoretical framework alongside the raw data from the transcripts in order to establish the reliability of the interpretations, and to assess the transparency of the reasoning that supported the framework (Kvale and Brinkmann, 2009).

4·10   Summary

The aim of this chapter was to offer a transparent description of the research design conducted in this study. In explaining this design it was appropriate to make the philosophical assumptions of the research explicit at the outset. Prior to discussing the two methods of data collection and data production, the research problem underpinning the project was explored and articulated through two research questions. With the aforementioned information the research design could be explained and considered for its suitability in addressing the stated questions. Nevertheless the focus of this chapter has been on the explanation of the two methods of enquiry used in this research.

In describing the methods used in this research every effort was made to provide an accurate and transparency account of the procedures undertaken. The first method involved the analysis of archival data using both content analysis and visual analysis, as a means of methodological and data triangulation (Maxwell, 2004; Lincoln and Guba, 1985). Based on the findings of the archival data, the second method used semi-structured telephone

interviews to gain explanations from the actors directly involved in the cases, which containing emergent theoretical issues. All of the interviews were recorded – with permission – and transcribed by the researcher to ensure the accuracy of transcription. Furthermore, the act of transcribing the interviews enabled the researcher to get closer to the data, in the sense of better understanding one's own rats (Frost and Stablein, 1992) and, thus, facilitated the initial analytical process (Miles and Huberman, 1994). Naturally such research activity warranted consideration of the inherent ethical issues associated with this method of enquiry.

5   Method I: Interpretation of the archival data

5·1   Introduction

The previous chapter provided a detailed description and justification of the issues relating to the research design. Particular emphasis was assigned to the operationalisation of the conceptual framework, which informed the two analytical procedures used to make sense of the archival data captured in the first stage of this study. Accordingly this chapter presents the author's interpretation of the findings and discusses the changes in the visual manifestations of corporate brand identities.

The analysis was concerned with identifying corporate brand expressions from a sample of the activity from over a period of 50 years. It therefore seemed appropriate to structure the findings of the analysis in chronological order. Within this composition each chronological period is arranged according to the significance of the changes in the expression of the four pivots. An overview of the general patterns from the analysis is followed by a more detailed discussion of the attributes of each pivot, the intention being to develop a more detailed account of the specific changes in the expression of the pivots. The discussion then focuses on the cases that fell outside of the conceptual framework, categorised as 'other', and examines how the characteristics of these cases differ. The subsequent sections explore the related changes in organisational nomenclature, the drivers of branding activity, and the providers of identity counsel. Finally a summary of the research findings leads to the revisiting of the research questions and considers how the findings of this analysis influenced the direction of the second phase of the research.

5·2   The frequency of pivots over time

It is clear from the data that there has been substantial change in what organisations have chosen to expression through their corporate marks over the past 50 years. Table 5·1 displays the absolute frequencies of brand expressions from the data set, classified according to the previously described conceptual framework (see section 4·6, p75). Through the examination of data it became evident that in the inceptive period of corporate brand identity the primary purpose of brand marks was to express 'who' the organisation was and 'what' they did. Both the 'who' and the 'what' pivots accounted for 84 per cent of the expressive content of the cases from the 1960s. The prevalence of the 'who' pivot is a reflection of the number of cases, as every brand identity serves as a visual identificational tool. In relative terms, if there are fewer occurrences of the more strategic pivots ('how' and 'where' constitutive expressions) there is a larger relative proportion of the functional pivots ('who' and 'what' expressions). A more detailed elaboration on these observations is presented in the subsequent sub-sections, and arranged in chronological format (i.e., discussed within the decade of the occurring activity).

The absolute frequencies of pivots over time

	WHO	WHAT	HOW	WHERE	OTHER	TOTAL	PPCR*
1960s	20	11	4	1	0	36	1.8
1970s	20	8	6	4	0	38	1.9
1980s	20	12	5	6	0	43	2.15
1990s	20	11	12	8	1	52	2.6
2000s	20	11	16	11	4	62	3.1
*PPCR = PIVOT PER CASE RATIO							

Table 5·1. Title: The absolute frequencies of pivots over time.

1960s

The frequency of 'what' occurrences in the 1960s was largely the result of a high number of descriptive organisational names. During this decade descriptive names accounted for 72·7 per cent of the cases that featured the 'what' pivot; British Rail and British Steel are two examples. With the exception of British Steel all of the cases featuring descriptive names prior to the design intervention, retained the existing nomenclature. Furthermore, descriptive nomenclature appeared to be favoured by particular sectors, such as banking and aviation: Chase Manhattan Bank and United Airlines are examples of nomenclature that typify their respective sectors. By contrast, the only case that had an existing descriptive name was British Oxygen Corporation, which – as part of the design intervention – removed the descriptive nomenclature by adopting a shorter abbreviated version (BOC). Without a descriptive name, and without a visual reference to its category of operations, the BOC case no longer contained a 'what' pivot.

Graphical expressions of the 'what' pivot and the 'how' pivot.

Figure 5·1. Title: UPS and KLM brand marks.

In the cases where the 'what' pivot was expressed but the organisations did not have descriptive names, the pivot was expressed typically through an unambiguous visual reference to the organisation's category of business. An example of this would be UPS and its

use of the parcel illustration situated atop of the shield. As a further point of interest there was a significant number of cases – 45 per cent – that chose to express the 'what' pivot through both the nomenclature and a visual reference, which consequently rendered the visual component as an illustrative support for the name.

Despite the prevalence of the functional 'who' and 'what' pivots during the 1960s, there were occurrences of the more strategic 'how' and 'where' pivots. The 'how' pivot occurred in 20 per cent of the cases, typically expressed through the use of a metaphorical symbol. An example of this would be the fox icon in the Hadfields' brand identity, which was intended to express a distinctive attitude that related to the personality of the organisation. Similarly, the crown symbol in the KLM brand mark was both a historical organisational reference and an associative device to suggest a superior level of service. However, the 'where' pivot was less prevalent during this decade, with only the Mobil case to feature this pivot. In the aforementioned case, the pivot was expressed through the use of the mythological symbol of the Pegasus, which, since it was leaping to the right-hand side, suggested movement towards the future.
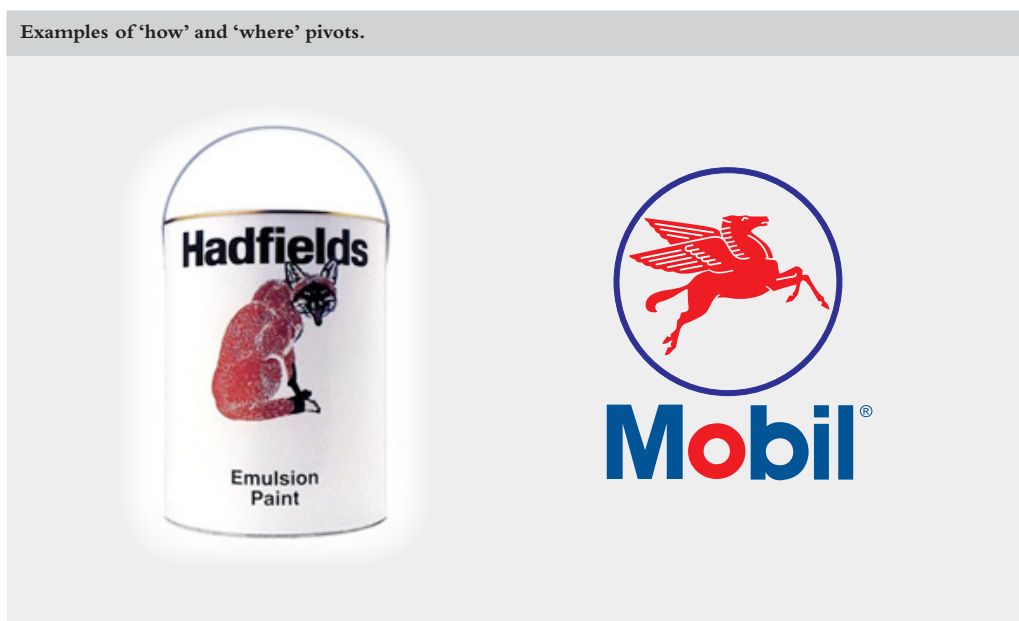
Figure 5·2. Title: Hadfields and Mobil brand marks.

1970s

The 1970s saw a shift from the dominance of functional pivots to an increase in the occurrence of the more strategic pivots. The number of cases featuring a 'what' pivot declined from 55 per cent of cases (in the 1960s) to only 40 per cent of cases in the 1970s. In all of the cases featuring a 'what' pivot fewer cases made use of a visual reference to express the pivot; previously 73 per cent of cases featuring this pivot had used a visual device to indicate the pivot, whereas only 50 per cent of 'what' pivots from this decade used a visual device to express the pivot.

Whilst there was a significant decline in the use of graphical references to signify the 'what' pivot, the proportion of cases using descriptive or categorically suggestive organisational names to express the 'what' pivot was marginally higher than the previous decade, an increase from 73 per cent to 75 per cent. However, whilst there was an increase in the number of 'what' pivots being expressed through descriptive nomenclature, the overall proportion of descriptive nomenclature – relative to the sample of cases – had declined from 40 per cent to 30 per cent during this decade. By contrast, there was an increase in the occurrence of arbitrary nomenclature during the decade, with 70 per cent of cases featuring non-specific organisational names. The cases for Exxon, Shell, Chevron and Kodak are examples of this type of nomenclature.

Figure 5·3. Title: Merrill Lynch brand mark.

During the 1970s there was a significant rise in the occurrence of the more strategic pivots. There was a two-fold increase in the frequency of 'how' pivots, with an expanding number of cases using metaphorical symbols to express the pivot. Merrill Lynch, Quaker and Bovis were all cases that made use of metaphorical symbols, these being the Merrill Lynch bull, the iconic portrait of a quaker, and Bovis's humming bird. Similarly, there was a fourfold increase in the number of cases featuring the 'where' pivot. Whereas in the previous decade only 5 per cent of cases expressed a 'where' pivot, this number had climbed to 20 per cent of cases. More specifically, there was an increase in the use of generic aspirational devices in the sample of brand marks, with examples being Dresdner Bank's upward-pointing triangle, and Citicorp's compass rose symbol – used as a signifier of global aspirations.

Examples of generic aspirational devices.
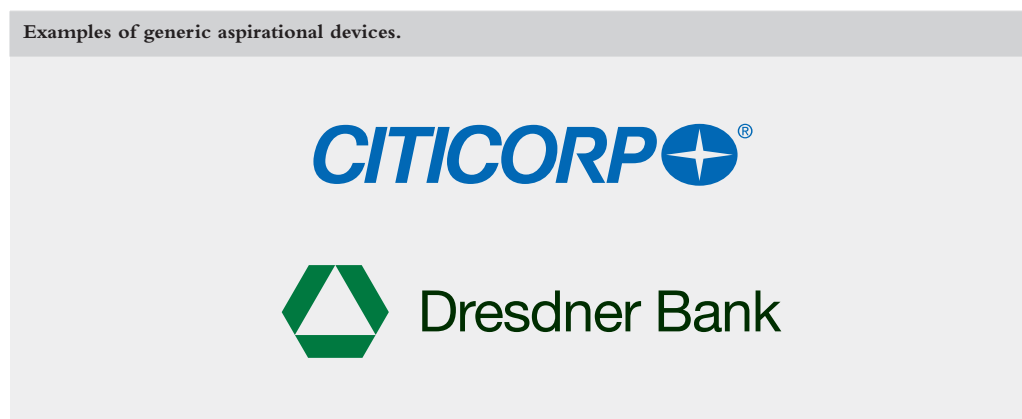
Figure 5·4. Title: CitiCorp and Dresdner Bank brand marks.

1980s

The cases from the 1980s showed an increase in the frequency of the 'what' pivot, with 60 per cent of cases featuring this pivot. In half of these cases the pivot was signified through descriptive nomenclature, such as National Power, British Telecom and Midland Bank. The remaining half of the cases used a graphical means of signifying the 'what' pivot, such as Legal & General's umbrella – a symbolic metaphor of protection – and Repsol's use of the sun – a symbolic metaphor of energy.

With only 25 per cent of the cases containing a 'how' pivot, there was a sharp decline from the previous decade in the use of metaphorical symbols; Akzo was the only case that featured a symbolic device – a humanistic figure that expressed a sense of achievement through its opened arms gesture. However, during this decade there were two cases that expressed the 'how' pivot through suggestive nomenclature: Prudential and First Direct. The remainder of the 'how' pivots were expressed through the use of graphical suggestion, an example being the passionately hand-rendered horizon of the Repsol brand mark.

The 'where' pivot had a comparable occurrence to the number of 'how' pivots, with 30 per cent of all cases during this decade featuring a 'where' device. In 83 per cent of these cases the 'where' pivot was expressed through a generic, right-facing graphical device. Two examples of this are Nynex's hidden arrow pointing to the right and the sails of Q8's brand mark situated on the right, suggesting the movement towards the future. The only case that expressed the 'where' pivot through an aspirational device was AT&T's brand mark, which used the symbol of a stratified sphere to suggest their aspiration of becoming a global provider of digital communications (Marquesman, 2001).
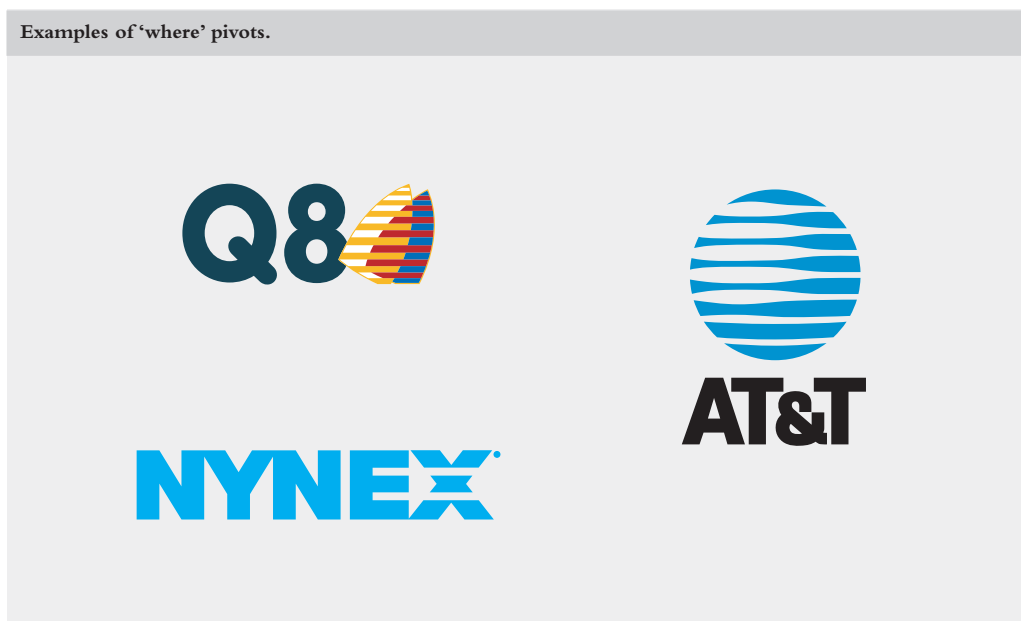
Figure 5·5. Title: Q8, NYNEX and AT&T brand marks.

1990s

The cases from the 1990s showed a more evenly distributed set of pivots. However, despite the greater spread of pivots the 'what' pivot retained a similar frequency of occurrence to the previous decade, with only a 5 per cent decline. Whilst 55 per cent of all cases continued to express the 'what' pivot, the bigger change was the method in which this pivot was expressed. In previous years there had been a large proportion of cases that expressed the 'what' pivot through both organisational nomenclature and a graphical manifestation of the identity; whereas in this decade there was only one case that used both the name and a graphic device to express the 'what' pivot.
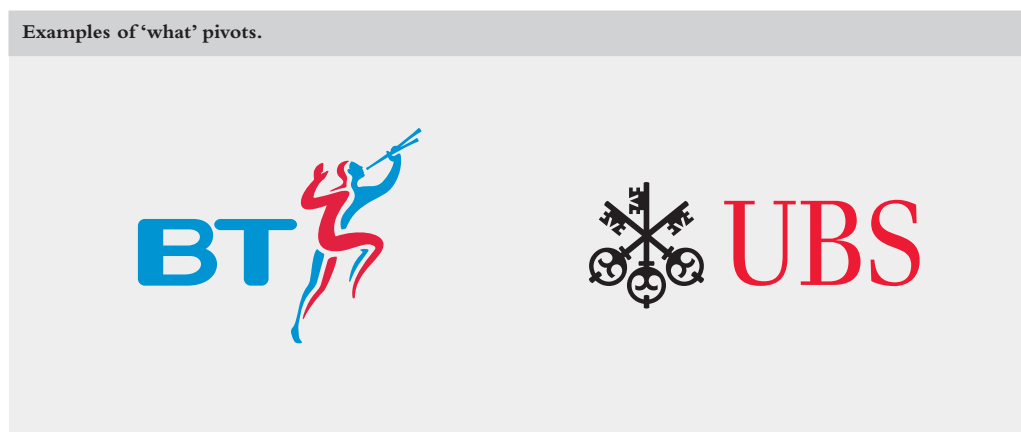
Figure 5·6. Title: BT and UBS brand marks.

Irrespective of the graphical expression 25 per cent of all cases from this decade used either descriptive or suggestive nomenclature, with notable examples being the Bank of America and Canadian Airlines. However, there were two cases where the descriptive nomenclature was modified to become less descriptive; these cases were British Telecom and Union Bank of Switzerland. British Telecom removed the explicit national and categorical references to use a more discreet abbreviation: BT. Nevertheless the identity continued to express the 'what' pivot through graphical suggestion (the Piper was illustrated as listening and communicating). In the case of BT the organisation wanted to signify a more global presence and felt that the geographical reference had its limitations. In addition to the geographical change BT broadened its category association by positioning itself into a higher substantive category, away from the specific telecoms positioning to a broader

'communications' positioning. The second case, Union Bank of Switzerland, removed their descriptive nomenclature to become UBS; as with the previous case, the 'what' pivot was retained through the use of a key symbol – a generic category indicator that is a clear reference to the security offered by banking institutions.

The number of cases expressing the 'how' pivot increased twofold, up from 25 per cent of cases in the previous decade to 55 per cent of cases in the 1990s. The biggest change in the 'how' pivot was the fourfold increase in the number of cases expressing 'how' through graphical means – as opposed to through a metaphorical symbol, such as BT's Piper symbol – which accounted for 82 per cent of all cases that featured 'how' pivots (see figure 5·13). An example of a 'how' pivot being expressed through graphical means would be the logotype for Telefónica's identity; the letterforms are set in a cursive, informal, handwritten script, suggesting both humanistic qualities and fluency in communication. Furthermore, the letterforms of the Telefónica logotype have a modulated stroke: this is where the direction of the stroke influences the thickness of the stems of the letters. This type of letterform is typically associated with calligraphy and is widely considered to be the sophisticated 'art form' of handwritten messages (Bringhurst, 2002).

Example of a 'how' pivot.

Figure 5·7. Title: Telefónica brand mark.

There was a continuing increase in the occurrence of the 'where' pivot, with 40 per cent of all cases from the 1990s expressing this pivot. In 75 per cent of these cases, this pivot was expressed through a generic future-reference signifier – a device facing or situated to

the right of the graphical arrangement. Examples of such devices include arrows (Bank of America and FedEx) and right facing symbols (BT's Piper and Klöckner & Co.'s dog). These forms of graphic devices appear to be the conventional method of expressing the 'where' pivot up until the 1990s. The case for Lloyds TSB, however, introduced a nuanced version that appeared to be a feature that was peculiar to the financial industry. Lloyd's symbol of the black horse can be seen rearing right (a position referred to as 'rampant' in heraldic terms) whereas the head of the horse is facing left, as if to suggest that the organisation is moving towards the future whilst looking back to the past. Similarities occur in the cases of Barclays, Merrill Lynch (in the 1970s) and the Midland Bank (in the 1980s).

Examples of generic and specific 'where' pivots.

Figure 5·8. Title: Bank of America, Lloyds TSB and Xerox brand marks.

In the cases from previous decades the 'where' pivot was expressed through a generic device. In the 1990s, however, there was an occurrence of a 'where' pivot expressed through a specific future aspirational device. In 1994 Xerox's modified visual identity was given a monogrammatic-style initial 'X', in which the upper right-hand stroke of the letter (a

signifier of future aspiration) was rendered in a pixelated manner (see figure 5·9). This graphical expression was a representation of the organisation's vision of embracing the digital future of reproduction (Marquesman, 2002).

2000s

The 'what' pivot remained a widely expressed pivot during this decade, with 55 per cent of cases expressing this pivot – identical to the cases from 1990s. In the cases from the 1960s, 1970s and 1980s, the typical means of expressing the 'what' pivot was through descriptive or suggestive nomenclature, whereas in this decade the only source of 'what' pivots – expressed through descriptive nomenclature – was in the financial sector: Bank of New York, Bank of New York Mellon, and Credit Suisse are prime examples.

Examples of graphically suggestive and symbolic 'how' pivots.

Figure 5·9. Title: UPS and Amazon brand marks.

Accordingly descriptive nomenclature declined and graphical expression increased, with 75 per cent of cases featuring a 'what' pivot using graphical devices for the expression. For instance, the organisation formerly known as British Petroleum simplified its no-

menclature to BP, thereby removing the explicit description but continuing to express the 'what' pivot through the use of the Helios symbol – a reference to powerful, clean energy. However, the most significant change in the expression of the 'what' pivot during this decade was the reduction in tautological expressions: two devices used to express the same pivot. Whereas in earlier decades, from the 1960s to the 1980s, there had been a large proportion of cases that expressed the 'what' pivot through both the nomenclature and the graphical emblems; however, in this decade the 'what' pivot was solely expressed through one device, thereby avoiding redundant replication of two devices to signify the same pivot.

Examples of graphic and specific 'where' pivots.
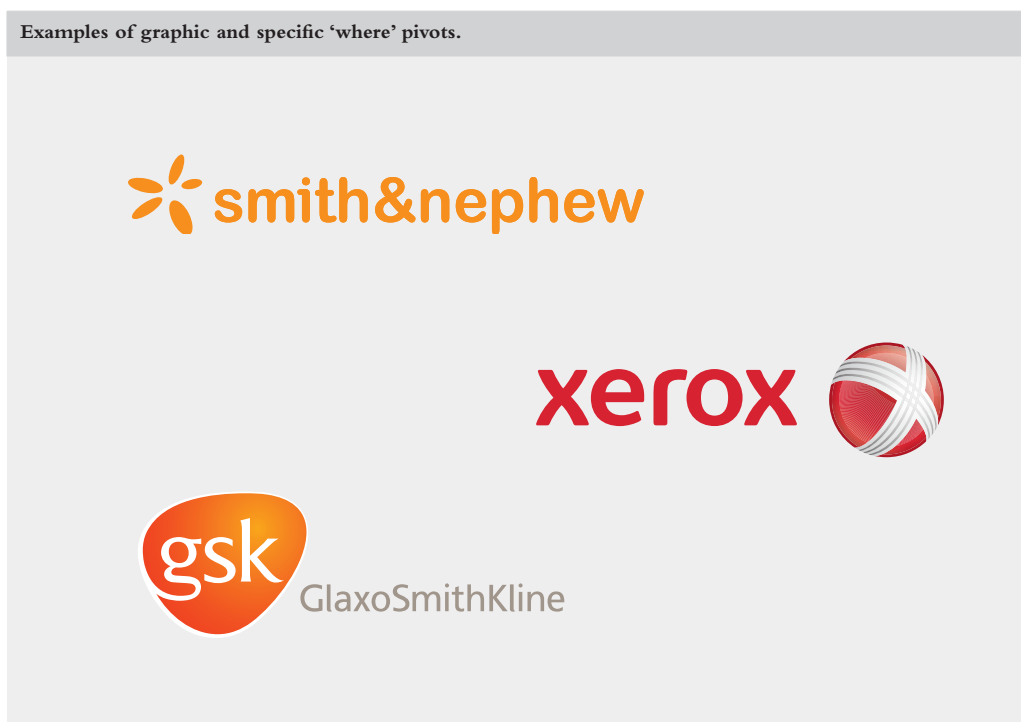
Figure 5·10. Title: Smith & Nephew, Xerox and GSK brand marks.

In addition to the expressive changes in the 'what' pivot, there was an increase of 25 percentage–points in the occurrence of the 'how' pivot during this decade, with 80 per cent of all cases expressing the pivot. In 69 per cent of these cases the pivot was signified through graphical attributes. An example of this would be the case for UPS and its use of the tonal gradient and the upward–rising curve used to graphically suggest motion and

dynamism. The remainder of the cases expressed the 'how' pivot through a metaphorical symbol such as the smiling arrow in the Amazon brand identity, which was a signifier of the organisation's focus on customer satisfaction; the arrow also served as a means to express the 'where' pivot and, therefore, convey that the organisation was future-orientated (see figure 5·10).

With 55 per cent of all cases from this decade expressing the 'where' pivot, there was a continued increase in the occurrence of this strategic pivot. In 64 per cent of these cases the pivot was expressed through a generic right-facing device, such as the active patient leaping forward in the Smith & Nephew visual identity (see figure 5·11). The remaining cases contained an equal quantity of two types of aspirational device: 18 per cent expressed the pivot through a generic device, and 18 per cent expressed the pivot through a specific device. Both Xerox and AT&T were cases that signified their global status through a generic aspirational device – a spherical symbol, while BP and GlaxoSmithKline (GSK) were cases that used specific aspirational devices. (BP's visual identity used the Helios symbol as an explicit reference to the specific aspiration of moving 'beyond petroleum', and GSK's visual identity was both suggestive of a new life-form and a directional symbol pointing towards the upper right quadrant, with a discreet use of gradient-spotlight emphasis on this quadrant.)

5·3   The changes in the expression of the pivots

The previous section showed that the expression of pivots in corporate brand marks have substantially changed over the past five decades. It was noted that there were distinct changes in the types of devices used to express the pivots. In the earlier decades the 'what' pivot was typically expressed through descriptive nomenclature, whereas in later decades the 'what' pivot was increasingly expressed through graphical suggestion. As figure 5·12 illustrates, the frequency of the 'what' pivot has remained relatively constant, whereas the device used to express the pivot has substantially changed. The following section describes the changes in the use of signifiers to express the four pivots.

'What' pivot

In the 1960s 73 per cent of cases featuring a 'what' pivot used descriptive or suggestive nomenclature as the mode of expression. A further 45 per cent of these cases used both nomenclature and graphical suggestion to express the 'what' pivot. By the 1980s the number of cases featuring a 'what' pivot expressed solely through nomenclature had declined to 50 per cent. However, 83 per cent of these cases used two devices to express the 'what' pivot (42 per cent of the overall 'what'). By the 1990s 45 per cent of the cases featuring this pivot expressed it through nomenclature; however, only 20 per cent of these cases used two devices to express this pivot. This data suggests, therefore, there was a clear shift from the use of tautological expressions to a more considered use of expressive devices. This was clearly apparent in the cases from the 2000s, where there were no cases that featured two devices to express the 'what' pivot, despite 25 per cent of the cases (that featured a 'what' pivot) expressing the pivot through descriptive nomenclature.

The devices used to expressive the 'what' pivot
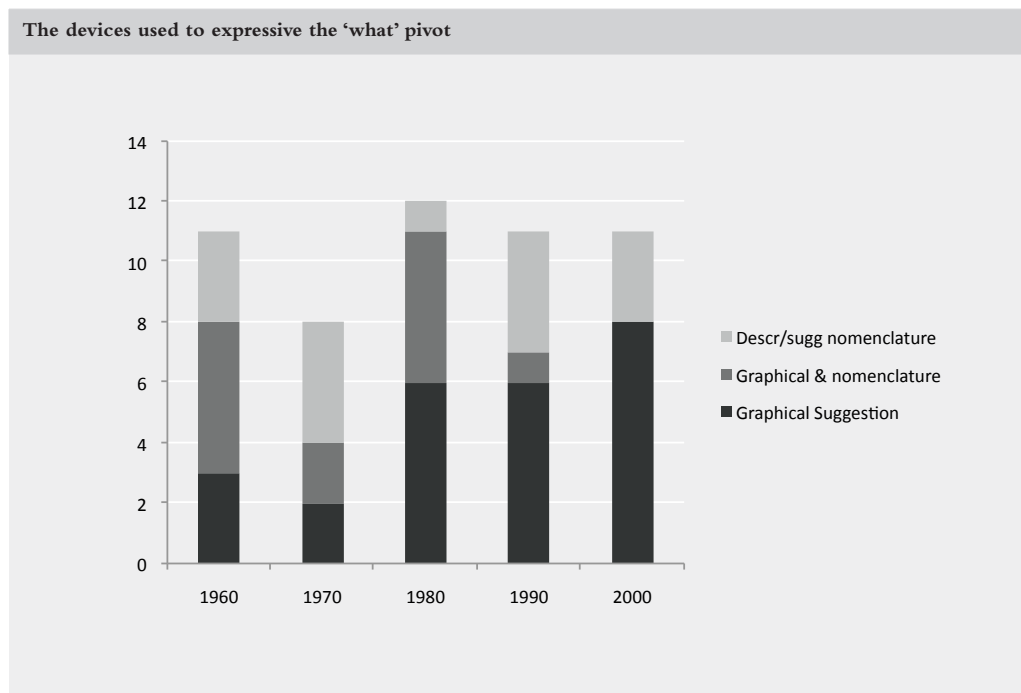
Figure 5·11. Title: The frequency of devices used in the 'what' expression.

'How' pivot

From the 1960s to the 1980s the 'how' pivot occurred in only 25 per cent of cases, and was predominantly expressed through either graphical attributes or a metaphorical symbol as opposed to suggestive nomenclature. The sharpest increase in the number of occurrences was not until the 1990s, where 55 per cent of all cases featured a device that expressed this pivot. In 64 per cent of these cases the pivot was expressed through graphical attributes alone, such as through the use of an expressive logotype. A further 27 per cent of cases also expressed this pivot through graphical attributes, but alongside a suggestive name. An example of such a case would be Corus, where the name suggests a unified organisation performing together in synchronicity; this nomenclature is further reinforced through the subtle graphical silhouette of a bugle within the monogram. The remaining 9 per cent consisted of cases using a metaphorical symbol to express the 'how' pivot, an example being BT's piper symbol.
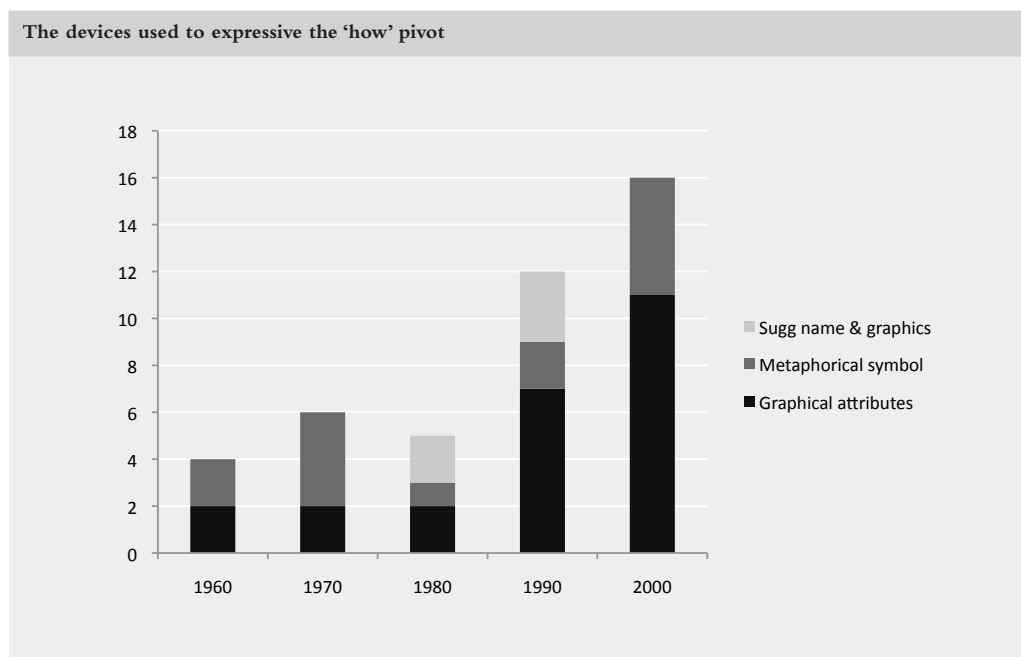
Figure 5·12. Title: The frequency of devices used in the 'how' expression.

By the 2000s the occurrence of the 'how' pivots had increased significantly, with 80 per cent of cases expressing this pivot. In all of these cases the pivot was expressed efficiently through one device, either through graphical attributes or a metaphorical symbol; there

were no cases that expressed this pivot through nomenclature, and therefore there were no cases that duplicated the expression through multiple devices. In 69 per cent of these cases the pivot was conveyed through graphical attributes, such as the expression of dynamism through the tonal gradients apparent in the visual identities of UPS, Pfizer and GlaxoSmithKline. The remaining 31 per cent of cases used a metaphorical symbol as the expressive device. An example of this would be the case of Klöckner & Co., where the symbol of a dog retrieving a ball was used as a device to suggest the willingness to satisfy customers' demands.

'Where' pivot

Throughout the 1960s, 1970s and 1980s the low occurrence of the 'where' pivot (5 per cent, 20 per cent and 30 per cent respectively) was expressed in a generic manner. In all of the cases from these three decades the pivot was expressed through either a right-facing, generic future-focused device or through an upward-pointing generic aspirational device. In the 1960s the only case to feature this pivot was Mobil, which used a right-facing Pegasus symbol. In the 1970s the dominant device was the generic aspirational device, as seen in the brand identities for Dresdner Bank, Nasa and Citicorp. The subsequent decade, the 1980s, showed a similar occurrence of the pivot but with an inverted dominance on the right-facing device. Examples of cases featuring such devices would be Akzo, Nynex and Q8.

In the 1990s 75 per cent of all cases that featured a 'where' pivot used a generic, right-facing device, as the means of expressing the pivot. One example would be the case of Bank of America, where there is a right-facing arrow incorporated within the flag motif. The only occurrence of an aspirational 'where' pivot was in the case of Barclays, and its use of a sphere to signify global ambitions. Additionally there was one occurrence of a specific expression of a 'where' pivot in the case of Xerox (see Figure 5·9).

By the 2000s 55 per cent of all cases featured a 'where' pivot, with 64 per cent of these cases expressing the pivot through a generic, future-focused device. The generic aspirational device accounted for 18 per cent of cases, while the remaining 18 per cent of cases used a specific aspirational device – a six percentage point increase on the previous

decade. In addition to the specificity of BP's Helios symbol (previously noted in section 4·5·1) GlaxoSmithKline's marque had a specific expression of a 'where' pivot. The graphical suggestion of the sperm-penetrating-the-egg is both a representation of the merger of two parents and of the new entity of the offspring. Furthermore the symbol of early life can be seen as an expression of future potential and growth, and therefore would appear to be a highly pertinent metaphor for a pharmaceutical and healthcare organisation whose mission is to 'improve the quality of human life'.

The devices used to expressive the 'where' pivot

Specific Aspirational
Generic Aspirational
Generic Future Focused
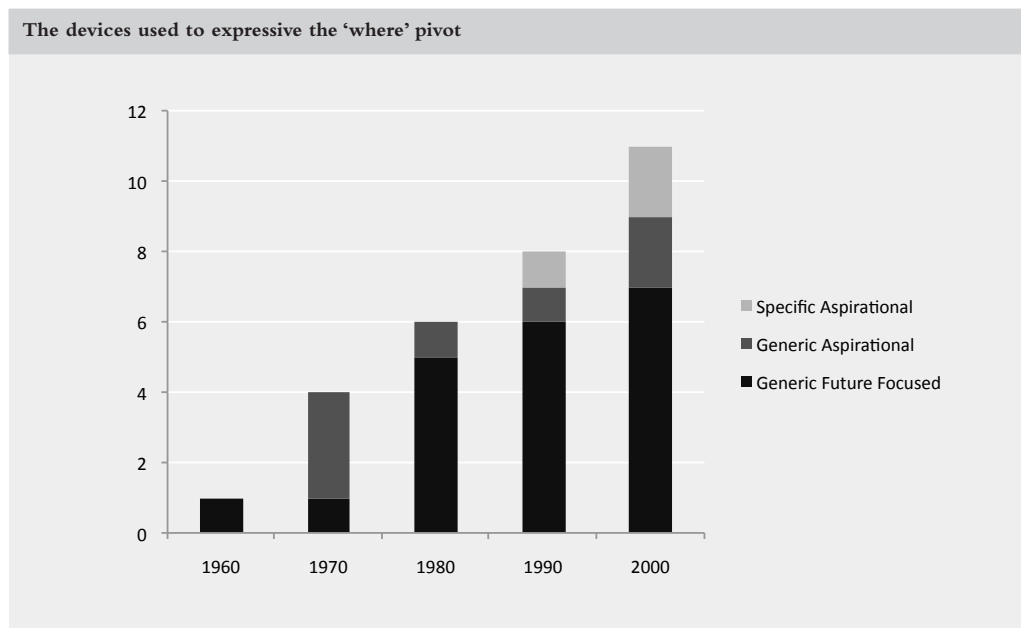
Figure 5·13. Title: The frequency of devices used in the 'where' expression.

5·4   Beyond the conceptual framework: the outliers

The conceptual framework captured the expressions in the majority of the cases; however, there were five cases that had visual expressions that fell outside the conceptual framework. These cases consisted of organisational identities for diversified parent organisations, thus with operations in multiple activities. These parent brands, with such heterogeneous portfolios, could not feasibly signify all of their operational areas, or indeed signify any singular categories without disregarding other areas of activity. (An exception was Unilever, which was the only case that signified the 'what' pivot through its illustrative icons.) All five diversified cases focused on expressing a common denominator that linked

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all organisational activities. The case for Smith & Nephew is an example of this strategy: the consultancy was 'hired to help it define a "big idea" that would unite the businesses through a common goal and build recognition and equity across its diverse brand portfolio' (Wolff Olins, 2009a).

Two cases featuring benefit-encapsulations of organisational activities.

Figure 5·14. Title: Diageo and Unilever brand marks.

Diversified parent organisations, however, went beyond merely signifying the linkage between their activities. In all five cases coded as 'other' the focus of the visual identity was on expressing the benefit of the collective activities. An extract from the Diageo case provides a suitable example: 'Guinness and Grand Met executives said they wanted a name that conveyed the idea of pleasure … the consultancy suggested various names, beginning with a focus on customer benefit' (Cooper, 1997). The common linkage between Diageo's portfolio – predominantly consisting of premium liquor brands – and the consumer benefit is the concept of 'pleasure'. Such benefit-orientated emphasis was apparent in the case for Fortis, as stated by the chairman, Allen Freedman: 'a consistent and aggressively communicated global brand mark – with a customer-focused brand promise – will help associate our US company even more closely with attributes and benefits that are meaningful to the US market' (Business Wire, 1998). In a third example the case for Unilever expressed a benefit-orientated encapsulation of its activities, whereby its brands were led by a single idea: 'adding vitality to life' (Wolff Olins, 2009b).

The occurrence of cases that focused on expressing the benefit of the collective organisational activities reflects a strategy more closely related to product branding. Indeed four of the five cases were for parent organisations, which owned large portfolios of product brands. However, in contrast to consumer-focused product brand expressions, these parent brands focused their expressions at both an external and an internal audience. Furthermore the messages of the organisational brands were not expressed solely as organisational point-of-differences, but expressed as galvanizing, organisational missions. A suitable example is provided by Smith & Nephew's CEO, Sir Christopher O'Donnell, when he stated that his organisation's technology-led medical devices businesses 'existed to help people regain their lives' (PR Newswire, 2003).

Such beneficial and purposeful expressions appeared to be the convention among all five deviant cases. Nevertheless, whilst such expressions convey a beneficial encapsulation of the organisational activities, and signify a sense of purpose within the organization, the nature of defining the varied activities of large diversified organisations has led to a higher order categorisation of activities, thereby generating less specificity in the corporate expression. For instance, the case for GlaxoSmithKline stated the brand expression as 'improving the quality of human life by enabling people to do more, feel better and live longer' (FutureBrand, 2008). Similarly the case for Smith & Nephew, with its focus in orthopaedics, endoscopy, and wound management markets, articulated their brand expression as 'helping people to regain their lives' (PR Newswire, 2003). The inference from the analysis of data was that the greater the diversification of the organization, the greater the genericism of the organisational expression.

The tendency for diversified organisations to move to higher-order categories, such as the 'life' theme clearly apparent in the two previous examples, was not restricted to the healthcare sector. The case for Unilever, an FMCG organisation, expressed a similar theme with their mission focused on 'adding vitality to life'; similarly the visual identity was designed to express the concept of 'vitality' (Wolff Olins, 2009b). According to the case Unilever had decided that they were too diffuse and, therefore, used their 'vitality' concept as a mechanism to rationalize their brand portfolio by divesting brands that were misaligned with the new unifying idea.

This notion of diversified organisations using a higher-order constructs to encompass and summarise their beneficial activities was further demonstrated in the case for Diageo. This organisation, despite being one of the lesser-diversified organisations with a focus predominantly located in the alcoholic beverages industry, appeared to have an unspecific expression. According to the consultancy case study the Diageo identity contained a visual manifestation that expressed the organisational vision as 'everyday pleasure, everywhere' (Wolff Olins, 2009c). The common linkage between Diageo's portfolio – consisting of premium liquor brands – and the consumer benefit is the concept of 'pleasure', which appears to have an apparent suitability but is nevertheless an unspecific term. Moreover the loose notion of 'pleasure' is further amplified by the equally vague surrounding words, used to suggest consistency and the global scope of their activities: 'everyday' and 'everywhere'.

An abstract, benefit-encapsulation case.
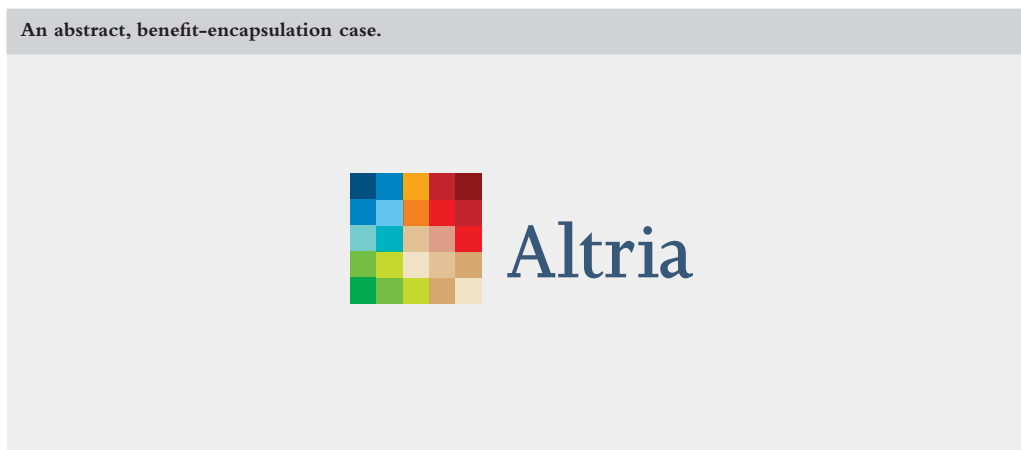
Figure 5·15. Title: Altria brand mark.

The use of an encompassing concept to unify the collective activities of an organisation was delivered with greater subtlety in the case for Altria. As the newly introduced parent brand of Philip Morris and St. Michelle Wine Estates, Altria's core activities were firmly located in the tobacco and beverage industries. According to press coverage that emerged around the time of the brand activity, the name Altria was derived from the Latin term 'altus', which was a reflection of the organisation's ambition to 'reach higher' (Robison, 2001). In addition to the apparent aspirational expression, the concept could be interpreted as a beneficial common denominator of the organisation's activities, given the intoxi-

cating nature of tobacco and alcohol- based products. To complement the heavily coded nomenclature the visual identity appeared somewhat ambiguous, which was perhaps an intentional mechanism for establishing associative distance between the parent brand and the more strongly associated product brand of Philip Morris. This apparent obscurity indicated the organisation had embraced the 'empty vessel' strategy, whereby the meaning can be decanted.

In total three different consultancies were responsible for the design intervention of the five outlier cases. One of the consultancies was responsible for producing the design intervention for Diageo, Smith & Nephew and Unilever, while the Altria and GlaxoSmithKline were designed by two different consultancies. Such a contracted occurrence of design intervention typifies the activity of corporate identity, whereby a small number of specialists account for the majority of the large identity programmes; these are informally regarded as the 'big six' consultancies. Nevertheless, in terms of the objectives and the reasons driving the brand activity, there were similarities across the five cases.

In the five outlier cases two types of driver occurred: structural drivers, involving mergers, acquisitions and restructured organisations, and strategic drivers that invariably involved addressing a misalignment issue. (Drivers are discussed in greater detail in section 5·6.) Regardless of the apparent differences between the two drivers, the objectives of the design intervention were very similar: the intention was to achieve a singular brand expression that encompassed a diverse range of organisational activities. In the two cases conducted as a result of a merger (Diageo and GlaxoSmithKline), both cases sought to achieve a singular brand expression that encompassed the collective activities of the newly formed organisation. In the three cases that were conducted for strategic reasons (Altria, Smith & Nephew and Unilever), the organisations had grown mostly though acquisition and had a diversified portfolio of activities that had broadened beyond the scope of the former identities. Consequently these diversified organisations sought to achieve a unified expression, much like the merging entities of the structurally driven cases.

There were some additional similarities in the outliers, in terms of their expressions. Only one of the cases, Unilever, contained a 'what' pivot within the visual brand expression.

Accordingly there were no limiting devices such as descriptive names or illustrative visual references to specific categorical activities. The lack of 'what' pivots was, it seems, a reflection of the cases having less specificity as a result of diversification. By contrast, three out of five cases contained a 'how' pivot (exceptions being Altria and Diageo). This pivot, which often refers to the expression of organisational values, was typically embedded within the visual manifestation of the brand identities; however, as the organisational values of the two aforementioned cases were less explicit, the subtlety of expression did not sufficiently constitute the presence of the pivot. In relation to the outliers the 'how' pivot appeared less influential, in terms of driving the content of the visual expression; this pivot was typically deployed as a muted stylistic agent.

5·5   The changes in nomenclature over time

In addition to the aforementioned changes in the pivot expressions there have been distinct changes in organisational nomenclature over the past five decades. Through the analysis of the data it became apparent that it was necessary to develop a clearer distinction between the two types of nomenclature that had occurred over time: status-orientated nomenclature, and expression-orientated nomenclature. A description of the development of these distinctions, used in the analysis of nomenclature, precedes the discussion of the changes in nomenclature over time.

The first aspect of the distinction, previously referred to as status-orientated, involved discriminating between the levels of change in the nomenclature of an identity programme. It emerged that there were four different categories of nomenclature. The first category encompassed the cases that retained the existing nomenclature without any further modification. An example of this would be the recent case of Unilever, which involved the redesign of the visual manifestation but retained the existing name. The second category encompassed the cases that involved the modification of existing names, typically through the contraction or abbreviation of an established name. An example of this would be the case of British Telecom and its change of nomenclature to the abbreviation BT. The third category encompassed the cases that involved a new amalgamation of two or more exist-

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ing names, typically as a result of a merger. An example of this would be the merger between GlaxoWellcome and SmithKlineBeecham, which became GlaxoSmithKline. The fourth and final category encompassed the cases that involved entirely new nomenclature as part of the branding activity. An example of this would be the case of Diageo, which was formed in 1997 following the merger of Guinness and Grand Metropolitan.

The second distinction was developed in an attempt to categorise the expressive attributes of organisational nomenclature. The first category of this classification encompassed the cases whose nomenclature was considered to be abstract – any name that had an ambiguous message. An example of such a name would be Altria. Whilst this name was derived from the Latin word 'altus' the level of abstraction rendered the name ambiguous. The second category encompassed those cases whose nomenclature contained a descriptive reference to the organisation's industry or core activity. An example of a case from this category would be Deutsche Bank, where the word 'bank' clearly indicates the organisation's core activity. The third category encompassed those cases that used a contracted form of descriptive nomenclature, such as an abbreviation or acronym – categorised as descriptive code. An example of this would be the case of UPS (formerly known as United Parcel Service). The fourth category encompassed those cases whose nomenclature was derived from a surname – or surnames – therefore indicating a form of ownership or origin. An example of this category would be the case of Pfizer, which was named after one of the founders, Charles Pfizer. The fifth and final category encompassed those cases whose nomenclature was independently connotative and was, thus, categorised as suggestive. An example of this category would be the case of Corus, whose name is suggestive of a unified and organised workforce.

Having established the two domains of classification, the changes relating to the status of nomenclature became apparent. In 83 per cent of all cases the branding activity involved the use of some form of existing nomenclature: 67 per cent of these cases retained existing nomenclature without any modification; while 11 per cent of cases used amalgamated versions of previously existing nomenclature; and five per cent used a contracted form of previously existing nomenclature. In the majority of cases existing names remained unchanged. The implication here was that a change of nomenclature was considered ei-

ther unnecessary to the aim of the branding activity or a last-resort attempt at severing an entrenched negative association and, thus, an appropriate reason for eliminating brand equity. In the cases where the branding activity was conducted as a result of a merger, the amalgamated nomenclature typically contained compounds from former organisational names. Clearly the intention behind the retention of the former organisational brand associations is the attempt to preserve any established goodwill of the former brands. In the smaller five per cent of cases the existing name was contracted to an abbreviated form. The principal reason behind this was that the existing organisational nomenclature was considered to be limited in scope, such as a name that linguistically contradicted geographical expansion or diversification of activities.
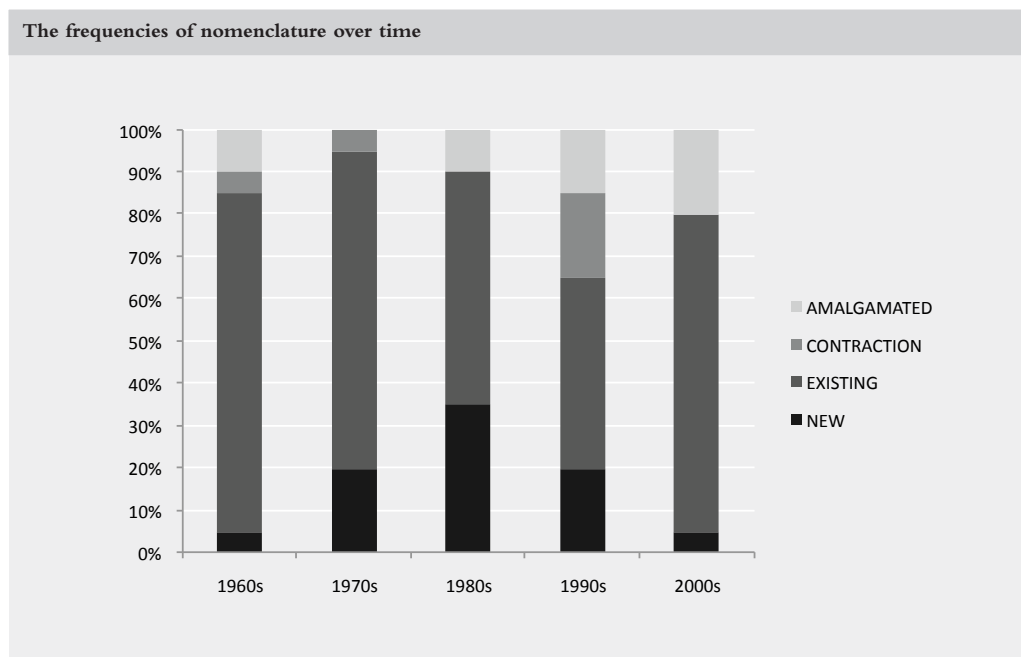
Figure 5·16. Title: The status of nomenclature.

The typical retention of existing names – and derivatives of existing names – indicates the organisational inclination to preserve as much brand equity as possible. Whilst new nomenclature was typically the domain of new, unknown organisations, there were cases where established organisations with existing nomenclature adopted entirely new names, thereby removing – or in some cases displacing – brand associations. In one particular case a name change was used as a means of distancing the organisation from a restrictive

association with a specific product. Following an expansion to the food and beverage sectors Philip Morris had diversified beyond the name's strong association with tobacco. The organisation, therefore, decided that the Philip Morris nomenclature should be retained as a product-specific tobacco brand but was no longer appropriate as the name of the parent company, and introduced an entirely new name – Altria.

In further contrast to the typical activity of retaining existing nomenclature, there were other cases where existing organisations had merged and decided against using amalgamated forms of former nomenclature. When British Steel merged with the Dutch steel producer Koninklijke Hoogovens there was an apparent 'stigma' attached to British Steel, which was perceived as in need of a new identity 'to move it [British Steel] away from being seen just as a steel company to an industrial group,' according to Enterprise IG's Managing Creative Director, Franco Bonadio (Design Week, 1999: 3). The merged organisation selected a new name that made no reference to 'what' the company did but, instead, was suggestive of 'how' they were a galvanized and unified organisation.

The emerging pattern regarding new nomenclature was that organisations develop new names for one of three reasons: first, as an outcome of a new organisation with no existing nomenclature; second, as a consequence of a merger or acquisition activity, where the new organisation seeks to signal a new vision or a unifying idea that expresses a common denominator for a diversified organisation; and third, new names are developed as a means of distancing an organisation from a prior association, thereby presenting an opportunity to build new meaning into an abstract – empty vessel – name. However, since a high proportion of mergers result in amalgamated nomenclature, the principal driver for new nomenclature is newly formed organisations. Indeed 65 per cent of cases featuring new organisational names are the result of newly formed organisations. In the 1980s new organisational nomenclature was at its highest, largely as a result of the privatisation of the utilities sector within the UK. There were similar occurrences in the US with the government-enforced divestiture of the Bell System, leading to many new organisations within the sector, such as NYNEX (an acronym of New York New England exchange). Indeed 57 per cent of new nomenclature from the 1980s were for cases concerning privatised

utility organisations, which, given such names as National Power and British Telecom, accounted for the high number of descriptive names (43 per cent of all cases featuring new names in the 1980s).

The frequencies of nomenclature over time
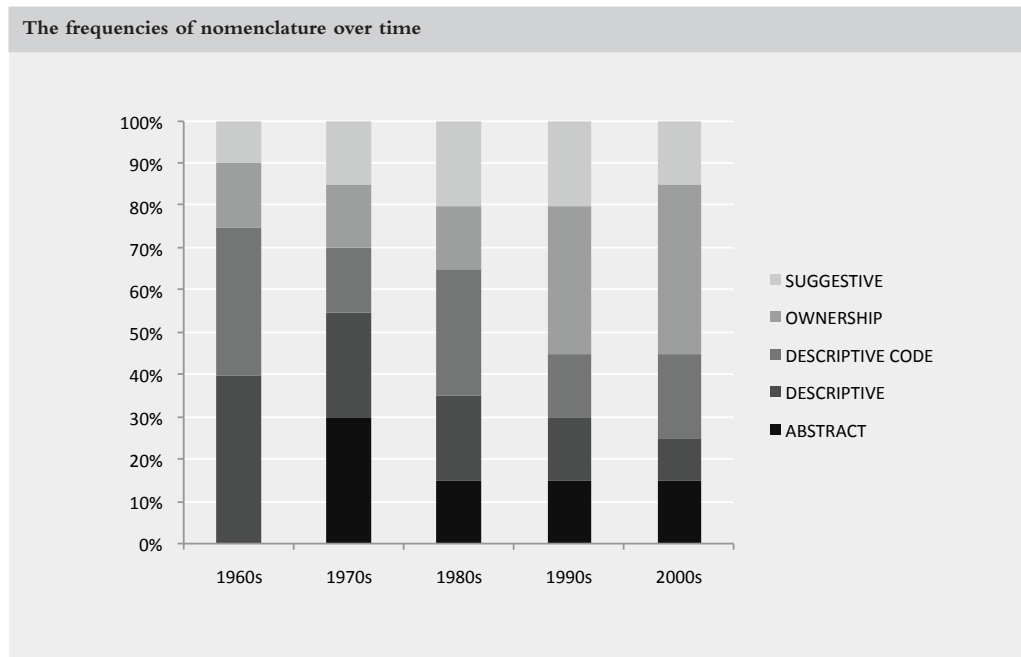
Figure 5·17. Title: The expressive domains of nomenclature.

In addition to the evolvement of the status of names, it was apparent that there had been changes in the emphasis of the expressive qualities of organisational nomenclature. One of the significant changes was the continuous decline of the use of descriptive names. In the 1960s 40 per cent of cases featured descriptive names, which dropped to 10 per cent of cases by the 2000s. Two factors appear to have led to this relative decline: first, only 29 per cent of cases involving the development of new nomenclature chose descriptive names. The second reason was that 29 per cent of organisations with existing descriptive nomenclature modified or replaced their descriptive name by either adopting a contracted form (through abbreviation or acronym) or by creating an entirely new non-descriptive name. Two cases that switched from descriptive to contracted nomenclature are BOC (formerly British Oxygen Corporation) and UBS (formerly Union Bank of Switzerland). Further examples of cases that have modified or changed previously descriptive names, albeit through different mechanisms, would be the case of Barclays Bank and the removal

of the word bank from their name in the 1999 rebranding exercise; and the case of the merger between Lloyds Bank and TSB Group, which led to a non-descriptive, amalgamated name: Lloyds TSB; similarly Kuwait Petroleum Corporation became Q8 after rebranding in 1984.

The second point of interest to emerge from the data was the increasing number of cases that had retained a founder's surname, therefore expressing both an established track record and the pride implicit in signifying ownership. In the 1960s 15 per cent of cases contained a founder's surname, which remained a constant proportion in the two subsequent decades; however, by the 1990s the figure had risen to 35 per cent of cases, which increased to 40 per cent in the subsequent decade. Behind these figures are two factors: first, during the 1960s it was predominantly large established organisations, with sufficient resources, that commissioned brand identity activity, many of whom happened to be named after the founder. The second point to note is that during the 1990s and the 2000s, when the ownership category increased, the growth in mergers activity led many organisations to form amalgamations of existing and, often, well-established nomenclature. Accordingly, there were no cases that featured new organisational nomenclature derived from ownership.

Ownership-informed nomenclature was popular during the growth of industrial activity in the 1900s, where organisational nomenclature followed a seemingly predictable pattern. In 67 per cent of the cases one or more of the following combinations informed organisational nomenclature: geographical location, activity and/or ownership. An example of geographical activity would be American Airlines or Bank of New York; an example of ownership would be PricewaterhouseCoopers or Pfizer. Over time, however, the use of geographical location and organisational activity in nomenclature became a restrictive hindrance, particularly within a global context. Ownership, nevertheless, has remained a relevant point of emphasis. Aside from the notion of ownership-informed nomenclature expressing a sense of pride originally, the long-established nature of a successful organisation typically produces a distinctive reputation. This, for the majority of cases, explains why 89 per cent of mergers retained a form of existing nomenclature, whether amalgamated or compounded.

Nevertheless 11 per cent of merged organisations chose new nomenclature. The findings from the data suggest that there are two reasons for merged organisations to opt for a new name rather than an amalgamation of existing nomenclature: either because of a restrictive association or restrictive category definition. In the merger between Guinness and Grand Metropolitan a new vision-orientated name, Diageo, was devised as mechanism to replace the former nomenclature, thereby removing the restrictive associations of the existing names with a specific beverage and hotels. In the merger between Koninklijke Hoogovens and British Steel both existing names were considered to be categorically restrictive and thus chose to adopt a new name – Corus – to represent the harmonious and galvanizing spirit of the merged organisation. In both of the aforementioned cases the existing pre-merger names were either somewhat restrictive in the scope of what they expressed or they had prior associations with specific products, which not only hindered potential diversification ambitions of the parent organisations but left the parent brands vulnerably linked to a product and/or a service.

As previously noted the data has shown that mergers do not, in the majority of cases, result in new nomenclature. Sixty-four per cent of cases featuring new nomenclature were for 'new' organisations. The term 'new' in this context accounted for two types of cases: entirely new organisations and partially new organisations. Entirely new organisations were entities that had not previously existed in any capacity; by comparison, partially new organisations were entities that had existed beforehand in some capacity but had undergone a significant restructure, often involving a change of ownership in addition to a change of name. An example of a partially new organisation would be the case of British Rail, where until 1962 the organisation was a national (state-owned) corporation known as British Transport Commission. However, in 1962 the organisation was restructured, privatised and became an independent organisation with new nomenclature.

Whilst 64 per cent of new nomenclature cases were undertaken in response to structural drivers, 18 per cent of new nomenclature cases were undertaken for strategic reasons. In these cases two issues created the need for a new name: 1) geographically or categorically restrictive nomenclature that perhaps hindered global expansion and/or diversification; and 2) limited associative nomenclature. An example of the former category would be

Q8, which was formerly known as Kuwait Petroleum Corporation but wanted a simpler name that would be more globally acceptable. An example of the latter category would be the case of Altria, where the previous name, Philip Morris, was strongly associated with tobacco, which hindered the brand's credibility in adjacent sectors. Functional drivers had a lesser influence on new nomenclature; only one case out of 17 was undertaken for functional reasons. Furthermore, this particular case was highly unusual in that there was a legal requirement (principally to increase competition within the sector) for the large organisation to divest into smaller independent organisations.
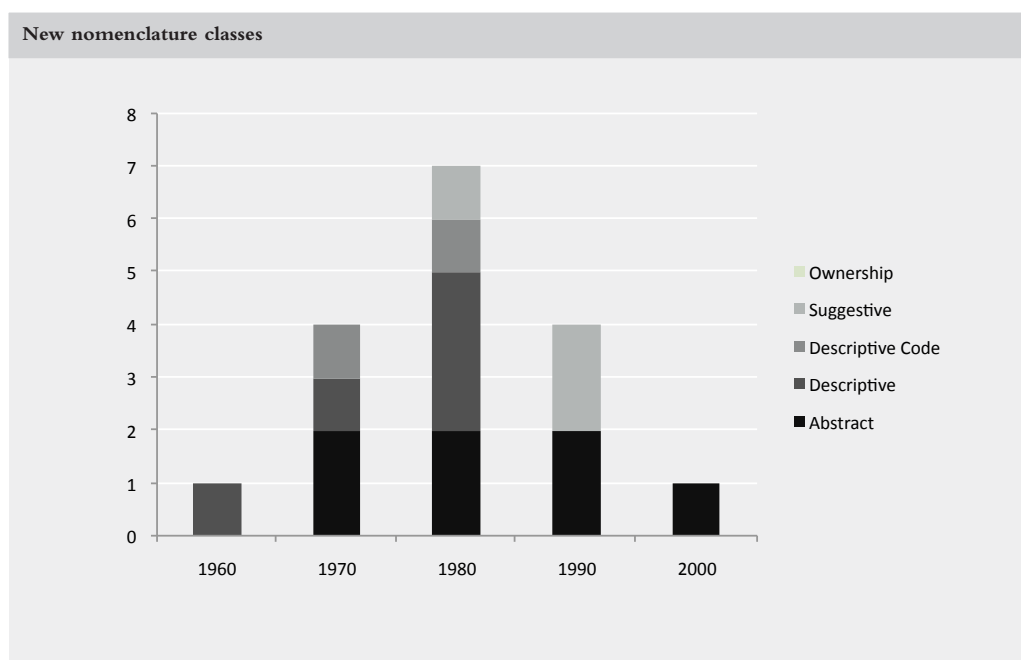
Figure 5·18. Title: New nomenclature.

In the cases that featured new nomenclature abstract names were the most frequently occurring – present in 41 per cent of the cases. This classification of nomenclature oc-curred in three distinct sectors: energy (Exxon, Chevron and Q8), technology (Next and Orange), and tobacco and beverages (Diageo and Altria). Given the nature of abstract names and their limited ability to explicitly express a clear message, they require greater investment of resources to equip the symbols with meaning; as such, they appear to be the preserve of highly profitable sectors such as energy, technology and beverages. Further-more, profitability aside, sectors such as alcoholic beverages, which have the potential to

become viewed as socially contentious, might consider the obscurity of an abstract name as a benefit. A further consideration is that, in recognition of the apparent lack of available English words eligible for registration, abstract nomenclature offers more potential for legal protection.

The second most frequently occurring category of new nomenclature was descriptive names, with 29 per cent of all cases, featuring new nomenclature, having this type of expression. These descriptive cases, however, only occurred in the earlier decades of the 1960s, 1970s and 1980s. In the subsequent decades there were no occurrences of cases featuring new descriptive nomenclature. Furthermore, 60 per cent of the descriptive nomenclature cases were for the privatised utilities sector.

The third most frequently occurring category of new nomenclature was suggestive names, with 18 per cent of all new nomenclature cases featuring a suggestive organisational name. Two of the three cases used suggestive nomenclature to express organisational qualities, such as Lucent's qualities of 'energy, innovation, and entrepreneurial spirit'. The limitations of new nomenclature, prevalent during the late 1980s and early 1990s, was encapsulated by the thoughts of Franco Bonadio, a lead consultant who worked on the Corus case: 'The name will help them [British Steel] move away from traditional thinking to a more service-oriented organisation' (Design Week, 1999). Whilst the two previous cases expressed organisational qualities, a third case from the new nomenclature category placed greater emphasis on the expression of the service benefit. First Direct's point-of-difference nomenclature was primarily consumer-orientated, whereas the Lucent and Corus cases were directed towards a corporate audience.

Only 12 per cent of cases featuring new names were categorised as descriptive code, all of which were developed in the 1970s and 1980s. For instance, the case for Amtrak, a part-nationalisation of the US rail network, was considered to be descriptive code (as the name was a contracted derivative of the descriptive term American Track). Nomenclature classified as descriptive code was typically derived from existing descriptive names but were contracted to reduce the limitations of the description. In the cases from the 1990s onwards there were no occurrences of descriptive code in new nomenclature.

5·6   The drivers of brand identity activity over time

Corporate brand identity, with its substantial costs, intrinsic complexity, and associated risks, is an activity mostly driven by necessity. The dynamic environment of management, with frequent changes in ownership and strategy, creates a genuine need for organisations to express such changes through their brand identity. In the analysis of the reasons that drove organisations to undertake such activity, reference is made to the primary categories of functional, structural and strategic drivers, as discussed in section 3·6. The emergence of these drivers, along with their sub-category descriptions, is offered below. The subsequent discussion explores how these drivers of activity have changed over time.

In the cases that featured functional drivers, two types of driver emerged. The first type of functional driver related to cases that were undertaken to address design weaknesses in the visual manifestation. An extract from the following case provides a suitable illustration of such a driver: 'Westinghouse was a huge corporation with plants and offices throughout the world. Its antique logo was originated at the turn-of-the-century by founder George Westinghouse … and although it had been updated, none of the iterations were any more modern than the original' (Heller, 2000).

The second type of functional driver related to cases that were undertaken for legislative reasons. An extract from the following case study provides a suitable illustration of such a driver: 'In 1911 the US Supreme Court ordered the dissolution of the Standard Oil Trust, resulting in the spin-off of 33 companies' (ExxonMobil, 2010). One of those companies, Standard Oil (New Jersey), adopted a name based on the phonetic version of its initials (SO = Esso). However, after being designated as the company name, the use of the Esso trademark faced legal restrictions in the US; therefore Standard Oil (New Jersey) devised a new organisational name: Exxon (ExxonMobil, 2010).

In the cases that featured structural drivers, three types of driver emerged: first, there were cases where the organisation was entirely new and, therefore, had no existing name; second, there were cases where an existing organisation had been restructured and had undergone significant organisational change; and third, there were cases where an organi-

sation had undergone structural change as a result of either a merger or an acquisition (or several acquisitions).

In the cases that featured strategic drivers, three types of driver emerged. The first type of strategic driver related to organisations that engaged in brand activity to consolidate a portfolio of separate identities into a single monolithic identity, referred to as strategic driver 1. An extract from the Repsol case study provides a suitable illustration of such a driver: 'In the mid 1980s the major oil companies had their eyes on Spain, the last major western European market to open up. Spain's domestic player was a heterogeneous collection of oil companies, and needed to assert itself against its new global rivals' (Wolff Olins, 2009d).

The second type of strategic driver related to organisations that engaged in brand activity to address a misalignment – or gap – between the design expression and the actual organisational competencies and capabilities, referred to as strategic driver 2. An extract from a consultancy case provides a suitable illustration of such a driver: 'To reflect Amazon.com's brand and its relationship with its more than 16 million customers better, the familiar logo was changed to communicate the company's mission of being the most customer-centric company in the world, most notably by depicting the ultimate expression of customer satisfaction: a smile. Instead of a downward curve underlining Amazon.com, a smile now begins under the 'a' and ends with a dimple under the 'z', emphasizing that Amazon.com offers anything, from A to Z, that customers may be looking to buy online' (Business Wire, 2000).

The third type of strategic driver related to organisations that engaged in brand activity to address a misalignment between the external perception of an organisation and the actual organisational competencies and capabilities, referred to as strategic driver 3. An extract from a consultancy case provides a suitable illustration of such a driver: 'BT needed to be recognised as the innovative, service-oriented, and world-class company it was becoming; however, both its image and culture were inconsistent with its vision of becoming a major player. BT was still perceived as unresponsive, bureaucratic and unsophisticated. To succeed internationally BT also had to make a break with its UK origins' (Wolff Olins, 2002).

Following the classification of the drivers that emerged from the cases, the analysis of the findings indicated a distinct transition from functional drivers to the more strategic drivers (detailed in figure 5·20). In the 1960s 75 per cent of cases were undertaken in response to functional drivers, dropping to 70 per cent of cases in the subsequent decade in the 1970s. The dominance of functional drivers appeared to be a reflection of the preoccupation on visual manifestations by the brand identity designers at that time, mostly graphic designers (this is discussed in more detail in the final part of this section). Nevertheless, by the 1980s the proportion of cases undertaken in response to functional drivers had substantially fallen to 25 per cent, and 10 per cent in the 1990s. By the 2000s, there were no cases that had been initiated for functional reasons.

The drivers of organisational brand identity over time
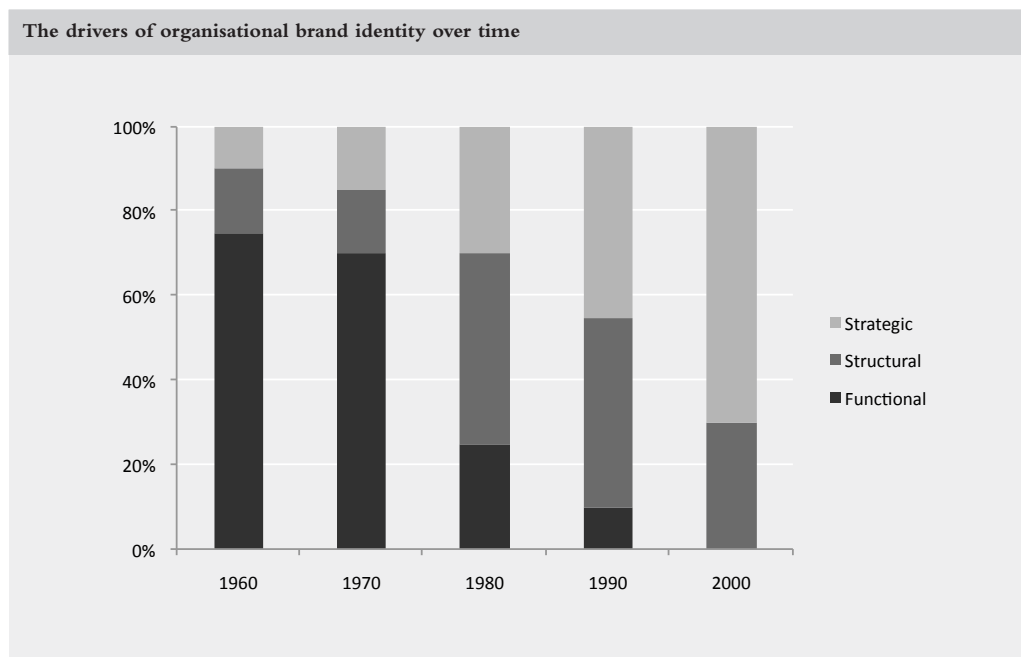
Figure 5·19. Title: Frequency of drivers.

In contrast to the decreasing occurrence of functional drivers, strategic drivers increased over time. In the 1960s only 10 per cent of cases were initiated for strategic reasons; however, this figure rose to 15 per cent of all cases during the 1970s, and by the 1980s there was a twofold increase in strategic drivers, rising to 30 per cent of cases. This rise in the occurrence of strategic drivers during the 1980s was influenced by three similar cases – Akzo, Repsol and United Technologies. These large, acquisitive organisations sought to

rationalise their disparate brand portfolios into a consolidated identity. In the subsequent decade, the 1990s, the occurrence of strategic drivers increased to 45 per cent of cases, with 55 per cent of these drivers consisting of a design–reality misalignment (SD2). By the 2000s 70 per cent of cases were driven by strategic issues, with 86 per cent of these cases consisting of SD2s.
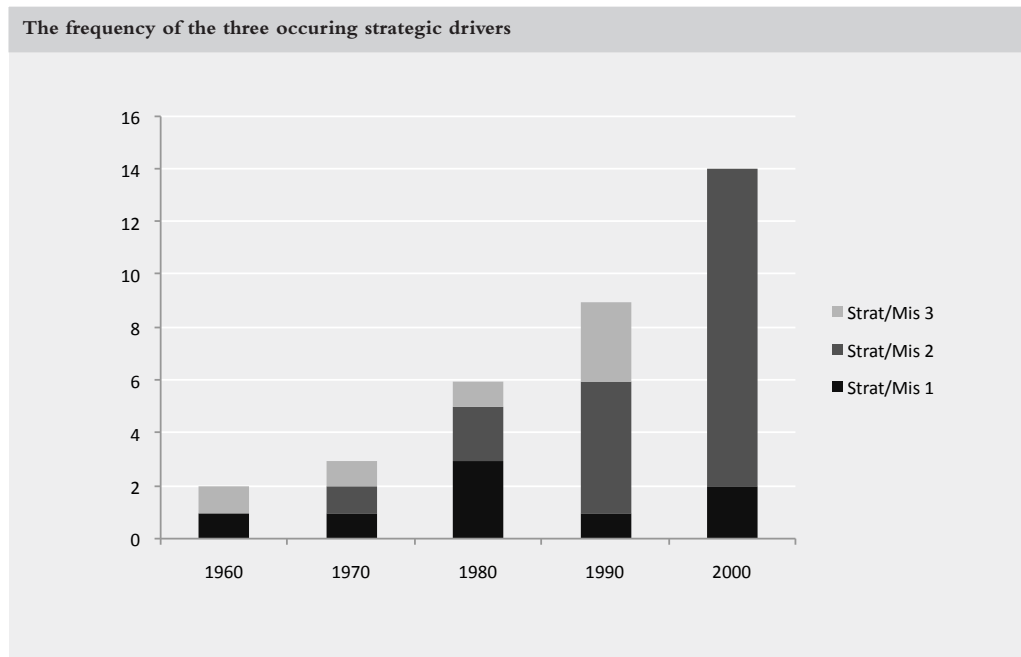
Figure 5·20. Title: Classes of strategic drivers.

Of the three types of strategic driver SD2s were the most frequently occurring. This driver accounted for 59 per cent of all cases from the entire sample of cases that featured strategic drivers. However, this type of strategic driver was most prevalent during the 1990s and 2000s, as many large organisations faced significant challenges relating to globalisation and technological developments, creating a need for organisations to signify such capabilities through their brand identity. The second most frequently occurring strategic driver was SD1, which refers to the consolidation of multiple identities into a singular monolithic identity, this occurred in 24 per cent of all cases that featured strategic drivers. The least frequent strategic driver was SD3, which refers to the perception–reality misalignment, and was present in 18 per cent of cases driven by strategic intentions. A further point of interest emerged from the 1990s, where three cases featured a SD3: the

commonality was that these organisations used their visual brand identity to address a negative perception of the organisation, whereas in the cases from the 2000s there were no occurrences of SD3s. A possible explanation for this could be that negative perceptions were addressed through other forms of organisational communication, or, alternatively, that organisations made a greater proactive effort to manage stakeholder perceptions.

In addition to the strategic drivers there was an increased occurrence of structural drivers in the later decades. In the 1960s and 1970s structural drivers were relatively low occurrences, with only 15 per cent of cases, in both decades, being initiated in response to structural change. However, in the cases from the 1980s the occurrence of structural drivers increased to 45 per cent of activity, with 66·6 per cent of the structurally-driven cases being for new organisations – mostly as a result of the privatisation of the utilities sector in the UK and the US. By the 1990s structural drivers were present in 45 per cent of all cases, of which mergers and acquisitions activity accounted for 77·7 per cent of the cases. The 2000s saw a slight decline from seven cases to six cases undertaken in response to structural drivers, all of which were the result of M&A activity. Surprisingly, there were no occurrences of cases initiated for new organisations.

The frequency of the three occuring structural drivers

Legend:
- Struct (restruct
- Struct (new)
- Struct (M&A)
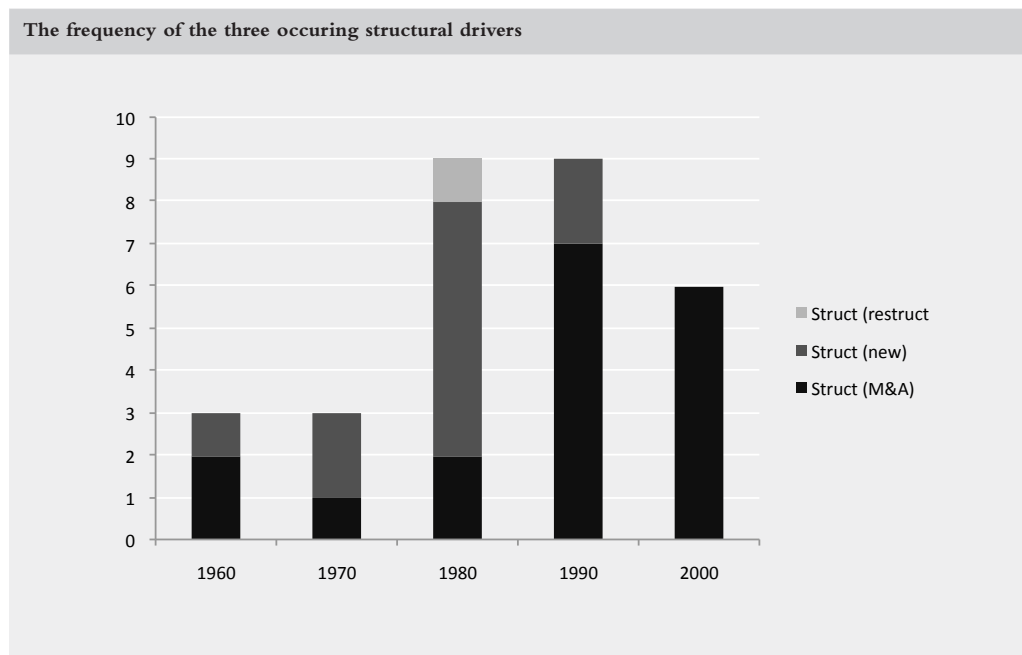
Figure 5·21. Title: Classes of structural drivers.

These transformations in the drivers of brand activity are partly a reflection of the substantial changes in the providers of brand consultancy services. In the 1960s, 90 per cent of identity consultants were essentially graphic design practitioners, who mostly prioritised the visible manifestations of organisations. Consequently the principal reason for undertaking brand activity during this early period was to achieve a more consistent set of visual manifestations. A case extract provides a suitable illustration of such intentions: When the graphic designer F.H.K. Henrion was asked to provide a framework to promote the KLM brand, it was stated that the house-style 'should be consistent and uniform, instantly recognisable everywhere in all its visual manifestations, communicating the image of a reliable airline' (Wells, 1990). Brand identity programmes were typically initiated in response to inadequate design manifestations – either in the application or the expression – thereby increasing the occurrence of the functional driver.

The providers of identity counsel over time
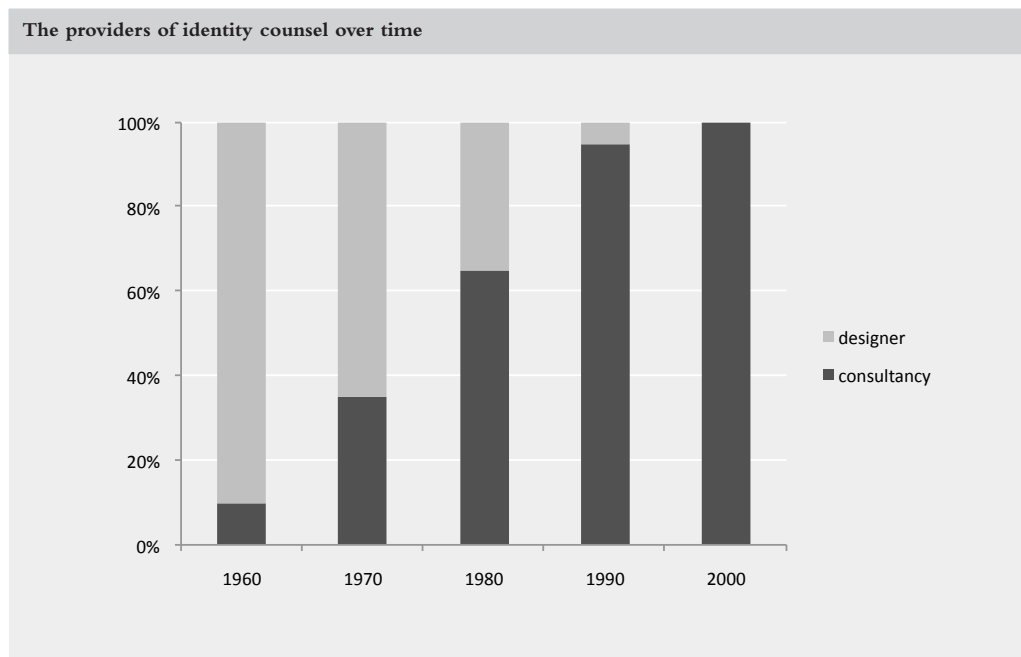
Figure 5·22. Title: Identity counsel providers.

Graphic design practitioners continued to be responsible for 65 per cent of the cases during the 1970s; this figure declined in subsequent decades until there were no occurrences in the cases from the 2000s. The decline in graphic designers providing identity counsel correlated with the decline of the functional driver, which further reflects the shift

of emphasis from the superficial presentation of a brand identity to a more strategically orientated focus on brand architecture and brand management. Specialist brand consultancies, with their greater range of expertise and broader set of capabilities, were better equipped than graphic design agencies to undertake complex strategic branding issues. The necessity for organisations to achieve brand alignment across all facets of their brand touchpoints led to an environment where only specialist consultancies had the capability of providing a total package of services. Consequently, by the 1990s specialist brand consultancies were responsible for 95 per cent of all cases in the sample, and 100 per cent of cases in the subsequent decade.

5·7   The changes in brand identity activity, by sector.

In addition to the aforementioned changes in brand identity activity there were further observations relating to the organisational sectors in the sample used throughout this research. In the majority of the cases (90 per cent) the brand activity was for large organisations from typically profitable sectors. These consisted of the finance sector, which accounted for 20 per cent of the sampled activity; 16 per cent of the captured activity was for large organisations operating in general industrial sectors, such as British Steel and the mining organisation Rio Tinto; the airline industry – combined with the transportation industry – accounted for 11 per cent of the activity, while the energy sector (limited to oil refining organisations) accounted for 9 per cent of the activity. Whilst the profitability of a sector was not a criterion in the sampling, the inevitable costs involved in implementing the changes of such large-scale branding activity naturally created a predisposition for highly profitable sectors.

Nevertheless, despite the profitability of the aforementioned sectors the activity occurred inconsistently. The research revealed that a large amount of the brand activity was clustered around intense periods of rivalry or contextual change, such as in response to economical, political, social, and technological change. For instance, many of the cases from the utilities sector occurred in the 1980s – a period when many of the services were privatised in an effort to promote greater market competition for utilities services. Simi-

larly, around the late 1980s and early 1990s the conditions of globalisation, along with the expansion of the world wide web, led many organisations to reconsider the appeal of their brand expressions to a much broader audience. Furthermore, the consolidation phase of a business cycle can intensify the brand activity of a sector through the increase of mergers and acquisitions. Such contextual events inevitably have an impact on the frequency of activity within a given sector. (The absolute frequencies of activity according to sector are presented within Table 5·1.)

The sector frequency in the (sectors with fewer than five cases were placed into miscellaneous).						
	1960S	1970S	1980S	1990S	2000S	TOTAL
ENERGY	2	3	3	0	1	9
FINANCIAL	2	5	4	6	3	20
FMCG	0	1	0	1	3	5
INDUSTRY	5	3	5	2	1	16
MISCELLANEOUS	1	3	0	3	3	10
PHARMACEUTICAL	0	0	1	2	3	6
PROF. SERVICES	1	0	1	1	2	5
TECHNOLOGY	3	2	1	1	2	9
TRANSPORT	5	3	0	2	1	11
UTILITIES	1	0	5	2	1	9
TOTAL	20	20	20	20	20	100

Table 5·2. Title: Sector frequencies.

In classifying the brand activity by sector, any sector that occurred more than five times – equivalent to one per decade – became an independent sector, whereas any sector that occurred fewer than five times became categorised collectively into the 'miscellaneous' category. Whilst the majority of the cases were categorically obvious, the energy sector needed a clearer distinction in the boundary description. In this particular sector two types of cases occurred that qualified as energy organisations: ones that principally refine and derive products from crude oil, and ones that supply power – essentially electricity and gas to consumers. Both types of organisation operate in the energy industry, yet they differ greatly in terms of the industry competition and the consumers they serve. Therefore the cases for the organisations that supplied consumers with domestic power, as opposed to creating crude oil derivatives, were classified in the 'utilities' sector, whereas the oil organisations were classified in the 'energy' sector. Brand consultancies often group these two types of organisation together by the term 'energy and utilities'; however this

approach would have led to a problematic classification of incomparable organisations, placing telecommunications providers and water providers alongside organisations that refine crude oil and domestic energy suppliers.

The energy sector seemed a frequent commissioner of brand identity services, with nine cases featuring activity for oil organisations. In earlier cases from the 1960s and 1970s the visual manifestations appeared more abstract and unrelated in their references to energy. Cases such as Chevron and Exxon contained no explicit references to their activity, whereas cases from later periods (BP, Repsol and Q8) all contained direct references to energy. The Q8 symbol contains a depiction of sail booms to suggest both the geographical origin (Kuwaiti pearl-fishers) and the notion of harnessing energy. The Repsol symbol contains a literal depiction of the sun, which, similarly, acts as a reference to origin (sunny Spain) and the ultimate power source. The BP symbol (2000) contains an abstract representation of the sun, which is named after the Greek God of sun, Helios. This occurrence of the 'what' pivot within the energy sector was relatively high. Indeed the most surprising finding was that the 'where' pivot occurred the same number of times as the 'what' pivot.

Furthermore, the pattern of pivots in the cases from the energy sector corresponded with the pattern of pivots from the entire sample, whereby the cases from the later decades expressed a greater range of pivots. This was apparent in the frequency of pivots per case over the five decades: there was a ratio of 2 pivots per case in the 1960s, followed by a decline to 1 pivot per case in the 1970s; there was a subsequent rise to 3 pivots per case in the 1980s, followed by no cases in the 1990s; the ratio increased to 4 pivots per case in the 2000s. The 'what' pivot and the 'where' pivot were the most frequently occurring pivots in the cases from the energy sector.

It was evident that the range of pivots in the utilities sector increased over time. Only a single case from this sector occurred in the 1960s and contained two pivots. In the 1980s, when there were five cases, the ratio of pivots per case had increased to 2·2; this subsequently increased to 3·5 in the 1990s, followed by a ratio of 4 in the 2000s. This high ratio was partly affected by the high number of descriptive names in the sector, with names

such as National Power, National Grid, and British Telecom. Such descriptive nomen-clature generated a large number of 'what' pivots: eight cases out of nine featured a 'what' pivot.

This seemingly natural progression of increasingly expressive brand identities was further reflected in the cases located in the financial sector. In the 1960s the ratio of pivots to cases was 2·5; the subsequent decade saw this decline slightly to 2·4, and then increase in line with the two previous sectors to 2·5, 2·8 and 3·3 respectively in the subsequent decades. Whilst 56 per cent of cases contained a descriptive name (the term 'bank' was re-current) there were numerous visual references to security, such as the UBS keys, thereby increasing the occurrence of 'what' pivots. However, this large ratio of pivots was equally influenced by the relatively large number of 'how' pivots, where 60 per cent of cases from this sector exhibited the pivot. In the case for Merrill Lynch the only pivot present – other than 'who' pivot – was the 'how' pivot, which was expressed through the robust and authoritative logotype. This expression of organisational attitude was further reinforced through the assertive stance of the quasi-heraldic symbol of the 'passant guardant' black bull. Similarly, the case for CitiCorp had an italicized, uppercase logotype that conveyed the concept of dynamism and dominance, which was further reinforced through the sym-bol of the compass rose – a signifier of geographical exploration and the aspiration of be-ing a global institution.

In contrast to the highly expressive sectors the 'industry' sector was the least expressive. In the 1960s the ratio of pivots to cases was 1·6, which subsequently declined to 1·3 in the 1970s. This ratio increased to 1·8 in the 1980s and subsequently peaked at 2 pivots per case in the 1990s; in the final decade the ratio declined to 1 pivot per case. The most frequently occurring pivot, disregarding the 'who' pivot, was the 'how' pivot, which was present in 38 per cent of cases from this sector. The 'what' pivots declined within this sector, while the 'how' pivots increased. In two specific cases there was a change from descriptive no-menclature to suggestive nomenclature: British Steel became known as Corus, and Brit-ish Oxygen Company became known as BOC. Furthermore, there was an occurrence of two cases from the 1960s where organisational expression focused on the articulation of organisational attitude: in the documentation from the case of BOC the organisation

wanted to be known as 'confident and aggressive' (Wolff Olins, 2009e). Similarly, in the documentation from the case of Hadfields' Paints, the consultancy responsible for the activity intended to portray the organisation as a 'firm living by its wits' (Design, 1969).

The consultancy responsible for the aforementioned cases was responsible for six of the 16 cases from this sector, four of which contained the 'who' and 'how' pivots. The occurrence of this combination of pivots, however, was not isolated to the 'industry' sector; throughout the sample of cases an analysis of the occurrence of 'who' and 'how' ratio shows a similarity across all of the large brand consultancies irrespective of the sector (see Table 5·1). Furthermore, it was apparent that this consultancy had a track record in undertaking brand identity programmes for organisations located in the 'industry' sector, much the same as the other consultancies that had credible track records in specific sectors. In addition to the 'industry' specific sector experience, the same consultancy was responsible for the majority of the cases used throughout the study – purely as a result of the consultancy having consistently produced identity programmes over the entire five decades and therefore was responsible for a higher proportion of the cases used to generate the data.

5·8   Summary

The analysis of data presented in this chapter has provided a clear indication of a shift in the strategic expression of the visual manifestations of corporate brand identities. Throughout the analysis of cases there has been a tendency for the visual manifestations of organisational brands to move beyond being mere devices of identification, and becoming more complex expressions of organisational strategy. Such changes were apparent in the decline of the functional pivots relative to the increase in the prevalence of the strategic pivots. The strategic pivots, however, did not substitute the functional pivots because the absolute frequencies of the functional pivots remained consistent over time. More precisely, the increase in the strategic pivots provided supplementary expressions and, therefore, corporate brand marks progressively conveyed a greater range of pivots.

In addition to the progressively expressive brand marks, there was an emerging efficiency in the visual depiction of the pivots: in earlier cases (1960 − 1980) there was a greater prevalence of cases containing multiple devices that expressed the same pivot, whereas in later cases such tautological expressions had substantially declined. This graphic economy was accompanied by a linguistic efficiency: there was a decline in the occurrence of descriptive nomenclature for established organisations – already known for their activities – in the more recent cases from the 1990s and 2000s. Furthermore, several cases revealed an intentional modification of descriptive nomenclature, such as geographical scope or areas of activity, was undertaken as a means of removing restrictive associations.

The transition from the notion of brand identity as a functional device to a strategic device was further reflected in the drivers of branding activity. In earlier cases the activity was mostly driven by functional needs, with the prime purpose being to achieve visual consistency, whilst later cases were mostly driven by structural and strategic reasons. As time progressed there was a realisation that brand identity encompassed a much broader and influential organisational role. Accordingly, such change in the drivers of activity, along with the increased recognition of the importance of brand identity, was reflected in the providers of identity counsel. In the majority of earlier cases the providers of identity counsel were visually orientated graphic designers, whereas in the later cases the counsel was provided by specialist brand consultancies that were better able to provide a range of strategic brand-related services.

Whilst the conceptual framework captured the majority of the expressions from the sample, five of the cases contained attributes that could not be accommodated by the framework. All five cases of brand activity were for diversified organisations. In these cases the organisations were unable to articulate a specific area of operation, and thus the visual expression focussed on concepts that presented a linkage – a common denominator – across the range of organisational activities. In addition to moving the visual expression from specific categories to more abstract substantive categories, these cases exhibited a tendency to express the collective benefit of organisational activities.

The aforementioned changes in brand identity activity, and, in particular, the emergence of cases that could not be accommodated by the conceptual framework, provided a definite direction for phase two of the research, which is explored further in the subsequent chapter.

6   Method II: Interpretation of the interview data

6·1   Introduction

The direction of the second stage of the research was informed by the findings from the analysis of archival data, where a number of theoretical issues emerged that warranted further investigation. In addressing these issues eight cases were identified that offered greater potential for gaining insight into the dimensions of strategic brand mark expressions. More specifically, deeper explanations were sought regarding the specific factors that influenced the primary brand expression(s) from the sample of cases. Accordingly explanations were sought through the generation of semi-structured interview data from the actors directly responsible for the construction of these symbols – the creative directors and strategy consultants responsible for the selected cases (see Table 6·1).

Theoretical sampling was orientated around three issues. The first issue was connected to exploring, in greater detail, the expressive intentions of the cases that could not be accommodated by the conceptual framework. The second point of interest was in developing a more detailed explanation of what factors influenced the expression of organisational activity. The third point was concerned with discovering what factors influenced the expression of organisational attitude. In addition to better understanding the factors that influenced the key expressions of brand marks, there were a number of points in need of further clarification regarding the intended expressions from three of the five deviant cases that emerged from the analysis of archival data.

Case	Actor	Position, Consultancy and Location
Altria	Lee Arters	Creative Director, Landor Associates, New York (2003)
Cearns & Brown	Lee Coomber	Creative Director, Wolff Olins, London (1997)
Diageo	Lee Coomber	Creative Director, Wolff Olins, London (1998)
GSK	Paul Barlow	Creative Director, FutureBrand, London (2000)
GSK	David Grainger	Senior Vice President, FutureBrand, London (2000)
Klöckner & Co.	Lee Coomber	Creative Director, Wolff Olins, London (2000)
Orange	Robbie Laughton	Creative Director, Wolff Olins, London (1994)
Orange	Rob Fox	Brand Strategist, Wolff Olins, Dubai (1994)
Smith & Nephew	Bethany Koby	Creative Director, Wolff Olins, London (2003)
Unilever	Lee Coomber	Creative Director, Wolff Olins, London (2004)
Unilever	Miles Newlyn	Design Consultant, London (2004)

Table 6·1. Title: The actors responsible for the strategic expression of the selected cases.

The sampling was determined by the aforementioned theoretical issues, thus cases were selected for their ability to provide rich explanations to these issues. Expositions were sought for the five outlier cases that emerged from the archival analysis. These cases were similar in that all of the organisations were diversified, and therefore the related issue connected to these cases was the difficulty of encapsulating an appropriate expression for such diverse organisations. From the archival analysis it became apparent that there was a typical attempt for the organisations to visually express a link between their various activities, which warranted a deeper interrogation of the circumstances around each case with the appropriate actors. Alongside the intrinsic appeal of thoroughly understanding these deviant cases, there were plausible interpretations of specific brand marks that had the potential to reveal novel organisational expressions, which therefore needed actual clarification from the respective creators.

In relation to the second point of interest two cases were identified as being distinctive for their activity expression. Cearns & Brown was selected because the case featured an atypical expression for an organisation with such credentials: despite being a well-established organisation their brand mark prioritised the explicit depiction of its specific activity. This differed from the norm, where activity expressions were typically used by new organisations, and, commonly, expressed through descriptive nomenclature. The second case, for

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Klöckner & Co., was selected because its primary expression focused on what it considered to be the added-value of its organisational activity. This was presented alongside a descriptive strapline that explicitly stated the actual organisational activity. Therefore this case conveyed its activity in a way that extended beyond category definition and attempted to achieve a more competitive activity expression. In relation to the overall sample of cases, this was a seemingly unusual strategy.

Expression	Theoretical issues	Cases for exploration
Diversified Encapsulations	Clarification of intended expressions.	Altria
	Portfolio alignment/summary: Why?	Diageo
	Clarification of intended expressions: Why?	GSK
	Benefit/impact orientated expressions: Why?	Smith & Nephew
	Purpose expression: Why?	Unilever
Signifying Activity	The emphasized activity expression for established organisations. Why?	Cearns & Brown Klöckner & Co.
	Activity expression: Why?	Unilever
	Removal of category signifier; Why?	Smith & Nephew
	Activity-related expression; audience perceptions.	Altria
Signifying Attitude	The emphasized attitude expression for a new/ merged organisation: Why?	Orange
	Expression of ethical values/endorsement model	GSK
	Expression of ethical values	Unilever

Table 6·2. Title: An outline of theoretical issues to be explored in research phase II.

In addition to these two cases three outliers were included in the analysis of activity expressions. First, the Unilever case provided a particular point of interest because it was highly unusual – and seemingly implausible – for a diversified organisation to signify such an array of organisational activities. Second, the Smith & Nephew case was of interest because the organisation removed its existing medicinal category signifier from its new brand identity. Therefore this case provided a different perspective on activity expressions: the factors that render such expressions to be regarded as unnecessary. Third, the case for Altria was included in the analysis of activity expressions because it used an expression that was intended to signify a change in organisational activity but without directly expressing any specific message regarding their specific activities.

The third point of interest related to three cases that expressed organisational attitude. The case for Orange was selected for two reasons: first, organisational attitude was prioritised as the key expression and was reinforced through colour and nomenclature. Unlike other new organisations that often use descriptive nomenclature or symbolic indication of the category of activity, Orange prioritised the projection of organisational values. The Orange case featured circumstances extended beyond the norm, and thus provided the opportunity to gain unique explanations behind the choice of its brand expression. The second reason for the selection of the Orange case was that there was a metaphorical interpretation of the colour orange, which potentially related to a signifier of activity; this, therefore, needed greater clarification regarding the intended expression.

GlaxoSmithKline (GSK) was the second case selected for the expression of organisational values. Aside from its features as an outlier, GSK was an unusual case in that it was a large pharmaceutical organisation that sought to project attitude rather than activity – which was atypical within its industry. Unilever was the third case to be selected for the ability of its brand identity to integrate the expression of attitude with the expression of activities alongside its organisational purpose. Each of the three cases had sufficient organisational and contextual contrast to potentially reveal a greater cumulative explanation of the factors that influenced the expression of organisational attitude.

The discussion of findings in this chapter is arranged around the three points of theoretical interest: portfolio encapsulations, activity depictions, and value expressions. Within this configuration attention is directed towards the factors within each case that influenced the visual expressions. Whilst the discussion refrains from providing a case-by-case account, the significant dimensions of each case are briefly outlined in the discussion, in terms of the antecedents, primary stakeholders and market conditions. Such dimensions help to situate the data within its context and provide a mechanism for revealing the influential determinants that informed the prioritisation of visual expressions in brand marks. Furthermore, by discussing the circumstances around the subset of cases, the link between the data and the interpretations of that data is made transparent.

Within the aforementioned structure the findings are discussed in the subset configuration (as detailed in Table 6·2), where the comparative and contrastive features of the cases are discussed in relation to the emerging theoretical explanations. The subsequent section considers these interconnections between cases and moves towards the formation of an explanatory framework of brand mark expressions. This theoretical development is examined within the context of the literature, so as to clarify the original contribution of the research. Further explication of this original contribution can be found in the final chapter of this thesis.

6·2   Explanations of aspirational expressions

The four following cases featured expressions of organisational purpose in their brand marks. The interpretation of the interview data relating to each of these cases is discussed around the four dimensions that underpinned each case: i) situation, ii) audience, iii) appeal, and iv) expressions.

Diageo's situation and their brand audiences

Following the £24bn merger of Grand Metropolitan plc and Guinness plc in 1997 Diageo became the name of the new organisation (Financial Times, 1997). Both of the previous organisations had established reputations: Grand Metropolitan was a renowned owner of hotels (Grand Hotels and Intercontinental Hotels) that had diversified into many business: from beverages (Smirnoff Vodka, Bailey's Irish Cream and Bell's scotch whisky) and fast foods (Burger King) to the bookmaker, William Hill (Salter, 2004; William Hill, 2013). Meanwhile Guinness, aside from being a famous beverage brand, was the owner of numerous liquor brands (Johnnie Walker scotch whisky, Red Stripe lager and Gordon's Gin) (Salter, 2004).

> *Lee Coomber: "So Diageo … their main issue was the coming together of Guinness and Grand Metropolitan, and those two organisations had very strong cultures and heritage … Guinness to the point of being religious in its own way. Guinness is a portfolio of brands itself, but the Guinness organisation, with its history, meant that it had a really strong*

culture. Grand Met was effectively the buyer, although these things are always said it's a merger; in fact there's always a buyer. And that's Grand Metropolitan. So the issues for both of those businesses actually … how do we make this thing work. We need to get people to understand that they're working for a new thing, not two old things … who are happening to work together."

A key audience of this branding activity was Diageo's own staff. In the creative director's recollection of the case it was apparent that considerable importance was placed on the integration of the two 'very strong' organisational cultures, one of which he described as 'religious'. Given the two 'strong cultures' there seemed to be a suggestion that the compounding of existing nomenclature – common practice in brand identities driven by merging organisations, as a means of retaining the existing brand equity of the former organisations – would have been ineffective in making 'people understand that they're working for a new thing, not two old things'. The potential threat of failing to gain the buy-in of internal stakeholders was a key issue and a key determinant in the choice of adopting new nomenclature and, consequently, a new identity.

For Grand Met and Guinness, both well-established, the adoption of new nomenclature could have been seen as a means of disregarding favourable brand equity. However, the consumers of Diageo's products have a relationship with the product brands, whereas Diageo was a holding company; therefore Diageo's primary external audience was the financial community, whose interest was in understanding the synergies of the merged entity. In this respect a new identity was considered to be a better mechanism to project a unified purpose – something that would appeal to the financial community – and, simultaneously, signify organisational change to the staff that they are 'working for a new thing'. Nevertheless, despite the reasoning, a new identity inevitably introduced particular complexities, as the creative director proceeded to explain.

Coomber: "And then of course you run into a number of practical issues, one of course you've got to come up with a new name. And that period of the '90s I think just about every real word had probably gone at that point, and Diageo's issue was that they had to register in at least 108 countries. So that put some pragmatic things around the naming

process. The name itself is a sort of a Greek-Roman hybrid of 'world' and 'day' or 'day' and 'world': 'dia' and 'geo'."

"And that's quite an idiosyncratic name, understood that that's going to take a while to get known. And also that tied in with their corporate … if you like … positioning … or statement, which was around 'everyday pleasures everywhere', right? Therefore what does the symbol in that sense need to do? And in their sense … in a way it's to put some structure around the group and the portfolio. There's a couple of things in the portfolio that, in truth, didn't really sit and they were quite clear that they were going to be a drinks business."

Alongside the usual complexities of creating new nomenclature, there was recognition that, with such a limited pool of legally available words, the new name would have to be an invented name. In this sense the creative director reinforced the difficulty of the creative challenge, and legitimised the decision to opt for an invented name. This case was situated in an abundant period of brand identity activity, in which many cases featured the use of contrived corporate nomenclature. Such neologisms frequently received ridicule from the media for their seemingly meaningless expressions, an example being the Post Office's short-lived rebrand as Consignia (Telegraph, 2001). The creative director's admission that the name was quite 'idiosyncratic' upon first exposure seemed to acknowledge the view that nomenclature featuring Greek and Latin prefixes and suffixes appear more contrived. However, in contrast to the Consignia brand, which seemed to disregard the audience's affinity towards the Post Office brand, the Diageo brand name was primarily directed at the financial community.

Forming the brand expression

In a move to place Diageo's nomenclature in the domain of the meaningful, and therefore by implication receive less ridicule, the creative director explained that the 'Greek-Roman hybrid' construction, whilst somewhat awkward upon first exposure, 'tied in' with the positioning statement. Upon asking the creative director why the nomenclature was informed by the positioning statement 'everyday pleasures everywhere' the creative director replied: "That's what they [Diageo] believe their business to do." From this response it was apparent that the positioning statement was an initial mechanism for encapsulating

organisational activity; therefore, this was a concise way of summarising the group's portfolio, in terms of the nature of its brands, the common linkage between its products, and the availability of its brands.

Accordingly Diageo considers its brands to be 'everyday' products – as opposed to luxury one-off purchases – in terms of their relative expense and the frequency of consumption. The term 'pleasure' appeared to be a reference to the common consumer benefit derived from the consumption of such products. Clearly alcoholic beverages are not consumed out of necessity but consumed for the enjoyment they can bring to some consumers. The term 'everywhere' clearly signifies the geographical scope of their brands and the markets that they serve. Accordingly, the nomenclature reflected 'everyday' and 'everywhere' through the two compounds 'dia', which is regarded as meaning 'day' in Latin, and 'geo' which is regarded as meaning 'world' in Greek. Meanwhile the operative word 'pleasure' was expressed visually through the logotype.

> Jamie: "You mentioned the idea of the smiling lips, and one of the things that I have read was that it was about expressing 'pleasure'. I wondered what the thinking behind this was."

> Robbie Laughton: "Well if you think about products … when you've got a holding company it stands for nothing – at the extreme – it's something that is a business and it's about numbers … and its about making the share price strong … and it's about a story to the City. Now … so in that vacuum you have to fill it with something, and one common thing that all the kind of brands in its portfolio added up could do … when you look at some of the brands they … can be held together with the glue, which is this pleasure, which is this making lips smile. What it is … is offering people things what they want in their lives."

It was apparent from the discussion with both creative directors that there was an attempt to bound the organisation's activity into a concise form. The first creative director referred to this as to 'put structure around the group and the portfolio', as a means of framing the portfolio of brands. The second creative director referred to an attempt to aggregate the common linkages throughout the portfolio into a concise unit as 'one common thing that all the kind of brands in its portfolio added up could do'. Again, perhaps

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a reference to the nature of a holding business, the second creative director explained that the portfolio 'can be held together with the glue, which is this [concept of] pleasure'. Furthermore, this creative director alluded to the external audience's expectation of organisational synergy, when he stated that, in addition to financial performance, the identity is 'about a story to the City'. Nonetheless, the term 'pleasure' is not an encapsulation of the products themselves nor a means of signalling a category of activity, rather it is the assumed benefit that such products provide to consumers. In this case organisational definition was informed by the intrinsic consumer benefit, which was considered to be prevalent throughout the organisation's portfolio.

> *Coomber: "Obviously, with lots of drink brands they tend to show – one, where they've come from, also show how old they are, and they're quite decorative. So the group brand in that sense was the opposite of that – Diageo wanted … or needed to be fairly simple and in a way quite sober in what it looked like. It was very simple, very direct, allowed the name to work rather than lots of complicated form that people might then have difficulty reading. And also, I guess, to show the simplicity … just to talk about … kind of … the clarity, simplicity of vision – but still on the other hand the form itself being friendly but having a structure to them."*

Visualising the brand expression

Here, the creative director clarified the point that the intention of Diageo's visual identity was to be distinct from its visually decorative portfolio of product brands, which he described as expressing 'where they've come from' and 'how old they are'. Therefore, rather than showing origin or authenticity, the Diageo brand mark 'needed to be fairly simple'. The choice of using a logotype as the brand mark, it seemed, was determined by the new, unusual name: a logotype 'allowed the name to work' and become the most prominent feature of the identity. This point reinforces Spaeth's view (Identityworks, 2008) that a brand with a distinctive name is usually more effective when rendered through a distinctive logotype – without any additional pictorial symbols – so that it 'lets the name be the hero'. Furthermore, the creative director alluded to an additional intention of the understated brand mark, when he described the logotype as 'sober'. This revealing choice of word was interpreted as a reflection of expressing Diageo's position on the social pressure

of responsible drinking. It was apparent upon viewing Diageo's website and CSR reports that the organisation engaged in a number of outreach activities that ensures Diageo is seen to encourage responsible consumption of alcohol. Indeed, given the nature of Diageo's portfolio, it is unsurprising that the logotype lacked celebratory flamboyance and, instead, displayed a more understated, restrained expression.

Figure 6·1. Title: Diageo logotype.

Coomber: "The typeface that was … which we created – because it's drawn – was one that in a way maximised the sort of the fullness of those letters. So each one of those letters … has quite a … occupies a full set on a, if you like, on a type. So we chose something that is actually geometric in one sense, but also had a … sort of an open friendly form to it. And then the little curve in the 'a' was … sort of a nod to the pleasure part."

In describing the features of the logotype the creative director made reference to the 'fullness' of the letter widths, the geometric letter-shapes and the 'friendly' forms. This underpinning, precise geometry – based on absolute circles and straight lines – appeared to be another feature that conveyed control and restraint; while the generosity of the letter widths, described as the 'fullness', appeared to be an underplayed reference. This subtlety extended to the expression of the portfolio encapsulation 'pleasure', where the director described the 'little curve in the [letter] 'a' as a 'sort of a nod to the pleasure part'. The discretion in the design was echoed in the creative director's description, where the curvature of the letter 'A' is referred to as 'little' and the 'pleasure part' is transmitted through the subtle gesture of a 'nod'. Indeed the subtlety is most apparent when compared to other smiling brand marks, such Amazon (see Figure 6·2).

Figure 6·2. Title: Amazon brand mark.

This restrained use of graphic language however is not lacking in status. The use of upper-case letters better enables the construction of simpler letterforms, and, equally, reflects the status of a global leader. Furthermore, the rendering of the letterforms in a lighter weight eliminates any connotations of appearing overbearing and further projects the qualities of clarity and precision. The creative director's reference to the 'fullness of those letters' technically relates to the width of the letters in relation to the letter height; such graphic language typically conveys notions of 'generosity'. The letterforms contain features that can be considered open, which, in this instance, is partly the result of a lighter letter stroke; this also conveys a more welcoming and friendly appearance. A further expression of friendliness is the discreet curvature on the crossbar of the letter 'A', which was designed to underscore the portfolio-connecting idea of 'pleasure'.

Smith & Nephew's situation and their brand audiences

With origins dating back to 1856, Smith & Nephew is a 'multi-billion dollar' diversified healthcare organisation (PR Newswire, 2001). However after a number of acquisitions the organisation had lost its focus and, following a four-year programme of major restructuring, Smith & Nephew decided to focus on three distinct, high-growth areas: endoscopy, orthopaedics and wound management (Smith & Nephew, 2012). The result of this strategic reorientation culminated in a new brand identity. In 2001 Smith & Nephew recognised the need for unification of its businesses and appointed Wolff Olins, a brand consultancy, to help them 'define a common goal' (Wolff Olins, 2009).

Sir Christopher O'Donnell, CEO, Smith & Nephew: "Our new brand not only modernizes the company's previous identity but will also allow us to become more visible to our customers within our Orthopaedics, Endoscopy, and Wound Management markets. It unites our business with a single vision for Smith & Nephew" (PR Newswire, 2001).

Bethany Koby: "… the strategic reason for that was because Smith & Nephew was moving from a B2B business or a kind of … essentially communicating just to experts in our field to a consumer facing business."

According to the CEO of Smith & Nephew and the creative director responsible for the design of the brand mark, there were two intentions that drove the new brand identity: first, there was a recognised need to express a new vision for the business. From an internal perspective, the organisation had recently completed a four-year programme of strategic restructuring and wanted to project a 'single vision' that 'unites our business'. Therefore Smith & Nephew's brand identity had an internal function and an internal audience. This vision expression is consistent with similar cases that have used vision expressions; the case for Diageo used a purpose expression as a mechanism for gaining the buy-in of staff. The second intention was to become 'more visible' to their customers and potentially begin to establish a greater presence in end-user, consumer-orientated markets. In this sense Smith & Nephew sought to express a consumer-orientated message that conveyed greater relevance to their existing and potential customers.

Furthermore, in addition to the two stated audiences, it was likely that, since Smith & Nephew was a public company (listed on the LSE and the NYSE), it could be assumed that there would be a second external audience – the financial community. For this community the expression of a strategic vision would suggest organisational focus and a clear sense of strategic direction. Clearly this vision expression addressed the needs of the internal audience and the two external audiences.

Forming the brand expression
This newly defined vision was not expressed in Smith & Nephew's former brand mark, where the key signifier was that of a medicinal cross – an expression of their category of

operations (see Figure 6·3). Clarification was sought from the creative director as to why the categorical signifier was removed from the new brand identity:

> Koby: "Smith & Nephew wanted to create a brand that would celebrate the people and the … kind of … transformations that their products created for people rather than just being a business within the medical industry."

> Jamie: "So was it about trying to … move away from expressing some kind of category of products towards maybe the benefits of the products?"

> Koby: "Yes! And also, to be fair, anyone coming across Smith & Nephew knows what they are. They don't need to put a plus in their logo for people to know that they're part of the medical … you would never come across them unless you were facing a decision or someone had directed you to them or … This is something that your doctor or medical advisor will be working with. So in that sense the kind of didactic–ness of having a cross is just completely unnecessary, to be honest."

> Jamie: "Do you mean there's a redundancy to it?"

> Koby: "Not necessarily a redundancy, just almost like you don't need to be strapped to that vernacular of language in order to have relevance in the medical industry because anyone coming across your brand already knows you're part of the medical industry; that doesn't actually give you anymore credibility, it doesn't actually make your brand any more appeal-ing, it's just a symbol that represents the industry that everyone already knows anyway, if that makes sense?"

It was apparent from this discussion that the organisation intended to have a more con-sumer-facing brand, and, consequently, the consultancy recommended shifting the focus of the expression away from the 'completely unnecessary' generic area of activity. In sub-stantiating the point the creative director referred to the audience's prior knowledge of the brand and raised the issue of the signifier having little relevance in the circumstances where customers came into contact with Smith & Nephew's products. Given that Smith

& Nephew had been established for over 100 years, and awareness of its activities were known within its markets, it could be considered a somewhat futile strategy to continue with such a generic symbol (the cross), which merely signposted the industry of operation. The key point here was that in designing the key expression of the Smith & Nephew brand mark, audience awareness of the brand was a key consideration in the selection of a prominent brand expression. This finding supports the observation from the analysis of archival data, where the categorical identifiers of established organisations were removed if considered either strategically restrictive or superfluous.

In relation to the assumed audience awareness of Smith & Nephew's activities and the context in which its products are experienced, the creative director explained that consideration was given to the expression of a more 'appealing' consumer-orientated message. In particular, the aim of the identity was to 'create a brand that would celebrate the people and the transformations that their products created for people', which alluded to an unspecific benefit-orientated expression. In this respect the generic benefit was the 'transformation' offered by Smith & Nephew's products, as a means of 'giving people their lives back'. This statement appeared to fulfil two purposes: first, it expressed an appealing benefit to consumers – the end-users of Smith & Nephew products; second, it provided a concise statement that bound the collective activities of Smith & Nephew in a way that suggested meaningful impact of their activities.

> *Bethany Koby: "They weren't able to say what they do in one line: If you were to say 'what does your business do', they could say 'well we make medical devices that do x, y and z' which in the end is a boring story for something that's actually very interesting. And what we said is actually what you do is give people back their lives, and then from there tell people the practical things that you do. But that's the bigger picture, that's the bigger story that you do."*

The creative director made a convincing point that the mere itemising of specific activities was neither concise nor compelling, whereas by framing the message towards the impact of the collective organisational activities, she believes, would reveal a 'bigger story'. This reference to a 'bigger story' was interpreted as alluding to the impact (in its broadest

sense) of the activities. The shift of emphasis from the expression of a specific category (via the former brand mark) to the impact of activities into a concise form seemed particularly appropriate for a diversified organisation, where specific activity articulation can be problematic and can be considered 'boring'. Furthermore, it is apparent that such an approach would be less restrictive in scope, and therefore provides sufficient flexibility for the introduction of additional activities that can contribute to the 'bigger picture'.

Previous Mark

Smith✚Nephew

First Choice in Medical Devices

smith&nephew

Figure 6·3. Title: Previous and redesigned Smith & Nephew brand marks.

This movement into higher substantive categorisation was apparent in the findings from the archival data, whereby the abstracting-away from the specific to the generic reflected the extended scope of organisational activity. The articulation 'to give people their lives back' is highly unspecific, in terms of activity; indeed such a statement could potentially account for a range of activities that involve the elimination of numerous personal afflictions – drug addiction, for example. Nevertheless, despite the genericism of the expression, the translation was logical. In describing the process of identifying the brand expression the creative director explained that Smith & Nephew's key audiences were interviewed as a means of understanding the end-user impact of Smith & Nephew's products. From this explanation it was apparent how the audience's perspective was instrumental in how the consultancy subsequently framed the impact expression:

Bethany Koby: "Again through a lot of research and discussion with the people that worked within the business, as well as the customers, it became so evident that literally people's quality of lives were incredibly transformed by the treatment that they had received from … or that the kind of things that Smith & Nephew was able to help with. And I think in a lot of our research and research stories from, you know, people that had diabetes and, you know, their wounds were so uncontrollable and so embarrassing to them that they were literally not able to be in public. And the fact that, you know, through the things that they had as well as through these products that Smith & Nephew provided their doctors with, their life was basically given back to them. And I think we heard so many of these stories that it was almost a natural way of articulating what we had seen and heard."

Koby: "We didn't really invent … we invented in a sense of … kind of … created something visual and communicated something that articulated it very clearly. But we didn't invent the stories that were told, we just unpacked them and helped them [Smith & Nephew] tell them tell their story better, if you will."

As the creative director suggested, Smith & Nephew's brand expression was heavily informed by the personal experiences of the end-users of the medical products. As such, the creative director's interpretation of the genericised end-user benefit: 'their life was basically given back to them', was a direct translation into Smith & Nephew's brand expression: 'to give people their lives back'. The credibility and authenticity of this expression was emphasised in the comment: 'we didn't invent the stories that were told, we just unpacked them', which reflects the need for credible expressions to be 'accurate'. Such recognition of accuracy in brand expression highlights a distinct contrast from that of BP's [criticised] Beyond Petroleum programme. Smith & Nephew's activity collectively contributed to their brand expression, whereas only seven per cent of BP's activities could be considered as being beyond petroleum (Pearce, 2008).

In addition to being credible, Smith & Nephew's new brand expression was relevant and appealing to its key audiences. For Smith & Nephew's staff the expression concisely encompassed their activities into a purpose-led expression that projected a unifying and galvanising purpose, while simultaneously conveying appealing indicators of strategic di-

rection and synergy to the financial community. For the end-users of Smith & Nephew's products the expression conveyed a generic benefit and thus an attractive proposition at the individual level. As such, this expression had a seemingly relevant appeal to all three of Smith & Nephew's key audiences.

Visualising the brand expression

According to the creative director part of the consultancy intervention consisted of a visual articulation of Smith & Nephew's purpose statement. In this respect the new symbol was an abstract depiction of a starburst or a leaping figure. The symbol's ambiguity was raised during the discussion with the creative director in the hope of gaining an explanation of how the symbol conveyed the vision of 'giving people their lives back'.

> *Koby: "I mean it came from … a kind of investigation around a shape or around a series of shapes that weren't closed … it came form this idea of a starburst or some kind of thing with energy."*

> *Jamie: "Is it supposed to be a person with arms and legs running or leaping?"*

> *Koby: "That came … kind of … I guess that was part of it … a bit later. I think it's one of those things where you can see lots of things in different marks, especially abstract shapes. And I think that was something that came a bit later. Yes – it kind of looks like that; but that – at least from my recollection of the process – that wasn't the kind of intention from the beginning. The intention was to create something that had energy, that was dynamic, that could be used really kind of flexibly, again, in imagery as opposed to creating some kind of figure that was running. But it does so happen that it also has that quality to it, which was a great thing."*

Whilst the creative director referred to the intention of the starburst as being to symbolise the notion of 'energy' through a series of 'open shapes', she considered the resemblance of the figure to be an unintentional but nonetheless 'great thing'. It seemed somewhat surprising that, for a brand so frequently described as having a people-orientated focus, the figure resemblance was unintentional. Throughout this discussion, the creative director

stated that there was a 'conscious effort that Smith & Nephew wanted to create a brand that would celebrate the people and the transformations that their products created for people'. Furthermore when the creative director was asked about the choice of typeface, the director responded: 'we created a custom typeface; again, [it was] this idea of making them more human'. Given these explicit intentions it would seem that had the starburst had less of a resemblance of a figure – such as a non-corresponding number of segments with the number of limbs and a head – the symbol would have been less effective in delivering on its key intention of making Smith & Nephew look 'more human'.

> *Koby: "Again, this idea of making them more human and looking at the kind of competitors in their world … everyone was using sans serif, very stern, very clinical-looking kind of typography and clinical imagery; and we just listening to the stories and listening to this amazing impact they had on people's lives we really wanted to celebrate a more human quality, and the rounded typeface – that still is very legible and still is very clear – but is just much more friendly and much more distinct in that world of medical services. And also, again, the rounded typeface works very well with the round shapes of the burst."*

In explaining the emphasis on the human signifiers the creative director once gain referred to the end users of the organisational products, but, additionally, made reference to the lack of visual distinction amongst Smith & Nephew's competitors. From this explanation it became apparent that the expression of humanistic qualities provided a point of difference in the medical industry, where 'everyone was using sans serif, very stern, very clinical-looking kind of typography'. By contrast Smith & Nephew's brand further reinforced its friendly, energetic values through the use of a rounded logotype and typeface, rendered in bright orange. This choice of colour, when aligned with the intended expression, also provided visual distinction within the context of a medical landscape, which the creative director referred to it as awash with 'a lot of green, a lot of blue; again because I think it's safe and clinical'. The suggestion here was that the brand expression, in addition to conveying the organisational vision, was considered in relation to its distinction within the competitive environment and thus its appeal to the primary audiences.

Unilever's situation and their brand audiences

Unilever was officially formed from the merger of Lever Bros. and Margarine Union Limited in 1930. Both former organisations had origins tracing back to the 1870s and 1880s respectively. Unilever expanded from its core activities in soap and margarine to become a giant within the consumer goods industry, building a presence in 150 countries. By 2003 its worldwide turnover had reached £40bn and 'achieved 11% growth in earnings per share' (Unilever, 2003). With a portfolio of over 1400 brands Unilever considered itself too dispersed and in need of greater focus and a unifying strategy to guide future growth (Wolff Olins, 2009b).

> Lee Coomber: "Unilever were removing … they'd had a couple of problems with Persil … I think at that point they'd had an issue with the formula and it had rotted some people's clothes and stuff, and then very quickly from that it gets into the press: 'Actually Persil is owned by Unilever – who the fuck are Unilever? … This invisible giant that also owns Marmite; all of your favourite brands'. Coupled with the fact that … at the time Unilever was struggling to get their business strategy implemented within the company. They had some significant challenges: one, to cut down the size of their portfolio of brands, which was about 1400 down to around 400, at least. They were a foods and non-foods business, and that didn't make sense to the City; they couldn't see what the synergy between those two things was. So people didn't understand their story."

Unilever's brands, such as Dove soap, Surf washing powder, and Flora sunflower spread, were everyday household names, while the parent brand was essentially 'invisible' to consumers. Whilst the consumers' relationship was with these product brands, the creative director's suggestion here was that the consumers wanted to see accountability by the owner of Persil. The creative director's comment that the external perception of Unilever as an 'invisible giant' alluded to the observation that Unilever's product brands contained no endorsement, and such features had negative connotations – particularly in the context of an era of open information. Therefore under these circumstances it was apparent that Unilever was facing greater pressure to be accountable and to be perceived as ethically and environmentally responsible.

In addition to the consumer audience there was 'the City', by which the creative director referred to Unilever's financial audience. The creative director's comment that the City 'couldn't see what the synergy … was' between the organisation's 'foods and non-foods business' suggested that the financial community needed a clearer, more focused expression of strategic direction. Furthermore the creative director's comment that 'people didn't understand their story' suggested that Unilever's strategy was unclear. This issue, along with the recognition of the need to significantly rationalise the portfolio, revealed a necessity for greater strategic focus. As such, it became clear that there were three key audiences: staff, consumers and the financial community.

> Coomber: "So the idea of … that we had was that Unilever should develop its own brand to a point where it could put it onto a product and it would add value to that product. Not in the 'what' it was doing but 'how' that product was produced because they've got quite good ethical values. So part of the creation of the logo was two things: one it was to begin to communicate vitality; and unlike Diageo, because it was going to be consumer-facing, to be a consumer-facing corporate brand as opposed to being a financial holding."

Forming the brand expression

The creative director's recommendation was for Unilever to migrate from the previous branded architecture to an endorsed brand architecture, which would enable Unilever to be more visible in the eyes of consumers. Under this structure the brand would have the ability to 'add value' to its products, based on its assumed ability as a signifier of 'how' a particular product had been produced. According to the creative director, Unilever has 'quite good ethical values' and therefore such an expression would 'add value' to Unilever's products. The assumption here, however, was that such an expression would 'add value' to the products and therefore be more appealing to their consumers.

Nevertheless this assumption had a logical platform; ethical organisations tended to be highly regarded. It was also apparent from the discussion why there was a need for greater transparency in how Unilever conducted their business and clarity about what it is that they do. In this sense transparency referred to the notion of occupying a prominent position on the product packaging, in order to suggest responsibility and a sense of greater

honesty. Such ethical reassurances were becoming increasingly appealing to consumers, as reflected through the growth in organic and fairtrade produce. According to the creative director, the expression of ethical values through the construction of a brand personality served two purposes: first, at the product level, the visual endorsement of Unilever's product brands gained from the added-value of being associated with a perceived ethical organisation, and second, at the organisational level, the visual expression of 'how' they produce products provided a means of differentiation.

It was unclear, however, why the creative director considered it necessary for the brand 'to begin to communicate vitality'. This singular word was shorthand for the formative idea: 'adding vitality to life'. The creative director explained the origins of the idea:

> Coomber: "It came from Hesketh Lever, who said in about 1890 or 1880 or something like that. He talked about his purpose was to … something like … improve hygiene … cleanliness, hygiene … Basically he did soap – made soap – but he didn't see that as what he did, he saw himself as a bringer of health – as you would do at the end of the 18th century … because obviously children … lots of people died of diarrhoea and all sorts of stuff."

> Jamie: "So is it closer to expressing purpose then?"

> Coomber: "It is, very close. Because all of its products then as part of that process looked to … that's the process when they began to remove salt from … products, made sure that they were actually delivering vitality. So Hesketh, William Hesketh Lever in 1890 said: 'To make cleanliness commonplace, to lessen work for women, to foster health that'll contribute to personal attractiveness that life may be more enjoyable and rewarding for the people who use our products.'"

> "It's a modern take on that."

According to the creative director one of the purposes of the logo was to 'begin to communicate vitality', which acknowledged that this construct was not expressed prior to the design intervention. It also became apparent that, despite the origins, the organisational

purpose appeared to have been a neglected part of the former strategy: It was only because of the branding process that Unilever 'began to remove salt from their products'. In other words, whilst the organisational purpose was authentic, it had lost its relevance: sanitation was a big issue in the late 1800s but less so in the latter part of the 1900s. Hence the creative director made it apparent in his comment 'it's a modern take on that', that the purpose statement needed a more relevant interpretation. In this sense the Unilever case shared similarities with the Smith & Nephew case, whereby the process seemed to be concerned with discovering an authentic purpose as a platform for building an appealing brand expression for its key audiences.

This discussion revealed that the creative director made reference to the original organisational 'purpose', where the definition moved from the specific to the generic: from a specific product (soap) to the benefit of the product (hygiene) to the wider personal, social and environmental impact of the product within a given context (health). In following this explanation it became clear that there was a logical relationship that linked the organisational purpose with the organisational activities. Over time Unilever's activities had extended far beyond the manufacturing of soap; thus Hesketh's original purpose needed 'a modern' adaptation to ensure its relevance to the organisation's expanded portfolio.

The essence of Hesketh's purpose was interpreted concisely under the banner of 'adding vitality to life', which was subsequently used as a mechanism for aligning Unilever's portfolio of brands. This appeared to provide a common-denominator linkage throughout the organisation's prominent brands, and therefore could be seen as a portfolio summary; indeed this was alluded to throughout the discussion. However, the idea of 'vitality' was less concerned with capturing the added value of the entire variety of differing products and more concerned with encompassing the impact of the organisation's activities and the products that it chooses to market.

In addition to providing a means of aligning the portfolio of product brands, the 'vitality' purpose enabled the organisation to address the issue that was stated at the opening of the discussion, whereby 'they were a foods and non-foods business' and the City 'couldn't see what the synergy between those two things was'. By reinterpreting their original purpose,

and using this as a strategy to inform organisational activities, expressions and behaviour, the organisation was better equipped to address the issue that 'people didn't understand their story'.
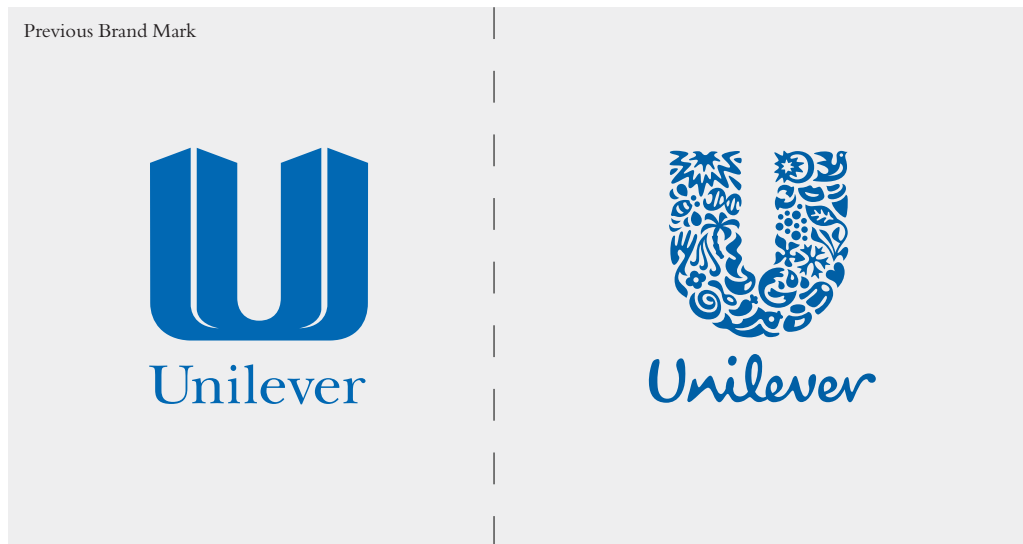
Figure 6·4. Title: Previous and redesigned Unilever brand marks.

Visualising the brand expression

In addition to expressing the purpose there was recognition for Unilever to become a more transparent organisation, which was partly reflected in the depiction of the range of Unilever's activities through its use of the miniature icons, as explained by the design consultant responsible for the design of the monogrammatic symbol.

Jamie: "Could you tell me what the thinking was behind the design of Unilever's logo?"

Miles Newlyn: "Well that was basically … err … let's express … err … let's kind of describe what they do in the mark. It's very simple. So they do all these different things and use different ingredients and fit into … different parts of … life in different ways, you know from cleaning products to food to … well they're the main two anyway … but you know, different kinds of food anyway. And so … the idea was … you know … that's a kind of broad aspects of life so let's try and show as much of it as possible."

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Jamie: "I find it interesting that they're trying to express activities."

Newlyn: "Yeah, rather than a set of values. I mean … the thinking behind the thing was vitality … and that logo was a simplification of an idea which … which was a diagram or an illustration of … let me just … I've got it somewhere … I saw it the other day knocking around in my desk … just hold on … it was the kind of tapestry of life."

Newlyn: "I mean, the value really … or the thing we wanted to express was vitality … err … and I think that, you know, the sun on the top left-hand corner and the bees flying around and the kind of sparkle of the interplay of shapes express that."

In this description of the brand mark the designer emphasised the intention to 'describe what they do', in terms of visually conveying Unilever's activities. The suggestion here was that the organisational pressure to become more transparent had influenced the visual design of the mark: 'they do all these different things' therefore 'let's try and show as much of it as possible'. The designer's effort to reveal as much activity as was feasible helped to address two issues: first, the need for transparency, and, second, convey the notion of vitality through the liveliness and relative abundance of the animated icons.

In describing how these icons reflect the concept of 'vitality' the designer referred to the natural elements in the monogram that signified life: 'the sun on the top-hand corner' and the 'bees flying around' which suggest natural liveliness. These symbols of natural organisms are rendered in a simple and flowing manner that synchronises to form the letter 'U'. This close relationship of the shapes – from fish to plants to water – each with a specific place and purpose, suggests balance and an equal consideration of all of the organisms. As such, this display seemed to convey an explicit ethical and environmental stance, which the designer alluded to through his description of the relationship of shapes as an 'interplay' and a 'kind of sparkle'. Such gentle and innocent use of terms appeared to capture the mood of the monogram and the hand-rendered, cursive logotype, which the brand mark designer described as having 'a sort of naïve quality'. In this sense the expression of the range of organisational activity suggested liveliness and, therefore, could be considered as conveying the notion of vitality.

GlaxoSmithKline's situation and their brand audience

In 2000 Glaxo Wellcome and SmithKline Beecham merged to become GlaxoSmithKline (GlaxoSmithKline, 2000). Both former organisations were considered as leading pharmaceutical businesses, albeit occupying different positions within the market. Glaxo Wellcome was a scientific-led pharmaceutical renowned for their research and development of what could be considered to be 'serious' medicines (Grainger, 2012). Glaxo Wellcome sold its products to doctors and hospitals through individual product names and, therefore, made little effort to engage in organisational-level branding in a consumer-led manner (Grainger, 2012). By contrast, SmithKline Beecham engaged with consumers through brands such as Sensodyne toothpaste, Panadol paracetamol and Ribena blackcurrant juice. Whilst they also manufactured and marketed what could be termed 'serious' drugs, they were primarily known for their over-the-counter medicines, such as Beechams cold and flu remedies (Grainger, 2012). The two organisations, therefore, represented the opposite ends of the pharmaceutical spectrum, each appealing to a different audience.

Whilst the two former organisations were very different, the new organisational nomenclature sought to preserve the existing brand equity by using an amalgamation of the two former organisational names. This aspect of the identity had already been decided prior to the consultancy intervention.

> *Paul Barlow: "I met with Jean-Pierre Garnier, and I remember going and sitting in his office and sort of looking around his office; you always look around a CEO's office, thinking I want some hints about what this guy's into. And, I remember him just saying 'look the most important thing is I don't want this company to be known as Glaxo. I want it to be known as GSK'. And that was about the only steer I ever got."*

GlaxoSmithKline's CEO (previously the CEO of SmithKline Beecham) foresaw the likelihood of the long company name becoming reduced to its first syllable, Glaxo, which would suggest an acquisition rather than a merger. The CEO's concern of the nomenclature's ability to convey organisational status was considered to be 'the most important thing' in establishing the brand identity. It was apparent that the identity had to encour-

age audiences to refer to the organisation by its initials, thereby eliminating any potential prominence to either of the previous organisational names. Furthermore, the neutrality of the initials, GSK, would seem to be a better strategy for encouraging staff to view the organisation as one entity rather than two joined entities. From a pragmatic perspective, the use of an abbreviation would offer ease of pronunciation, particularly in a global context; additionally, this typographical economy would facilitate practical endorsement functions, such as branding small-sized pills.

> *Barlow: "The other thing that was becoming clear was that it [the organisation] was moving into, or had the potential to move into, more of a consumer space. And I'm not talking about the part of the business that does Lucozade and that sort of thing, but it was … the idea that the big pharmas would be selling direct to consumers more.*

The CEO, it seemed, recognised the opportunity for GSK to become the 'first … within the pharmaceutical industry' to occupy a 'consumer space', with the intention of building a direct relationship with consumers. This comment seemed to reflect an awareness of the importance of organisations being visible to consumers, and not just 'part of the business that does Lucozade'. The suggestion here was that rather than allow the two opposing ends of the pharmaceutical industry to simply continue as they had pre-merger, the apparent emphasis was on unification. As such, the new brand had to be relevant to the internal audience and provide a sense of vision, while expressing an appealing message to an external audience of consumers.

> *David Grainger: "The idea of the identity was to have a much softer, more consumer-led identity for the first time within the pharmaceutical industry. So the previous biggest merger was AstraZeneca, and they ended up with … I think it was something around the helix or infinity symbol, which was in no way consumer-facing."*

The strategy of adopting this position suggests that the focus, ultimately, was on the end-users of GlaxoSmithKline's products – civilians. In this way the organisation can be seen as apparently taking an active role in shaping consumers' perceptions of the organisation. This indicated that, by establishing a relationship with consumers, the organisation was

aiming to achieve greater public visibility – as became evident in the Unilever case. The focus on consumers was most pronounced in the strategy of adopting an endorsed brand architecture, which is consistent with the comparable Unilever case.
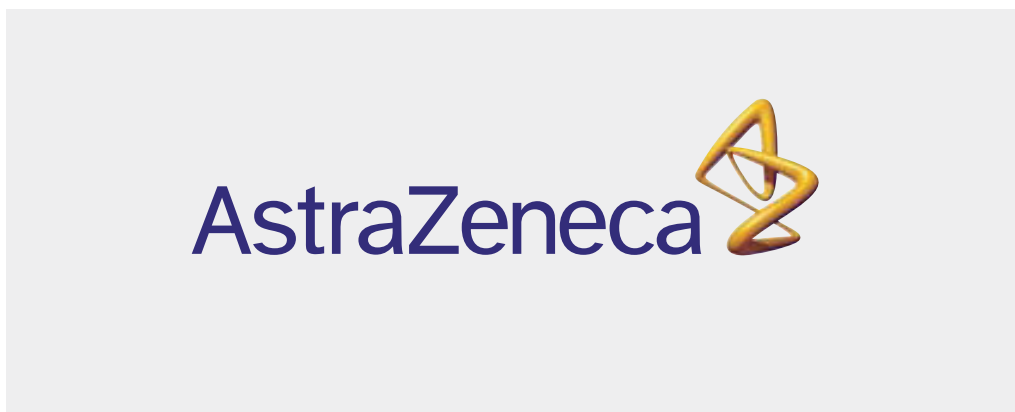
Figure 6·5. Title: AstraZeneca brand mark.

It was considered that, within the pharmaceutical industry – prior to GSK's new brand identity, there were no obvious consumer-facing pharmaceutical brands. This was seen as an opportunity for GSK to occupy such a space. The strategy consultant cited a comparative case from a slightly earlier point in time (circa 1999) of the merger of Astra AB and Zeneca Group to form AstraZeneca plc. Here the consultant made a reference to the visual identity using a symbol that was a monogrammatic combination of the initials A and Z by using the graphic language derived from a double helix (to signify both the scientific activity and the merging of the two organisations). AstraZeneca's visual depiction of scientific activity sought to reinforce the 'science' domain, which had already been established through the reputations of the merging organisations – and was retained through the use of compounding the former equity-laden nomenclature. As such, it was clear why this mark was not considered as consumer-facing.

Forming the brand expression

> *David Grainger: "… Jean-Pierre Garnier … became the CEO of GlaxoSmithKline. His vision for the business was to be much more consumer-focused, and as a result of that part of*

the strategic development that was done in the positioning of the business was around three ideas … and I'll try and get these right: which is something like do more, feel better, live longer … although I can't remember which order."

It became apparent that as the organisation had decided to become consumer-facing the 'positioning of the business' would be orientated around consumer benefits. The organisational mission was stated as "improving the quality of human life by enabling people to do more, feel better, live longer" (GlaxoSmithKline, 2000). This mission appeared to be composed of two parts: a purpose statement, followed by three vague statements that attempted to capture the range of benefits for the end user. It can be seen how the first part, the organisational purpose, would be relevant to the internal audience; meanwhile the second part – which informed the visual expression – alluded to an expression of benefits, which could be seen as being relevant to an external audience, in this case consumers. When considering the audience of the brand message, the mission statement had a sense of articulating a 'Barnum effect', whereby the statement could be seen as offering something appealing to everyone (Dickson and Kelly, 1985).

Figure 6·6. Title: GlaxoSmithKline brand mark.

The generic nature of the mission statement and its focus on vague assertions, such as 'improving life', could accurately portray many organisations, not just within the pharmaceutical sector. Indeed, Unilever's purpose is stated as 'adding vitality to life'; Smith & Nephew's purpose is stated as to 'give people their lives back'. GlaxoSmithKline's mission

statement, in addition to expressing organisational purpose, articulated the impact of the activities in a vague but appealing way. The intrinsic appeal of being able to 'do more, feel better, live longer', whilst clearly attractive, could relate to a range of activities and many different types of organisation. This ambiguity appeared to be reflected in the visual expression of the brand.

Visualising the brand expression

After speaking to the strategy consultant and the creative director it became apparent that the rebranding for GlaxoSmithKline had involved only limited consultancy intervention. The organisational nomenclature had already been decided by the organisation's management team, as had the mission statement and the strategy of becoming a consumer-facing brand. Indeed, it seemed that, as the CEO stressed that he wanted the organisation to become known through its initials, that a monogram would be the most obvious visible solution. The pragmatic considerations, therefore, appeared to dictate the visual direction, as the creative director recalled:

> *Paul Barlow: "… the idea that we needed a shape [was] because it needed to be used on tiny bits of pharmaceutical packaging as well as on humongous bits of signage, so there was a scale thing. And then just following Jean-Pierre Garnier's lead in saying that it's got to be a shape with the initials in because if you want it to get known as GSK then you've got to have … use the letters as the symbol, if you like. So that's how GSK came about in the shape."*

The shape's purpose was twofold: to act as a visual container for the initials and to be suggestive of the concept of 'feel better'. It seemed that the creative director chose to focus the expression on the most specific aspect of the mission statement that related to capturing the abstract benefit of the pharmaceutical activities. The concept of 'feel better' appropriately conveys the most immediate benefit of medicine, rather than 'do more' or 'live longer', which both lack the immediacy and the specificity. In addition, the immediacy of the message would seem to be better suited to its intended audience of consumers. However, whilst the phrase 'feel better' appears to be the most specific phrase from the mission statement, the visual expression of this concept was entirely, and purposefully, ambiguous.

David Grainger: "J.P. Garnier's vision for the business was that he wanted GSK to be completely consumer-led, hence the colour palette, hence the very soft shape, which some people think looks like a heart but it isn't; some people think it looks like a kidney but it isn't. It's just a shape; but it's a soft shape. And of course the glow of the logo as well was done very deliberately as part of that warmth and warm feeling that you get as a result of the drugs that this company makes."

The strategy director referred to the abstract, organic shape as a 'very soft shape', one that is not intended to be any specific organ. The strategist acknowledged this ambiguity in his statement that 'some people think [it] looks like a kidney'. It seemed that such ambiguity of third party interpretations was considered acceptable because the shape was interpreted as resembling human organs but, crucially, no specific organ in particular. This, therefore, would seem suitable for a diversified pharmaceutical organisation: GlaxoSmith-Kline's medicines are not specific to any particular body part. Indeed, in justifying this non-specific, abstract approach to visualising the concept of 'feeling better' the creative director raised the limitations of the mark being too literally depicted as 'you end up looking like a fertility clinic or whatever'.

Barlow: "We said that the shape could have been a heart, it could have been a kidney, a liver, a womb or … but it was nonspecific because we couldn't be body-part specific because whatever you do you end up looking like a fertility clinic or whatever. … It was all about getting the letters across, doing it in a way that was warm and friendly, if you like, and had that sense of optimism, hence the glowing orange, and was a unique shape that could be recognized at very, very small sizes. So it was quite a practical, pragmatic approach really.

As a diversified pharmaceutical organisation the visual expression of the brand could not be specific to any one area of operation without disregarding adjacent areas of activity. Indeed when considering GlaxoSmithKline's target audience and the intended brand architecture model, it would appear unnecessary for GlaxoSmithKline's brand mark to be too specific when it would primarily be operating as a brand endorser to its own product brands. In this respect the relationship with the consumer would be a secondary relation-

ship. As such, the brand mark's functional purpose had clear cost implications that therefore became an important consideration and was prioritised accordingly.

> "… you ended up with the shape as being the predominantly obvious identifier of GSK and then just the name itself; but it could be blue, it could be green, it didn't have to be always in the orange.
>
> Jamie: "Why was flexibility important?"
>
> David: "It was a huge cost saving idea! To actually be able to have a very, very dominant or a very, very … sort of consumer facing corporate brand with the orange but then to allow it to also become secondary to the product brand."

In relation to the practical purpose of the mark the creative director stated: 'it was all about getting the letters across', while simultaneously conveying an appealing set of consumer-facing values. Again, the reference to the ability of the design to be reproducible at 'very, very small sizes' revealed another functional consideration in the design of the brand mark: the three initials within the shape had to be legible at small sizes. Given the range and the volume of GlaxoSmithKline's product packaging it can be seen how such colour and scale reproduction considerations had to be assessed in order to achieve such 'huge cost savings'.

6·3   Activity brand mark expressions

The two following cases featured expressions of organisational activity in their brand marks. The interpretation of interview data relating to both cases is discussed around the four dimensions that underpinned each case: i) situation, ii) audience, iii) appeal, and iv) expressions.

Cearns & Brown's situation and their brand audiences

Cearns & Brown was a northern food supplier based in Cheshire that had – at the time

of the branding activity in 1997 – been operating for 123 years (Design Week, 1997). Its core activity was supplying catering products to commercial organisations, hospitals and schools (Lloyd–Morgan, 1999). Despite the environment around catering services becoming increasingly competitive, Cearns & Brown had a turnover in excess of £160m and was experiencing continued growth (Design Week, 1997). However, given that the organisation had been established for over 100 years, there was a point of interest in understanding why the creative director felt it was necessary to illustrate the organisational activity through the brand's visual expression.

> *Jamie*: *"What was the thinking behind the Cearns & Brown identity?"*

> *Lee Coomber*: *"They supply food to commercial kitchens and they had a brand under which they did that, which was – I think – was Countrywide or something like that. So that's what actually got into people's kitchens. And then your relationship was with Cearns & Brown, where you'd put your orders in and they would deliver it. The feeling was that … therefore … you're missing a big opportunity to … unless you're ringing them up and they're delivering, actually the brand is pretty much invisible … of Cearns & Brown."*

From the creative director's description of the Cearns & Brown's situation it became clear that the problem was related to the issues of brand architecture and brand awareness. The use of two unrelated brands, one for the organisational name and one for the product range, confused Cearns & Brown's audience. Consequently the perception was that to some of its customers the organisation was perceived as a supplier of foods, while to another set of customers it was perceived as merely a delivery service. Both types of customers had prior relationships with the two brands but were unaware of the scope of Cearns & Brown's activities, to the point of the brand being described by the creative director as 'pretty much invisible'. As such, this problem was essentially the result of an ineffective use of brand architecture that had led to a lack of awareness amongst its audiences of the totality of the organisational offering.

The creative director's recommendation, therefore, was for Cearns & Brown to adopt a monolithic brand architecture to unite the two organisational activities into a singular,

more specific brand message. The reference to a 'big opportunity' for Cearns & Brown referred to the use of a single brand name for all of their services, as a means of enabling the organisation to build greater brand awareness amongst their customers. It subsequently became apparent that the creative director considered Cearns & Brown's product packaging to be a key medium for increasing the visual presence of the brand within the domain of the professional end-user. In this sense the creative director identified the packaging as one the more tangible interfaces of the brand, which presented the opportunity to establish a more prominent visual presence.

Figure 6·7. Title: Cearns & Brown's brand mark.

Forming the brand expression

It became apparent that the lack of audience awareness of Cearns & Brown's activities influenced the focus of the brand's primary message. The idea behind the brand expression was based on explicitly illustrating the specific services provided by Cearns & Brown. More specifically, the depiction of activities combined the two aspects of the business: the physical delivery of food produce, and the 'assurance of product quality' (Lloyd-Morgan, 1999: 38). This strategy, therefore, would help to directly address the problem of lack of audience awareness of the organisation's actual activities.

> *Creative Director: "On the identity, on the – sort of, if you like – the logistics part, it then made sense to kind of … it's a different thing that they're doing there; they're not making food, they're delivering food … is then to connect the two things with the … the sort of … running, flying, delivery service kind of idea – message."*

It was apparent from the creative director's explanation of the project that the brand identity sought to be visually literal in its depiction of the Cearns & Brown's services. Such an approach was unambiguous and, thus, less likely to be misinterpreted, which in this instance was a key driver behind the rebranding programme. With the theme of the identity focussed on explicitly depicting Cearns & Brown's activity, the creative director explained that it 'made sense' to connect the two ideas of food and delivery into one concept: 'delivering food'.

Visualising the brand expression

The brand idea of 'delivering food' was expressed through two mechanisms: images of foodstuff – tomatoes, bananas, and such like, and the superimposed rendering of references to motion through the use of legs and wings. In particular, there was an emphasis on contrasting the two types of register: the direct tone-of-voice depicted in the natural photography, specifically used as a signifier of freshness and the high quality of the products, and the swiftly rendered anatomical sketches to further reinforce the sense of urgency in the distribution of produce. This 'very simple' use of graphic language facilitated the clear expression of Cearns & Brown's activities.

> *Coomber: "We recommended that they changed their packaging to be Cearns & Brown packaging, and on that there's a very simple packaging design … again, simply because it's a commercial kitchen and it could be very simple, very reduced and quite elegant."*

The simplicity referred to by the creative director partially related to the fact that commercial packaging contained less mandatory information than retail packaging, and therefore could be made 'very simple, very reduced and quite elegant' in its visual tone-of-voice. The creative director's reference to the simplicity of the design also related to the clarity, efficiency and sophistication of the graphic language. It was unclear, however, how this visual direction aligned to the positioning of the product: whilst there was an intention to express product quality, such visual 'elegance' was typically associated with high value premium brands. An illustration of this point can be seen in figure 6·8, where the sophisticated use of graphic language on the packaging of a Waitrose pizza reflects an

intelligent approach to conveying messages; this is not too dissimilar to the type of packaging provided by Cearns & Brown.

Figure 6·8. Title: Waitrose pizza packaging.

This combination of simplicity, elegant design and the use of economical wit is typically used as a signifier of intellect and taste, hence the association with premium-positioned brands such as the comparison to Waitrose's packaging (displaying the product through an idea). Positioning aside, the inventive use of wit and economical graphic design, present throughout the visual manifestations, transformed the expression of organisational activity into a more memorable message – particularly when displayed on the sides of large vehicles, for example. From this point of view the visual language helped to address the two

branding intentions: to increase the awareness of the Cearns & Brown brand and ensure greater clarity of Cearns & Brown's actual activities.

This need for visual distinction and memorability was also apparent in the creative director's response to the question regarding the differentiated typeface used for the ampersand within Cearns & Brown's logotype:

> Coomber: "I mean sometimes you need to … err … you need to put quirks in … to kind of … give the thing kind of character and individuality. I mean the same as in Diageo, just curving that 'a' is not something you would normally do – the crossbar of the 'a'."

The culmination of witty images and the typographic quirk served the purpose of providing visual distinction and to 'give the thing kind of character', which, as the creative director alluded to, suggested a specific brand attitude. This distinctive style of graphic language can be seen as portraying the organisation as being creative, enthusiastic, informal, and witty, thereby establishing an additional point of difference within its industry. Furthermore, this visually distinctive approach to brand identity design could be seen as an attempt at maximising brand awareness in order to attract a prospective organisational buyer. Indeed, two years following the rebrand Cearns & Brown was acquired by Brakes Brothers (Brakesgroup.com). The consultancy responsible for the design intervention was also responsible for the rebranding of Abbey (formerly Abbey National plc), which was rebranded in a visually distinctive manner in 2003 and subsequently acquired 17 months later by Santander (Identityworks.com).

Altria's situation and their brand audiences

With origins tracing back to 1847 Philip Morris Companies grew to become one of the largest cigarette and tobacco companies in the world (Altria, 2013). The Philip Morris name was used at both a product level (for a specific brand of cigarettes) and the organisational level, and therefore was synonymous with tobacco. However, over time, society's attitude towards tobacco had significantly changed: in the organisation's formative years cigarettes were associated with glamour, fuelled by the portrayal of smoking within the mass media, whereas in more recent times the use of tobacco had become socially unac-

ceptable, as the health risks associated with the long-term use of tobacco became evident. As lawsuits against tobacco companies increased, so, too, did the negative publicity (BBC, 2001).

> Arters: *"They're the holding company; it's not a consumer-facing company, Altria. Their aim is shareholder value, as most holding companies are. So I think that they came from a history of a product – tobacco – it is a product err … with err … you know … I'm trying to figure the exact words … that has had major issues; it's a product that is made for adults … I'm having difficulty putting it into exact words."*

> Arters: *"So … err … frankly it is a company that has been vilified over the years and, at the time, they had a commitment to openness and transparency and … doing better than what they had in the past."*

The creative director chose his words carefully when describing the organisation's products as having 'had major issues' and, as a result, the organisation had been 'vilified over the years'. Such vilification is likely to have reduced the appeal of the organisation's stock in the eyes of investors; indeed it appeared that Philip Morris Companies was over-exposed, in terms of its close nomenclature association with a negative product brand. In relation to this point the BBC (2001) reported that: 'the tobacco industry has continually sought to reassure investors by saying that the litigation environment is getting better'. In this respect Altria's brand activity was aimed at a financial audience, as implied in the creative director's comment that Altria is 'not a consumer-facing company … their aim is shareholder value'. The issue, therefore, facing Philip Morris Companies seemed to relate to two things: first was the brand architecture, second was the aim to increase the organisation's appeal to its external audience – the financial community.

Forming the brand expression

The creative director highlighted what seemed to be the key issue facing the organisation: the Philip Morris Companies' nomenclature 'obviously skewed towards tobacco'. With this nomenclature the organisation was unable to exploit the advantages of a holding company structure, i.e., to reduce the risk exposure – in terms of protecting the organisa-

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tion's reputation from potentially negative publicity relating to tobacco litigation. Furthermore, the acquisition of an 84 per cent stake in Kraft Foods and a 51 per cent stake in Miller Brewing Co (Brand Republic News, 2003) seemed to provide a legitimate reason for Philip Morris to distance the parent company from its tobacco associations.

> *Lee Arters: "And so at the time, and I think it was 2001, Philip Morris Companies actually owned Philip Morris International, Philip Morris USA and Kraft Foods, as well as, I believe, a 51 per cent share in Miller Brewing. So the name Philip Morris Companies did not accurately define who they were as a company. It obviously skewed towards tobacco, to the name itself; they owned brands in Kraft Foods: Oreo cookies, Kraft cheese, and a wide array of products; so it didn't accurately reflect what the company owned – the holding company."*

The existing nomenclature, admitted the creative director, 'didn't accurately reflect what the company owned'. Whilst his earlier assessment of the nomenclature was accurate in relation to the name being 'skewed towards tobacco', it was reasonable to assume that the financial community – Altria's key audience – would already be aware of the organisation's broader portfolio. When considered from this perspective, it seemed apparent that the problem of 'inaccuracy' reflected an intention to insulate Altria's reputation, as a means of increasing its appeal to the financial community. As such, the primary emphasis of the brand identity, it seemed, was to appear completely unrelated to tobacco, and, instead, focus its brand expression on the generic concept of 'diversity'.

> *Arters: "And so it really is about diversity and the diversity of the holdings of the company. We wanted something that was bright and energetic, something dynamic … that certainly stepped far away from the … You know Philip Morris Companies had a crest, it was a crest that's used on cigarette brands."*

> *Arters: "I think that it [the logo] reflects their diversity, it reflects their energy and passion. It is difficult to get everything into a logo that's for sure. I think that the logo was really meant to say that they're not about one thing but about many."*

Perhaps the most revealing comment from the creative director was that 'we wanted something that was bright and energetic, something dynamic … that certainly stepped far away from the …'. This comment revealed the intention of Philip Morris Companies to distance itself from its tobacco related crest, and subsequently shift the visual empha‐ sis to the variety of its portfolio of products. This strategy became most apparent in the following comment: 'I think that the logo was really meant to say that they're not about one thing, but about many'. Such a brand proposition, given the context described earlier, could be seen as holding greater appeal in the eyes of the financial community and the organisation's corporate investors.

Figure 6·9. Title: Altria logo and brand identity booklet spread. Source: Landor Associates.

Visualising the brand expression

The new nomenclature was derived from the Latin term Altus, meaning 'high'. This was claimed to be a reflection of the organisation's drive for peak performance and their aspi‐ ration of 'reaching higher'. Again, it was clear how this message would appeal to investors

and the financial community. However, there was some uncertainty, from a creative perspective, whether such an expression was a means of encapsulating the company's portfolio – the majority of its holdings were in the tobacco and alcohol industries.

> *Jamie: "I wondered if this concept of 'reaching higher' was a clever way of referring to a kind of category, you know, in terms of linking tobacco and alcohol, is it a really clever, creative way of signifying intoxication?*

> *Arters: "Absolutely not. Absolutely not."*

> *Arters: "It's all about their aspirations and moving on, and nothing to do with what you just said. It's all about achievement and err … doing better than they had in the past."*

In the final line of the creative director's response it became clear that the expression of high achievement related to more than financial performance. Whilst the expression was concerned with achievement it was also, in the director's words, concerned with 'moving on' and 'doing better than they had in the past'. Again the term 'moving on' was interpreted as a further reinforcement of the disassociation from tobacco. Furthermore, the comment that Altria was concerned with 'doing better than they had in the past' appeared to reflect a more socially responsible attitude – also an appealing attribute for investors and the financial community.

The second message was the concept of 'diversity', which was expressed through the multicoloured mosaic symbol. This idea was intended to emphasize the 'diversity' of the holdings and to reinforce the notion that the organisation is not focused on one industry but a range of industries. In other words, the message of 'diversity' expressed a message connected to the organisational activity, which further supported the finding from the archival analysis that organisations move from specific activity expressions to abstract expressions over time as their activities expand.

> *Arters: "So the intention at the time, when we designed that logo, it was to represent the wide variety of consumer brands that they owned. The core idea of that identity and the*

mosaic, as we call it, was the supermarket shelf that has all these bright colours that speak to consumers."

Jamie: "That's interesting."

Arters: "I think that it [the logo] reflects their diversity, it reflects their energy and passion. It is difficult to get everything into a logo that's for sure. I think that the logo was really meant to say that they're not about one thing but about many."

It became apparent that, unlike other holding companies, Altria had no intention of expressing a portfolio summary. The strategy was primarily concerned with becoming involved in industries other than tobacco, therefore moving beyond its historical associations with a single product by diversifying its activities across a range of products. Whilst the synergies between a diverse portfolio remained unclear, the emphasis was not on specific product sectors but on higher performance – both financially and ethically. This strategy was understandable when considering the organisation's experience; such direct association with a specific product in the past, which had since become socially unacceptable, revealed the limitation of owning a portfolio of negative product brands. From this perspective, the lack of specificity in the brand expression and the migration to a more generic expression is unsurprising.

6·4   Explanations of attitude expressions

The two following cases featured expressions of organisational attitude in their brand marks. The interpretation of interview data relating to both cases is discussed around the four dimensions that underpinned each case: i) situation, ii) audience, iii) appeal, and iv) expressions.

Orange's situation and their brand audiences
In 1994 Hutchison Whampoa become the fourth mobile phone operator to enter the UK market by establishing a new brand called Orange (Evening Standard, 1994). At that

time mobile telecommunications technology was developing rapidly and the cost of ownership was decreasing, thereby becoming a high growth market (The Times, 1993). This technological revolution was reflected in the brand identities of Orange's competitors: the nomenclature of Cellnet appeared to be based on a contraction of the terms 'cellular' and 'network' (Cisco Systems, 2000). Meanwhile, Vodafone's initial visual identity made explicit reference to the graphic language of telecommunications through its use of the line as a graphic device in its logotype. However, despite these technology-orientated brand expressions, there were no technological advantages held by any of the competitors and, therefore, cost was a decisive factor in gaining market-share.

> *Robbie Laughton: "At the time you've got a crowded market … all competing with price and technology language. And it was very aggressive and it was all kind of like … all about the deal. It was not commoditised but it was all like kind of buy-one-get-one-free, you know all £9.99 and all price led. So actually coming to the market with the name Orange but also with an attitude that was about … it looked at everything through the eyes of optimism, so that even meant that it's pricing structure would … kind of equate to that as well. So it launched with the second billing; everybody else was rounding it up to the minute, so people were getting ripped off. So that kind of … that actually was a ray of sunshine for people … that you've got this brand that's very honest and clear in the way that they're actually presenting themselves and packaging things up. And, when it actually boils down to the nitty-gritty, they've got a great offer and they've put something on the table that people thought 'actually I believe in you'."*

In describing the market conditions at the time of Orange's launch the creative director alluded to the market lacking differentiation by stating that it was 'price led'. Whilst this seemed to contradict his previous statement that the market 'was not commoditised', the distinction here seemed to be an acknowledgment that the term 'commodities' often related to physical products rather than services. The brand's emphasis on positioning against competitor's offerings made it apparent that the primary audience was a consumer audience, and that the point-of-difference was in the service experience.

> *Laughton: "It revolved around values. When you create a brand, it's not just on the outside it's on the inside as well. And the values were behavioural and it's how people in the business … behaved in order to do the day job. And therefore they created a business that was based on values and the brand therefore was reflected both inside the business and outside as well."*

Later in the discussion it was explained that this brand was also directed internally, as a mechanism for reinforcing the optimistic 'attitude' expected to be delivered by Orange's staff. The creative director made the point here that, as Orange was an intangible service brand, the organisational values would be experienced – to some extent – by consumers through the interaction with Orange's staff. Therefore, in order for the brand to achieve alignment between all of its brand touchpoints, the brand expression needed to be aimed at an external and internal audience. The internal audience, however, could be considered as a secondary audience based on the observation that the values were *cultivated* in order to appeal to a market need, as opposed to the brand merely articulating an intrinsic corporate philosophy that had simply permeated the organisational culture.

Forming the brand expression

The creative director referred to the market as 'crowded' and 'competed with price and technology language', thus lacking in differentiation. However, whilst the market was price led, complex pricing structures made direct competitor comparisons difficult. As such, the creative director's description of the market suggested that, as the existing organisations were leaving customers feeling 'ripped off', the market was orientated around the service providers' best interests rather than consumers. In recognising this situation the creative director explained how the idea of displaying a more appealing set of values would offer 'a ray of sunshine for people'. Part of the appeal, it seemed, was in offering something unique to the market, such as billing by the actual second and not rounding-up to the next minute. By ensuring that customers were not being 'ripped off', these operational distinctions provided an alternative approach that was recognisable by consumers. The result, according to the creative director, was a brand that was considered 'very honest and clear in the way that they're actually presenting themselves'.

Jamie: "Why were values used as the primary expression?"

Fox: "Well, I mean, at the point everything was kind of – you know – they were all called Vodafone or … Phones4U or … something like this, so … you know it was kind of very literal. And … what you're trying to do, of course, is to tap into why people buy from an emotional level and what people want from an emotional level. And, of course, what people want is the sense of optimism that being in contact with the world can provide. So it was an alternative – at the time – to all this kind of technology-orientated stuff."

In support of the creative director's view of the situation, the strategy consultant on the case described the market's fixation with attribute expressions, as opposed to benefit expressions. His description of Orange offering 'an alternative … to all this technology-orientated stuff' alluded to the fact that there were no available technological advantages, which led to the market to use price as the sole means for consumers to discriminate between the three existing service providers. This, therefore, legitimised the strategy of developing the Orange brand to appeal on an 'emotional level', often considered a smarter long-term strategy. The strategist's reference to people's desire for 'optimism' acknowledged the recognition that there was a consumer need for better customer service; so rather than making consumers feel 'ripped off' Orange's strategy was based on delivering a more trustworthy service experience, presented under the banner of 'optimism'.

Figure 6·10. Title: Orange brand mark.

In assimilating these individual accounts it became clear that the formation of the brand expression was devised to offer a distinct point-of-difference. The brand consultants recognised that, as a service-orientated brand, greater emphasis should be placed on the values that underpin any successful relationship: a feeling of honesty and trustworthiness. It seemed, however, that before the launch of Orange the existing service providers failed to recognise the concept of consumers having a relationship with brands. As such, the market was not providing what consumers wanted and, accordingly, Orange sought to fill this gap through the expression of 'simplicity' and 'honesty'.

Visualising the brand expression

In 1993, prior to Orange, there was a mobile telecommunications operator named One-to-One, whose name conveyed explicitly the benefit of the technology. Its brand mark used two overlapping rectangles that, in accommodating the nomenclature, changed colour to metaphorically suggest a connection. In this context, the name Orange could be seen as similarly metaphorical, whereby the use of a secondary colour, derived from the combination of the two primaries of yellow and red, could express the concept of 'connection'. Accordingly clarification was sought from the brand strategist:

> Jamie: "From a designer's point of view I wondered whether the name Orange, which as a secondary colour, might have been used as a brand name to express the idea of connection … you know the connection between red and yellow."

> Rob Fox: "No. It's purely associated with the psychology of the colour orange. If there is the colour orange in a room it's the first thing you notice. So it's a good colour to use from a colour psychology perspective. Secondly … orange is the colour of optimism, right? It's the colour of sunsets, sunrises and all the rest of it. So it's that straight forward. It's … err …"

> Jamie: "So it's an expression of values?"

> Fox: "Exactly!"

According to the brand strategist the colour was chosen because it is 'the colour of sunsets, [and] sunrises', and therefore the association was that 'orange is the colour of optimism'. Orange's use of the term 'optimism' seemed to contain a superlative undertone, in the sense that it suggested an expectation of the best conceivable outcome. After explaining the brand nomenclature the strategist confirmed that the choice of name was 'that straight forward'. This comment seemed to reflect the intended simplicity and the honesty of the brand, in the sense of being 'straight-forward'. Similarly the creative director explained that the brand was 'very honest and clear in the way that they're actually presenting themselves'. This comment alluded to the visual language of the brand, whereby the square symbol was a simple shape and the colour of the symbol was rendered with a flat use of colour (without a gradient), thus further reinforcing the value of being simple. Furthermore, the use of the orange colour alongside the Orange brand name provided a tautological accuracy that seemed to visually convey the value of 'honesty'.

The Orange brand prioritised expressing the values that had intrinsic appeal to consumers and provided a distinctive point-of-difference for consumers. The creative director's choice of metaphor appropriately signified the visual distinction and the intrinsic appeal of the brand, when he referred to it as a 'ray of sunshine' for most people. The clear and consistent expression of brand values was most apparent in the marketing communications activity, such as the use of single-word headlines set in a simple, linear, bright orange typeface on contrasting black background.

Klöckner & Co.'s situation and their brand audiences

Klöckner & Co. was a multi-metal stockholding and distribution company that originated in Germany during 1906, and subsequently became well-established within the steel manufacturing industry (Morgan, 1998: 110). Envisioning a decline in the steels industry the organisation diversified into chemicals, oil and textiles. Such forays eventually led to difficulties and resulted in the organisation being acquired by Deutsche Bank in 1982, and subsequently by VIAG in 1990 (Kloeckner, 2010). Thereafter the organisation pursued a programme of divestment and began to focus on its core activity of multi-metal distribution (Kloeckner, 2010). Whereas Klöckner & Co.'s original activity was in the production of steel, they had now moved up the value chain to become a specialist distributor of

metals. Their growth strategy was to expand its geographical capability through the acquisition of steel stockholding businesses throughout Europe and North America, thereby becoming a truly international organisation (Morgan, 1998; Wolff Olins, 2000).

Whilst the Klöckner & Co. name remained synonymous with the production of steels, many of their acquisitions had retained their original names and not the Klöckner & Co. nomenclature (Morgan, 1998: 110). As such, greater synergy was needed between the companies within the organisation (Morgan, 1998: 112) and, therefore, the audience of the rebranding activity was internal: 'Klöckner is operating in a closed, professional market, so the emphasis was on using any new design as an agent for internal change rather than for external perceptions.' The director's reference to a 'closed market' suggested that the various companies within the organisation were firmly established and had favourable brand equity within their geographical location. As such, the rebranding was aimed at an internal audience rather than an external audience.

Forming the brand expression

In describing the details of the case (Morgan, 1998: 112) the creative director explained that the consultants recommended a 'strategic shift' to the senior management of Klöckner & Co.: 'We put it to them that they were not in the business of shifting steel but satisfying their customers.' Here the director's comment signposts the paradigm shift, in which the focus of the business was conceptualised as service-orientated rather than commodity-orientated. However, as the rebranding was directed at an internal audience, the aim seemed to be concerned with conveying to staff a greater focus on the service aspect of Klöckner & Co.'s companies.

> *Lee Coomber: "I think the difficulty with their business is multi-metal distribution. Actually the value-added service is in the … in the repackaging of the metals into a basic usable product, right?"*

> *Jamie: "Right."*

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Coomber: "So it's just taking it beyond a sheet, if it's a sheet metal and into something that's actually … begins to be fit-for-purpose or fit to be used in conjunction with something else. That's where the value-added and the service comes in. And again, the distribution is part of that but in order to … sort of flag that up to talk about that part … in other words we can get you what you want, you know the dog is a very clear and distinct analogy to that."

It was apparent from the creative director's explanation of Klöckner & Co.'s brand identity that the added value [for customers] of the organisation's services was prioritised as the key message for the brand expression. Whilst it can be assumed that the expression of the 'added value' would be relevant to an external audience, this branding programme was stated as internally directed (Morgan, 1998: 112). The key point here was that the intention of the branding programme was to shift the mindset of Klöckner & Co.'s staff to embrace a more service-orientated approach. This brand expression, therefore, would function as a galvanising mechanism to bring all of the Klöckner & Co. companies into alignment with the attitude of prioritising customer service. Furthermore the expression of Klöckner & Co.'s 'added value' would signify the 'fit-for-purpose' specialisation of their services.

Klöckner & Co.s brand expression was relevant to internal staff, as the intention was to raise awareness of the organisation's strategic shift: Klöckner & Co. was 'not in the business of shifting steel, but satisfying their customers' (Morgan, 1998: 112). However, whilst there was no explicit reference to an external audience, the creative director did allude to an external appeal in his reinterpretation of the brand expression: 'we can get you what you want', and 'the dog is a very clear and distinct analogy to that'. This message, therefore, can be considered to have direct relevance to a customer, and an intrinsic appeal to an external audience. Alongside this external appeal, the identity also contained an accompanying descriptive strapline: multi-metal distribution. With reference to the statement that Klöckner & Co. operated within a 'closed market', it would seem that the descriptive strapline served as a clarification device intended for an external audience (Morgan, 1998: 112).

When considering the aforementioned points it seems that the Klöckner & Co. brand expression had two objectives: the first was directed at an internal audience to reinforce the focus on a service-orientated approach. The second was directed at an external audience to (1) reaffirm the specific activity through a descriptive strapline; and (2) convey what the creative director considered to be the key point-of-difference and the most appealing aspect of Klöckner & Co.'s service – excellent customer service, as symbolised by the dog retrieving a ball.

Figure 6·11. Title: Klöckner & Co.'s brand mark.

'Excellent customer service' is a highly generic expression for a very specific activity. Klöckner & Co.'s symbol could apply to any service that involved some aspect of customer service. Such a proposition, therefore, would provide a point-of-difference only in a context where the specific activity is already known, such as in situations where the organisation is established or operates in a closed market. However, in both of the aforementioned situations it would seem unnecessary to introduce a descriptive strapline, such as 'multi-metal distribution'. Furthermore, this strapline is not a reduced component of the visual identity; it is an integral part that is afforded the same letter size as the brand name, and situated directly adjacent to the brand name (see figure 6·11). Therefore, it could be that, given the geographical expansion of Klöckner & Co and the endorsing role that the brand fulfilled, awareness could not be fully assumed and, thus, the strapline was considered an interim fixture. Regardless, the presence and the hierarchy of the descriptive strapline suggest necessity, which in turn implies uncertainty of brand awareness. It seems the brand expression was influenced by two factors: the audience's awareness of the organisation and the assumed audience appeal of the 'added value' provided by the organisation.

Visualising the brand expression

Klöckner & Co.'s expression of customer service was symbolised, according to the creative director, in a 'very clear' way through the dog retrieving a ball and conveying the notion 'we can get you what you want'. In a sense this metaphor seemed to be a 'distinct' expression of excellent customer service for two reasons: first, the dog implied a relationship, in terms of the customer being in control, i.e., being the one who is dictating the ball throwing. Indeed Klöckner & Co.'s own statement on its symbol, as displayed on its corporate website, states that 'the ball [is] symbolic of our role to fetch and carry for our customers' (kloeckner.com). Second, the symbol suggests an important quality that is typically associated with a dog – a loyal friend. The notion of friendliness is further reinforced through the outline rendering of the dog, which evokes a light-hearted spirit. Furthermore, the outline of the dog minimizes the animal's visual dominance and, as a result, places visual emphasis on the red, solid ball – the link to the product, which is the customers' tangible outcome. Additionally, the implied relationship and the activity symbolised here is not culturally bound, and so this symbol could be considered as universally appealing – perhaps why the creative director used the descriptions 'distinct' and 'very clear'.

The notion of friendliness appeared to be further reinforced through the all-lowercase logotype, which was set in a relatively informal typeface (when considered in a corporate context). This brand attitude seemed a prominent feature in the design of the symbol, as the creative director explained: 'It had to be a simple outline, like a cartoon image, because it had to be light, a little naïve, and slightly whimsical at the same time' (Morgan, 1998: 114). It is apparent in the creative director's description of the design that the image had to be both friendly but professional, and therefore the symbol could be cartoon-like but not too pronounced, so as to undermine the corporate feel of the identity: the dog symbol was only a 'little naive' and 'slightly whimsical'. This implied subtlety was reaffirmed by the creative director's explanation of the colour decision-making: 'Red's the colour of a ball, isn't it? … that you throw … has to be really. There's nothing cleverer than that, really. And then blue to add some reassurance and dependability.'

6·5   Overview of findings and the formation of a theoretical explanation.

The previous section discussed the interpretations of the interview data and explored the issues in relation to each of the cases. The discussion of these cases was structured around the commonality of expression between the brand marks. This section expands on the analysis by focusing on the comparisons between the cases, from each of the three theoretically interesting brand expressions: purpose expressions, activity expressions, and attitude expressions. After presenting an overview of the findings this section uses the interpretations of interview data to generate a formative explanation of brand mark expressions, as observed in the findings from the analysis of archival data.

Signifying aspirational purpose

1. When looking at the brand marks of diversified organisations the interview data revealed that these typically expressed messages that encapsulated the link between core activities. This type of expression can be classified in one of two ways: (1) an expression of purpose that conveys an appealing benefit. An example of this would the case for Diageo, whose operative word in the overall expression 'pleasure' served as a benefit-orientated portfolio summary of its alcoholic beverage brands; or (2) an expression of purpose that conveys a broader message of the aggregate impact of the organisational activities. The case for Unilever, whose brand mark sought to convey 'vitality' – as a shorthand expression for the statement 'adding vitality to life' – is an example of such an approach. This emphasis on expressing the organisational purpose through a benefit or its impact appeared to be a means of conveying organisational aspiration in a relevant and ultimately appealing manner.

This interpretation relates to the archival analysis, in the sense that purpose expressions are forms of organisational aspiration. However the cases that were explored through interview data revealed a key distinction from those in the archival data: the aspirational expressions from the interview interpretations were specific aspirations, whereas the aspirational expressions present in the archival analysis were highly generic, i.e., right-facing devices and generic references signifying international ambition. This distinction between

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the two types of aspiration explains why these cases could not be readily captured with the Olins framework, and thus worthy of further exploration.

2. Aspirational purpose expressions were selected because of their ability to project appealing messages to multiple audiences. The analysis of the cases that had undergone merger activity (Diageo and GSK) revealed that these brand marks had projected an organisational purpose and an organisational attitude (brand values) to their internal audience in order to galvanise their employees into accepting the integration of the merged organisations. Additionally these aspirational purpose expressions held appeal to external audiences, in that the financial community typically consider such expressions as appealing because they can be seen as an indicator of strategic direction. The cases for Unilever, Smith & Nephew, and GSK sought a consumer audience – in addition to an internal audience – and expressed their aspirational purpose in a beneficial way, which presented an appealing message to their respective audiences. Therefore, aspirational purpose expressions, conveyed in a beneficial way, appeared to be a useful form of brand expression for large diversified organisations that sought to appeal multiple audiences.

3. The interpretation of cases for Unilever and GlaxoSmithKline demonstrated that these organisations, alongside expressing aspirational and beneficial purposes, sought to convey their organisational attitude through their brand marks. Both organisations were making a transition from a branded model to an endorsed brand architecture model to increase their consumer presence. The explanation for this transition was that the parent organisations sought to endorse their product brands, thereby initiating a consumer relationship with the corporate brand in addition to their product level brands. Unilever, according to the creative director, had good ethical values and therefore his belief was that Unilever's visible presence on its product brands would add value to a product brand because of Unilever's ethical production values. In this sense it seemed that Unilever was using its brand endorsement in a similar way to that of the Fairtrade brand, where the brand acts as an appealing certification of the ethical production of goods. In this endorsing role the organisational attitude became Unilever's key expression, whereas when used as a sole corporate mark, the expressions were shared across the aspirational purpose, the organisational activity, and the organisational attitude. This interpretation further supports the

observation from the archival data, where it became apparent that organisational brand marks were increasingly conveying multiple organisational facets, as a means of optimising their brand expressions.

The explanation of GlaxoSmithKline's endorsement strategy revealed a focus on the organisation becoming more consumer-facing, and therefore its brand mark sought to express values that were considered appealing to consumers (warm colours, lowercase letterforms, etc). The intention here was concerned with expressing ownership of its product brands and establishing awareness and, subsequently a relationship with consumers through the expression of a warm, appealing attitude. It would seem plausible that such an endorsement strategy, once established, would enable GSK to transmit its credibility to any of its new-to-market medicines.

Signifying organisational activity

4. The interpretation of findings revealed that the scope of organisational activity appeared to be a proxy for the genericism of the brand expression. The case for Cearns & Brown demonstrated that a focused business has the ability to be more specific in articulating organisational activity. By contrast, the case for Altria, where under its former nomenclature had a strong association with a specific product (tobacco), highlighted that its previous nomenclature association was considered an inaccurate reflection of organisational activity, and therefore new nomenclature – Altria – sought to convey the idea of 'diversity' through its brand mark design. This notion of abstracting-away from the specific to the generic corroborates the findings of the archival analysis, where several cases moved from specific expressions to more generic expressions

5. The interview data suggests that the expression of specific activities through a brand mark is either the result of antecedents, such as retaining the use of existing descriptive nomenclature, or to address an issue related to limited audience awareness. The case for Cearns & Brown provided a potential explanation for this issue, whereby the illustrative icon graphically expressed the organisation's combined activity in order to address a lack of audience awareness. This interpretation was corroborated by the case for Unilever, where limited audience awareness – which the creative director quoted a typical retort of

the time: 'who the f★ck are Unilever?' – led to the expression of organisational activities, organisational attitude and organisational aspiration.

These interpretations provided a more thorough explanation of the utility of activity expressions, beyond that of the findings from the archival data. The archival data revealed that activity expressions were typically adopted by new organisations, as highlighted by the number of utility organisations that arose in response to privatisation that occurred during the late 1980s and early 1990s in the UK (mostly through descriptive nomenclature). However, it became apparent that descriptive names were used by new organisations because audience awareness of a new organisation is typical low during the initial stages of organisational formation. The consideration of audience awareness also explains why established organisations have a tendency to reduce their descriptive nomenclature to initials (International Business Machines – IBM; United Parcel Service – UPS).

6. The findings revealed that existing activity expressions were removed from brand marks when audience awareness of an organisation's activities was firmly established. The interview data for Smith & Nephew revealed that the creative director decided to remove the brand's existing symbol of the medicinal cross because it was considered unnecessary for an established organisation whose industry of activity was already known. The creative director's justification was that "it doesn't actually make your brand any more appealing". This interpretation explained the findings from the archival data where rebranded identities typically sought to reduce expressive redundancy, such as contracting descriptive nomenclature (Barclays Bank became Barclays) or contracting to an abbreviation (British Telecom became BT). This interpretation also supported the findings from the UPS case where the recognised graphic symbol signifying activity was removed apparently because it no longer captured the scope of their operations.

7. In relation to activity expressions, the interview data revealed that there were two types of expression: direct and indirect. Direct expressions of activity were observed in the archival analysis, where the specific organisational activity was expressed through either the nomenclature (descriptive name) or the brand mark (pictorial reference). However, through the interpretation of the interview data it became apparent that Altria's brand

mark expressed a message in connection to its activity, but not actually any specific activity. This expression was termed an indirect activity expression. Altria's brand mark projected two primary messages: (1) 'reaching higher' hence the Latin derived nomenclature; (2) diversity, as reflected in the mosaic symbol. The message of diversity was a means of articulating that the Altria was not 'about one thing [tobacco] but about many things'. Accordingly the message sought to address audience awareness of activity and sought to remove specific associations of a specific activity to a generic activity. Altria's strategy was to mitigate a negatively perceived association with a specific product in order to increase the organisation's appeal to its primary audience: the financial community.

Signifying organisational attitude

8. The interpretation of interview data exposed two types of organisational values; the first type consisted of values that were internally ingrained, while the second type were externally cultivated to address an audience appeal. The case for Unilever demonstrated that their internal values, such as having strong ethics, existed within the organisation and, as part of the rebranding process, were considered to hold appeal to their intended consumer audience, hence the prioritised expression within the brand mark. By contrast, the case for Orange exposed the cultivation of organisational values in order to meet a perceived audience need. The telecommunications industry was, to some extent, commoditised and price-orientated. As a new entrant, Orange sought differentiation through the cultivation and expression of distinctive appealing values. These externally informed values became embedded in the organisational attitude in order to bring alignment between the organisational expression and the consumer experience.

This finding provided clarification of an issue that emerged from the archival analysis, in the sense that the expression of values were prioritised in relation to their ability to appeal to the intended audience. The case for Orange suggested that externally cultivated values, which had been informed by the need to project a point-of-difference, had a tendency to be given the most priority in brand mark expressions, whereas internally ingrained values were typically given a secondary or tertiary supporting role (see the next point for further expansion on this issue). Further support for this interpretation was found in the case for

Klöckner & Co. where the organisation placed emphasis on its service performance as a means of signifying a distinctive point-of-difference, and thus an audience appeal.

9. In the cases where internally ingrained organisational attitude expressions were present in brand marks, such expressions were used to provide a supporting role. In other words, ingrained organisational values were not given absolute priority unless this expression alone provided a distinct audience appeal; rather, these attitude expressions were used almost as a style sheet for the design of the brand mark. In the case for Diageo the organisational attitude directly informed the visual styling of the brand mark, whereby the graphic rendering was described by the creative director as 'sober'. The combination of this description and the restrained use of graphic language was interpreted as a reflection of Diageo's socially responsible attitude, in relation to the nature of their products. This was further supported by the brand mark of Unilever, which was described by its designer as reflecting the organisational values in a 'naïve' and 'playful' manner.

A theoretical explanation of brand expressions

The interpretations of interview data revealed that there are eight aspects of brand mark expression. Five aspects constitute the potential expressions available to brand mark designers, while the remaining three refer to the key determinants of brand mark expression. This framework, mnemonically termed the Eight As of brand mark expression, depicts the relationship between the determinants and the potential expressions (see figure 6·12). The subsequent section presents an explanation of the relationship between the multiple aspects of the framework, and draws upon the research findings to support the intrinsic relationships. Prior to this the section explicates each aspect of the framework and makes reference to the contributory literature that informed particular features of the framework.

1. The Arbitrary Expression. The type of expression is where the message has no apparent logical connection and, therefore, has limited independent meaning – at least initially – beyond that of phonetic symbolism. The findings from the content analysis of archival data revealed that the Chevron graphic identity was an arbitrary assignment. The research showed that such random assignments were driven by functional considerations, such

as ease of recognition, visual distinction and the attraction of adopting empty signifiers. Arbitrary expressions function as 'who' pivots, insofar as operating as identificational devices (i.e., brand mark 'X' graphically and verbally represents organisation 'X'). Random expressions are termed Arbitrary because the intrinsic message is intentionally empty – at least initially until associations become established. Arbitrary expressions were noted by Graham and Peroff (1992) in relation to product brand identities, where it was suggested that Arbitrary trademarks offered a greater likelihood of legal protection – due to their unconnected assignment. Aside from Graham and Peroff's focus on the legal considerations of trademarks, there has been no examination of arbitrary brand marks in relation to their expressive capabilities.
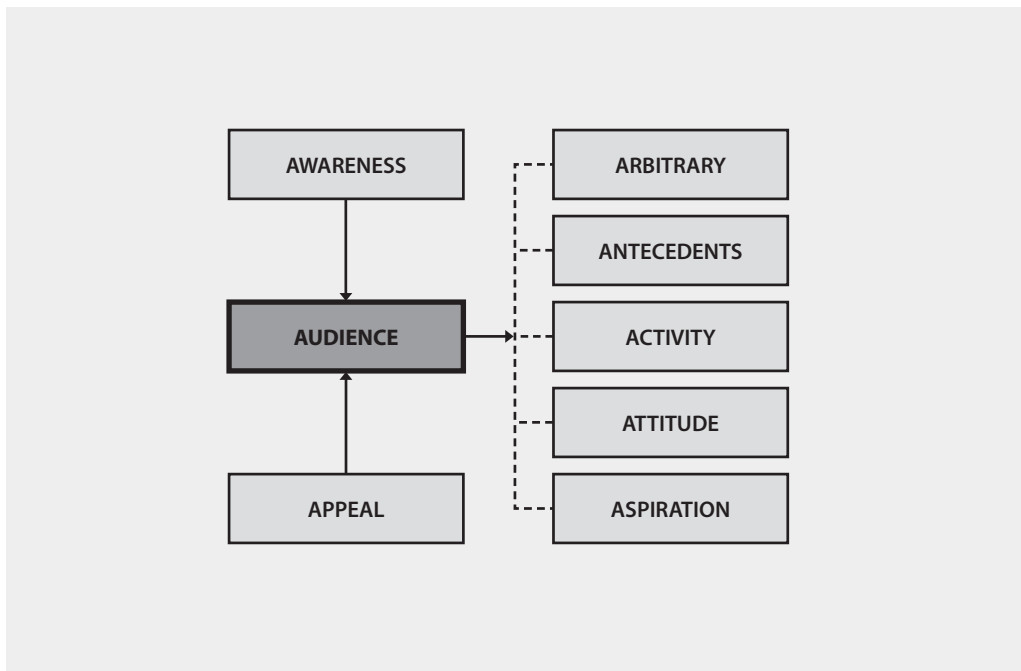
Figure 6·12. Title: The eight As of brand mark expression.

2. Antecedent Expression: This is an expression that conveys a sense of origin, ownership or heritage. Whilst the Antecedent expression also functions as a 'who' pivot, it differs from the Arbitrary expression in that it expresses a message that relates to ownership, and/or origin, and/or heritage. Thus, while the Arbitrary and Antecedent expressions both

register the 'who' of organisation recognition, the Antecedent expressions convey a message that could not be considered arbitrary. In contrast to the previous 'Arbitrary' example (Chevron) the case for Hadfield's Paints revealed that the organisational nomenclature was derived from the founder's surname – a common strategy – and therefore, in addition to conveying the 'who' pivot, also expressed ownership. As previously discussed, Olins's mentioning of the 'who' pivot (1995) offered no delineation of the potential devices that could convey the 'who' pivot within the construction of brand identities, and therefore brand marks.

3. Activity Expression: This type of expression is where priority is placed on depicting or indicating a specific or non-specific organisational activity. Descriptive nomenclature and explicit visual signifiers of activity are the mechanisms that constitute this type of expression, an exemplar being the case for Cearns & Brown. This category is a direct reflection of Olins's (1995) statement that a corporate identity can indicate 'what' an organisation does. However, this Activity expression extends Olins's pivot by attaching greater specificity and operational definition to the expression. Graham and Peroff (1992) suggested that descriptive marks explained or described 'the nature or benefits of the product'. Whilst this observation clearly referred to product trademarks, and it clearly introduced the notion of a benefit, which is a different dimension to an activity expression, it provided a suitable signpost that could be related to expressive devices for organisational brands.

4. Attitude Expression: This type of expression is where priority is assigned to signifying organisational values or a distinctive point-of-difference within the construction of a brand mark. This type of expression extends from Olins's suggestion that a corporate identity could convey 'how' an organisation does what it does (1995). Here Olins alluded to the manner in which activities are undertaken, from the perspective of organisational attitude, and to the competitive performance aspect of organisational operations. Graham and Peroff's (1992) observations are related to this when they made reference to 'suggestive' trademarks, where they described how such trademarks explicitly suggest a distinctive product benefit. Graham and Peroff's observations, however, are problematic in the context of this research insofar as they focus on the mode of expression (i.e., de-

scription or suggestion) rather than the content of the message, which was assumed to be orientated around a product benefit. The Attitude Expression combines the competitive dimension of Graham and Peroff's product brand observations with Olins's allusion to organisational performance.

5. Aspirational Expression: The final type of expression is an Aspirational expression, which constitutes the visual suggestion of either a specific aspiration of organisational purpose or a generic expression of ambition, such as right-facing or upward-facing graphic devices. Olins's mentioning of the where pivot inspired the Aspirational expression, however this research explicated the construct into an explicit expression with specific graphical devices (1995). The Aspirational expression conceptually relates to the literature that suggests corporate identity is a vision-orientated activity (Olins, 1995, 2003, 2008; Jones, 2000, 2001; Wheeler, 2009) and extends this abstract conceptualisation by formulating a more specific typology of expressions.

6. Audience: The findings from the research revealed that a brand's Audience was the key determinant in the prioritisation of a brand expression in the construction of a brand mark. The term Audience, which refers to a brand's internal and external stakeholders, was chosen instead of the more commonly accepted term of 'stakeholders' for three reasons: (1) It became apparent in the findings from the Orange case that the intended recipients of the brand message was an external audience that had, at the point of launch, no relationship or awareness of the new organisation. From this perspective these intended targets of the brand were not existing stakeholders, but potential stakeholders. (2) Use of the term 'stakeholders', the author felt, implied a relationship beyond that of being recipients of brand messages. It was clear that, in a number of the cases used in this research, stakeholder perceptions were not extensively considered during the design process beyond the role of verifying the relative accuracy of brand mark interpretation. As such, the term 'Audience', in the context of this research project, was considered a more accurate reflection of the passive nature of the Audience's interpretive role. (3) The term 'Audience' suitably contained an initial that facilitated the continuation of the mnemonic configuration.

7. Awareness: This determinant refers to the Audience's Awareness of the brand, and is thus connected to the previous determinant. The term refers to the level of awareness of the intended audience's prior knowledge of an organisation, in relation to the antecedents, activities, attitude, and aspirations. In this sense 'awareness' differs to the construct of organisational reputation, insofar as the former relates to the intended Audience's elementary knowledge of an organisation, whereas the latter suggests a more informed perspective (i.e., personal opinions, 'vivid impressions' and 'emotional connections') held by individuals often with a vested interest in an organisation (Alvesson, 1990; Fombrun, 1996; Van Riel and Fombrun, 2007). The Awareness determinant, accordingly, encompasses a more narrowly conceived frame of reference than that of the reputation construct.

8. Appeal: This determinant refers to the conceptual attractiveness of a given expression, from the perspective of the primary Audience. This determinant is therefore connected to the previous one, in that the relative Appeal of an organisational expression is dependent on Audience Awareness of the organisational brand (i.e., its antecedents, activities, attitude, and aspirations), which consequently introduces a contextual dimension to the determinant. The Appeal of an organisational expression constitutes the attractiveness of an expression in relation to the surrounding competitive environment, and therefore this determinant addresses the aspect of differentiation. Accordingly, an organisational point of difference is an expression that invites comparative evaluation from an audience's perspective.

The relationship between the determinants and the possible expressions can be seen in figures 6·12 and 6·13. The three boxes on the left show the determinants, while the five boxes on the right show the possible expressions. This relationship is depicted through the use of either solid or dashed lines: solid lines represent a consistent influence, while a dashed line represents a variable connection (this should become more apparent as the explanation progresses). The three determinants of a brand mark expression inform – to a differing extent – the prioritisation of the five possible brand mark expressions.

The key determinant – a brand's Audience – is the primary consideration in the prioriti-sation of brand mark expression; its importance is emphasised in the Eight As framework through the use of a darker contrasting box. As previously stated, a brand's prioritised expression is determined by its relevance to its key Audience, which inevitably is directly informed by the Audience's Awareness of the organisation, in terms of its Antecedent, Activities, Attitude and Aspirations. Specifically, the relevance of a brand's expression has to be examined against the Audience's Awareness of the organisation; without establish-ing Audience Awareness, the relevance of brand expression cannot be determined. As such, there is a direct relationship between the Audience and the Awareness. The cases for Smith & Nephew and UPS (2003) exemplify how audience awareness of activities influenced the removal of activity signifiers. Similarly, the cases for Unilever and Cearns & Brown revealed that a lack of audience awareness influenced the prioritised expression of organisational activity in the respective brand marks.
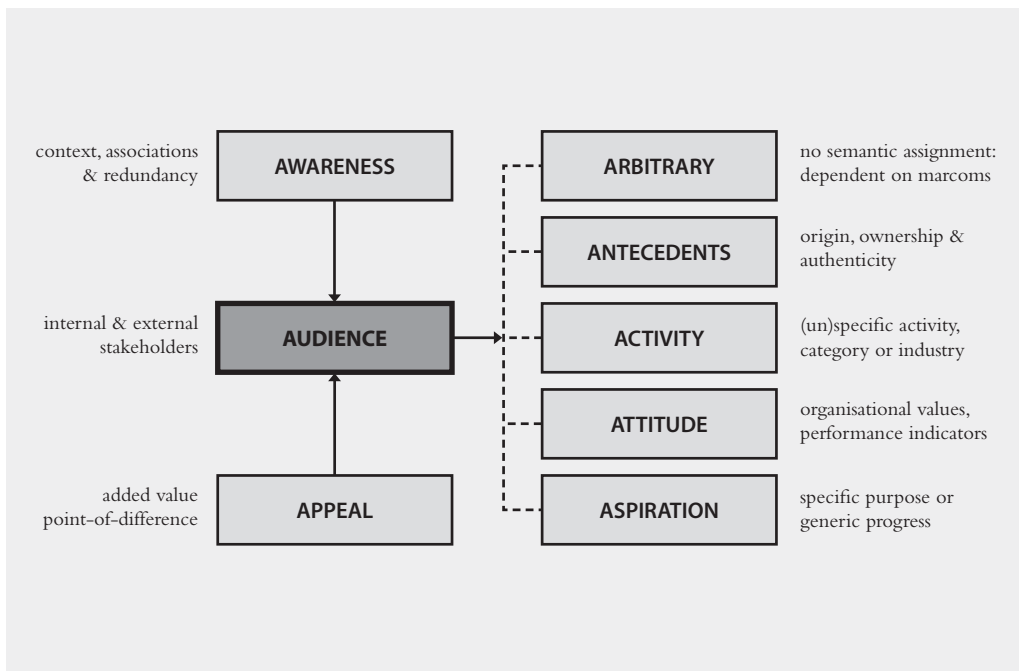
Figure 6·13. Title: The eight As of brand mark expression (expanded).

The concluding relationship of determinants is the linkage between a brand's Audience and a brand mark's Appeal – the conceptual attractiveness of the brand expression. Whilst the relationship between the audience and its awareness highlighted the need to understand an audience's position in relation to their prior knowledge of the organisation, this second relationship between the audience and the appeal of the brand expression introduces a greater focus on the contextual considerations of a brand mark expression. In other words, the relative appeal of an expression has to be determined in relation to the competitive context in which the organisation is situated. In the case for Philip Morris Companies it was apparent that the brand nomenclature was too closely associated with its core product of tobacco (in spite of the group holding a more diversified portfolio). As such the audience's awareness of this risky association – in terms of the probability of emergent negative publicity from tobacco litigation – resulted in the construction of a disassociation of a singular product class. This change of expression provided a less risky, and therefore more appealing, expression to the organisation's key audience – the financial community. Indeed it emerged that the financial community favoured aspirational expressions because an explicit vision (attitude expression) is regarded as an indicator of direction and strategic intent). Comparably the case for Orange illustrated that, in a competitive environment of attribute-led activity expressions, an attitude expression held greater audience (in this case customers) appeal.

The findings of this research, upon which this theory is formulated, suggests that in order for brand identities to achieve – and maintain – relevancy, brand consultants have to consider the primary audience and their awareness of the brand (the context of the organisation) and the appeal of any potential expression. Collectively, these three determinants influence which of the possible expressions are prioritised within the design of a brand mark. The connection between the determinants and the expressions can be generalised in the following way: (1) Arbitrary expressions are typically used by organisations in either growth industries or organisations with sufficient resources to support such expressions through additional marketing and corporate communicative functions (additional communications to bring meaning to an abstract device). (2) Antecedents are typically prioritised when authenticity, or an established heritage, provides a means of distinction and, thus, audience appeal (an example of this would be the brand identity strategies of

traditional universities). (3) Activity expressions are prioritised when organisational activity is either unknown or misunderstood, and thus is often the strategy of new organisational brands (i.e., descriptive nomenclature and or category signifiers). (4) Attitudinal expressions are typically prioritised when an organisation competes in a mature industry, where awareness of activities is high and in which the customer is the primary audience, and accordingly attitude expressions provide a point of difference to the audience. The case for Orange exemplifies such an approach; furthermore, the Orange findings showed that organisational values were not intrinsic but, instead, cultivated to satisfy external market appeal. (5) Aspirational expressions are commonplace in organisations whose key audience constitute the financial community, in which vision and mission expressions are taken as indicators of strategic direction.

The aforementioned theoretical explanation brings greater clarity and insight to the domain of corporate brand identity in relation to its primary manifestation. Previous literature had implied a number of potential expressions, which provided a platform for this research. The strength of Olins's four pivots emanates from the broad conceptual framing of corporate expression; yet, as a direct consequence of this framing, the pivots are deficient in specificity. The Eight As framework extends Olins's incomplete array of broad conceptual constructs by presenting a more specific formation of expressive devices. The five possible brand mark expressions originated from the synthesis of Olins (1995) and Graham and Peroff (1992), which were developed into a more systematic set of possible expressions. In addition, the Eight As systematic typology of brand mark expression sought to address the vague notion of brand expressions projecting a 'big' idea (Olins 2003, 2008; Jones 2000, 2001; and Wheeler 2009). A distinct feature missing from these earlier literatures was the theoretical understanding of the prioritisation of brand mark expressions, thus there had been no attempt to present a theoretical explanation of the determinants of brand expressions. The Eight As framework addresses this gap in knowledge by presenting an original explanation of the theoretical connections between the determinants and the prioritisation of brand mark expressions.

6·6   Summary

Whilst brand marks can feature a number of expressions, there are usually one or two key messages that become prioritised in the design of a brand mark. Following the selection of a number of theoretically interesting cases this chapter explored the factors that influenced and subsequently determined the key expressions in the design of brand marks. Data generated from interviews with the lead designers of eight of the selected cases were analysed and interpreted, where the aim was to gain clarification and explanations for factors that informed the construction of these organisational symbols.

The synthesis of these data in relation to the archival analysis were presented in a numerical structure, which led to the formation of a theoretical framework, provisionally termed the Eights As of brand mark expression. It became apparent that three of the key factors that influenced the design of the brand mark expression was the consideration of the audience and its awareness of the organisation within context, which subsequently informs the consideration of the organisation's most appealing aspect from the intended audience's position. The complexity of considerations increases with brands that focus on multiple audiences.

The implications of these findings are discussed in the final chapter, where they are synthesized with the earlier findings (presented in chapter 5) and considered alongside the literature presented in chapters 2 and 3.

7 Conclusion and contribution:
Towards a theory of brand mark expression

7·1 Introduction

The aim of this study was to generate a theoretical understanding of the strategic expression of corporate brand marks. It was evident from a survey of the literature that the wider scope of corporate identity and corporate brand management had received increasing attention from scholars. These enquiries were characterised by two preoccupations: the first was concerned with attaining consistency of brand expressions and brand experiences (touchpoints). The second was the related pursuit of devising gap-analysis brand management models for the purpose of achieving alignment across disparate touchpoints. However, the primary visual manifestation of a corporate brand – the brand mark – had largely been ignored by scholars. As such, the conceptualisation and construction of these devices, which are understood to function as concise expressions of corporate strategy, were not understood from a theoretical perspective, in terms of which aspect of corporate strategy becomes the prioritised expression.

To address this gap in knowledge the study sought to gain a theoretical understanding of what expressions had occurred over a fertile period of activity (RQ1), and what explained the prioritised expressions (RQ2). A mixed methods approach was used to address this research issue, where a snapshot of prominent activity was captured using a unique classification tool. By classifying this activity through the analysis of archival data the author was able to see – from the use of descriptive statistics – the changes in brand mark expressions over a period of 50 years. Stage two of the research focused on the exploration of the emergent deviant cases, in addition to the cases that featured ambiguities, through

the analysis of qualitative data generated from expert interviews with direct informants – those directors responsible for the construction of the actual devices. The findings from this study have facilitated the generation of a theory that explains the key issues involved in the selection of brand mark expressions. This theory, the author argues, provides an original contribution to the body of literature (referred to in chapters two and three).

Following this introduction the subsequent section of this chapter synthesizes the findings from the two stages of research (chapters five and six) with the key issues raised in the literature review and draws together the conclusion to the research questions and the underlying research problem. By situating this theory in relation to prior research the theoretical contribution can be explained within context. Thereafter the theoretical implications of the research are explored and the study's original contribution to knowledge is clarified. Subsequently the chapter considers the implications of the research within the practitioner domain, and then reflects on the limitations of the research design and the research findings. Attention subsequently turns to the exploration of the future direction of this research by outlining the avenues for further enquiry. The chapter ends with a summary.

7·2   Conclusions about the research issues and the contributions to knowledge

In relation to the objectives of the study set out in chapter one, this section draws together the findings presented in chapters five and six, and proposes a theoretical framework to explain the prioritisation of brand mark expressions within the design and construction of corporate brand marks. More specifically, this section explains how, based on the empirical data, the study makes two important original contributions to the body of knowledge relating to corporate brand identity. First, the theoretical framework presented in chapter six (Figure 6·12) addresses the issues raised in the literature (chapters two and three) whereby this study's contribution extends beyond Olins's four pivots by presenting a substantive framework with significantly greater explanatory capability. This framework, based on the findings from data, provides a theoretical explanation of the determinants of

brand mark expressions. Second, this study presents an analytical contribution by way of the operationalisation of the Olins's four-pivots framework as a mechanism for systematically capturing brand expressions.

The theoretical framework proposed in chapter six draws on Olins's (1995) suggestion that a corporate identity could project four dimensions of organisational identity, and incorporates the trademark circumscriptions proposed by Graham and Peroff (1992) and Murphy (1992). Additionally this systematic typology of brand mark expression sought to address the vague notion of brand expressions projecting a 'big' idea (Olins 2003, 2008; Jones 2000, 2001; and Wheeler 2009). As such, the Eight As framework extends these incomplete array of broad conceptual constructs by presenting a more specific formation of expressive devices and situates these in relation to the determinants that inform the prioritisation of brand mark expressions, which provides greater explanatory capability. In other words, the selection of brand expressions are considered within the context of the intended audience(s), their existing knowledge of the organisation, and the assumed – or established – appeal of any of the possible expressions. These facets are outlined below.

1. The first facet to emerge from the analysis was the influence of the external audience on the prioritised expression. While Olins (1995: 3) suggested that 'corporate identity could project four things', and later suggested that such projections constituted a 'big idea', and subsequently referred to it as a 'central idea' (1995: 11), such corporate expression assigned little consideration to the external audience and accorded greater importance on the internally-orientated definition. However, the findings presented in chapters five and six, revealed that the external audience was the key determinant of the prioritised expression. This finding stands in sharp contrast to the earlier literatures, which mostly reflected a preoccupation with the internal expression of 'corporate personality' (Margulies, 1977; Olins, 1978; Bernstein, 1984); in a sense this early perspective assigned little recognition of the external context in which the expression would be experienced. This discovery provides empirical evidence that relates directly to the convergence of the corporate identity and branding disciplines, as suggested by Knox and Bickerton (2003), and, more specifically, how this convergence affected the strategic choice of corporate brand

expressions. This finding suggests that the external context has a significant influence on the choice of expression, and therefore extends previous knowledge of how such expressions are informed and determined by the agents responsible for their construction.

2. The second facet to emerge expands upon the previous one in that, in relation to the external audience, the foremost issue in determining the external relevance of any potential expression is the consideration of the audience's prior knowledge of the organisation. As shown in chapter three prior literatures emphasised the potential expressions available to organisational brand marks (Olins, 1989, 1995, 2003, 2008; Jones, 2000, 2001; Wheeler, 2009) but neglected to offer any theoretical apparatus to inform the selection of these potential expressions. In connection to this issue, audience awareness had not been acknowledged in prior literature as being a distinct factor in the strategic selection of brand mark expression. The findings revealed that, without sufficiently understanding the audience's prior knowledge of an organisation the relevancy of potential messages could not be determined. This facet was most apparent in the cases where there was an effort to reduce tautological expressions in brand marks, i.e., using numerous devices to express the same organisational message. An example of this pursuit of economy of expression can be seen in the cases that previously used descriptive nomenclature alongside an explicit, activity-orientated visual device and subsequently removed one of the two activity domain expressions (see section 6·5, notes 5 and 6). Interview data also revealed that explicit consideration was given to audience awareness, as stated in the case for Smith & Nephew (see Appendix VI).

Furthermore the issue of audience awareness was apparent in the comparison of expressions between new organisations and established organisations. The findings revealed that new organisations exhibit a greater capacity for descriptive nomenclature and visual depiction of activity, as a means of pursuing a self-explanatory – and therefore efficient – corporate message. By contrast, activity expressions become irrelevant over time once awareness of organisational activity has been established by prioritised audiences (assuming activity remains unchanged). The cases of privatised utility providers in the UK, from around the 1980s, empirically support this finding, such as British Telecom, National Power, and National Grid (see section 5·7). By the same token, existing businesses that are

misunderstood by their audiences often seek to address such issues through the adoption of explicit brand mark expressions – typically activity expressions. The case for Unilever revealed that, because key audiences were unaware of their activities, the organisation sought to explicitly depict their activities within their iconographic brand mark construction. (See Chapter 6, section titled: Unilever's situation and their brand audiences.) This further supports the interpretation of the findings, whereby organisations prioritise their brand mark expressions according to their audience's awareness of the organisation.

Earlier literature relating to the construction of brand marks were incomplete, in terms of the identification of and understanding how the determinants influence the choice of organisational expression. Whilst Olins (1995) stated that the corporate identity was often 'aimed at' external audiences, there was little to suggest the substantial influence that audience awareness has upon the choice of expression. Similarly, Olins (1995, 2003, 2008), Jones (2000, 2001) and Wheeler (2009) refer to abstract notions of brands as being vehicles for expressing a 'central idea' or 'big idea', and provide numerous examples, but offer an inadequate definition of what constitutes a big idea, or what factors influence the selection and articulation of a 'big idea'. This thesis extends these understandings by delineating how the determinants inform the expression strategy of brand mark design.

3. The third facet to emerge from the findings, also related to the external audience, was the importance placed on the appeal of an expression in relation to its intended audiences(s). This determinant appeared similar to the benefit expressions that characterise product brands, in that expressions gain greater relevancy when intrinsically appealing. Indeed, organisations strive to be perceived in a favourable way – whether through the pursuit of a competitive advantage or social admiration – this determinant influences the brand expression. This finding emerged from the analysis of the Orange case, where its brand strategy focused on the articulation of attitudinal values. This particular expression was selected for its ability to present an appealing point-of-difference within an environment where Orange's competitors – perhaps in a bid to gain legitimacy – adopted similar expressions (see section 6·4). The suggestion, therefore, was that this type of intrinsic appeal occurred within undifferentiated, competitive environments where respective audiences sought an appealing means of discriminating between competitors.

In addition to the aforementioned finding, a similar issue occurred in a number of cases that sought to project an appealing and beneficial organisational purpose. In the case for Diageo it became apparent that the brand's expression constituted a portfolio summary, because it encapsulated the total organisational output. However this was articulated through an abstract benefit, considered to be common throughout the organisation's portfolio. It emerged that, in the cases that expressed an appealing organisational purpose, the intention was to convey the relevance of their purpose and suggest that the organisation was virtuous (see section 6·2). As with earlier findings, audience appeal within organisational expression was not explicitly acknowledged as a pivotal determinant; instead, because these literatures principally conceptualised corporate brand identity as a mechanism for conveying the corporate personality, they alluded to the appeal of an expression by way of considering the problematic territory of corporate personalities that lack externally appealing characteristics (Margulies, 1977; Olins, 1978; Bernstein, 1984; Van Riel, 1995; Van Riel and Balmer, 1997; Van Riel and Fombrun, 2007).

These three determinants, outlined above, provide a framework for explaining the prioritisation of brand mark expressions. By way of example, earlier literature had observed that the majority of corporate brand identity programmes were 'vision-driven' (Balmer and Soenen, 1999), yet this prevalence could not be theoretically explained. The findings in this research, the author believes, propose an explanation: As brand expressions change over time it is evident that, since the majority of brand identity cases are for established organisations, brand expressions typically migrate from prioritising 'awareness' expressions to 'appeal' expressions. Accordingly mature businesses focus on the more strategic expressions of attitude and aspiration, which predominantly hold greater audience appeal.

In a broader sense this research makes a substantive contribution to the literature of corporate brand identity by providing research findings that elucidates the transition from an activity preoccupied with imparting an internally-orientated perspective to a mechanism for conveying the external relevance of an organisation (Hatch and Schultz, 2001, 2003; Knox and Bickerton, 2003; Van Riel, 1995; Van Riel and Balmer, 1997; Van Riel and Fombrun, 2007). Additionally these findings contribute to the literatures relating to the visual manifestations of corporate brand identity by bringing greater attention to a seemingly

esoteric aspect of corporate brand identity activity – brand mark design – and framing the construction of this component in a more transparent and strategic form (Olins, 1995, 2003, 2008; Jones, 2000, 2001; Wheeler, 2009).

From a methodological perspective this thesis provides an analytical contribution, through the formulation of a framework that captures the expressions of corporate brand marks (outlined in chapter four, section 4·6). No such mechanism existed prior to this study. Whilst Olins (1995) had indicated the notion of the four pivots, there was insufficient explication of these constructs to enable a connection from specific brand expressions to particular design manifestations. The examination of brand mark expressions, from a classification perspective, facilitated a process of explicitly linking organisational strategy to specific design characteristics, which assisted in clarifying this creative aspect of corporate brand identity. Furthermore, the development of this typology (formatively presented in section 4·6 and expanded on in the figure 6·12) has established a reliable point of departure for the further development of a diagnostic tool for brand mark designers who may be less informed than designers that reside in the larger specialist brand identity consultancies.

7·3   Implications for theory

This thesis has outlined a theoretical explanation of corporate brand mark expression and delineated a typology of possible expressions, alongside the three determinants of brand expression. This section now considers the implications of this research in relation to the broader literatures located within the management and graphic design domains. The first apparent implication extends to the area of management, where a deeper understanding of the interpretation and application of vision and mission expressions would add to the existing literature. While such aspirational facets have received a consistent stream of scholarly attention (David, 1989; Hooley, et al, 1992; Collins and Porras, 1996; Chun and Davies, 2001; David and David, 2003; Ingenhoff and Fuhrer, 2010) this thesis highlights how such expressions have been translated into the visual manifestation of corporate brand identities.

Furthermore this thesis differs from the existing literature, where the evaluation of textual material characterise the domain, because attention is directed to the analysis of brand mark expressions. The findings from the Diageo case suggested that a conscious effort had been made to retain an element of discretion through the visual expression of the common portfolio benefit of 'pleasure'. However, given the nature of Diageo's product portfolio, this visual expression revealed a graphical acknowledgement of the organisation's position on corporate social responsibility. Indeed visual manifestations – as expressions of organisational strategy – often reflect the priorities of an organisation, i.e., significance is placed on the aspects of a message, considered important, through the rendering of the visual reinforcement of graphic language. This remodelling of aspirational expressions in the visual domain, the author believes, can facilitate a greater understanding how such statements transpire in articulations other than the textual.

The second implication to emerge from the aforementioned contributions draws on the finding that corporate brand expressions appear to be informed and subsequently determined by external relevance. This insight has particular significance to the gap-analysis model proposed by Hatch and Schultz (2001, 2003), which propagated the notion of reducing 'gaps' across the touchpoints of corporate brand identity. One such gap outlined within their literature described a misalignment that can occur between an organisation's image (external perception of key audiences) and organisational culture (ability to deliver on their promises), identified as a credibility gap. The second type of gap was stated as a vision–image misalignment, which emerges when the image (external perception held by key external stakeholders) is in conflict with senior management's typically overly ambitious vision. These two misalignments – of the possible three – centre on the external audience, which the findings herein suggest is the key determinant of corporate brand expression and, therefore, seem to support the Hatch and Schultz model.

The third implication to arise from the contributions outlined in section 7·2 relates to the parent theory of graphic design. Within this domain the theoretical framework presented in chapter six provides a contribution to the graphic design literature by outlining the possible expressions of corporate brand marks. This framework, therefore, provides design researchers with a mechanism for evaluating and classifying corporate brand

marks. Unlike the existing literature in graphic design, where the recommendations for designing corporate brand marks typically advocate highlighting abstract notions of 'big ideas' or the 'essence' of an organisation, this thesis proposes an explicated conceptual framework (section 4·6) that circumscribes the visual devices used in the design of brand mark expressions (Selame and Selame, 1988; Olins, 1989, 1995, 2008; Allen and Simmons, 2003; Wheeler, 2009; Airey, 2010; Bass and Kirkham, 2011; Hyland and Bateman, 2011; Evamy, 2012). Moreover, this study signposts to designers the importance of considering the strategy of the expression in relation to the external audience's awareness and appeal.

The fourth implication relates to the potential significance of the theoretical framework to the education of designers. Extant literature in the domain of graphic design is, to some extent, incomplete, in terms of clarifying the visual expression strategy of corporate brand identities and making the knowledge of this aspect of graphic design accessible (Rand, 1991; Rand, 1997; Olins, 2008; Wheeler, 2009:51; Hyland & Bateman, 2011: 7; Evamy, 2012: 6). A review of these literatures suggests that the creation of brand marks is largely a heuristic process. Indeed there are a multitude of publications that profile detailed case studies on corporate brand identity, which offer substantial pedagogic utility. Such literature often reports on a case-by-case basis (as most cases present unique circumstances); however, this thesis adds to this domain by moving beyond isolated cases and draws together theoretical connections, in order to provide a more systematic explanatory framework.

Furthermore, the Eight As framework could be extended to the teachings of management, where many leading business schools have directed attention to the increasingly important subject of brand management. In this context the framework would better enable management educators to explain the determinants involved in selecting brand expressions and their subsequent translation into visual devices. Furthermore, the linkage to education could promote the continuing refinement of an expression-capturing framework from like-minded scholars engaged in related academic activity. Such expansion could potentially relate to the imposition of greater testing procedures upon the framework. Additionally this theoretical framework may inspire future studies of brand expressions outside the scope of corporate brands (this issue is explored further in section 7·6).

7·4   Implications for practice

As the design of corporate brand marks is an applied discipline, the framework presented in chapter six has direct implications for the practice of corporate brand identity. The transformation of what could be regarded as tacit knowledge into explicit knowledge has at least three implications within the practitioner context. First, as the theoretical framework makes the process of brand mark expression selection transparent, the findings from this study provide senior managers with greater clarity of the lesser-known aspect of brand management. Greater understanding of this part of corporate branding should enable senior management to become more informed about this creative activity, and thus better informed of the strategy of brand expression. With deeper insight of the process, the author believes, it is more likely that expression mistakes, such as the tailfins of British Airways, could be minimized.

More specifically, in the cases for British Airways and British Petroleum, the negative re-actions of these corporate brand identities were principally the result of the translation of brand expressions into visual form, as opposed to the content of expression per se. Not-withstanding this expression-translation distinction, such misconceived expressions could be minimised through the application of the Eight As framework, insomuch as British Airways's expression reflected an internal ambition rather than their external relevance (from an external audience perspective). In this respect, the Eight As framework could be seen as a useful mechanism for motivating brand designers to consider the prioritisation of suitable expressions (for the external audience) in connection with translation of brand mark design and subsequent visual manifestations.

The second implication relates to the dissemination of best practice to smaller design consultancies, many of which may be less informed with specialist knowledge of or-ganisational branding programmes. This explicit framework provides greater clarity and insight in to the practice of corporate brand identity design, and therefore, by promot-ing a strategic approach to mark making from smaller practitioners, should result in a more informed design for small-to-medium sized enterprises. The dissemination of this knowledge may also enable smaller consultancies to grow and compete against the 'big

six' corporate branding consultancies, which could bring greater competition between the providers of corporate identity council. Consequently an increase in competition may stimulate the profession to elevate to a higher level.

7·5   Limitations of the empirical research

Following an appraisal of this study there are two limitations that need to be acknowledged and given consideration. First, the intention of the research design, as outlined in chapter four, was to interview a sample of the theoretically interesting cases from the archival data gathered in the first method of the research. It emerged that after conducting the analysis of archival data there were only a small number of cases that warranted further investigation through interview research. A limitation, therefore, is the relatively small number of interviews conducted – eight in total – in the second phase of the research. However, the cases selected for interview enquiry were driven by their potential for explanatory revelations, in relation to the issues uncovered from the archival data (in accordance with the intentions explicated in chapter four). This way the interviews were driven by specific points of interest, which related to either clarification or an exploration of an emergent issue from similar cases; these were either deviant cases, ones that could not be easily accommodated by the conceptual framework, or cases where a common theme needed clarification. Accordingly the strategy of enquiry was driven by theoretical necessity rather than numerical legitimacy.

The second limitation that became apparent was the time period that had elapsed between the occurrence of the activity and the capturing of the interview data with the direct informants; in the extreme this gap amounted to 17 years post activity. In order to assuage any concerns of this issue, the interviews were held with expert witnesses who had contributed to the construction of the brand marks. In some instances – where feasible – two direct informants were used for one case, in order to compare the responses and therefore increase confidence in the accuracy of recall through the process of triangulation. (Triangulation also occurred in the cases that featured one expert witness through

the use of archival data.) In the cases that contained only one direct informant, priority was given to the individual responsible for the design and construction of the brand mark, i.e. the creative director of a case took priority over a brand strategy consultant, and in all cases, access was gained with the creative director.

7·6   Suggestions for further research

Following an evaluation of this study, it is apparent there are a number of avenues for further research. First, and in relation to the theoretical framework proposed in chapter six, it would seem appropriate to expand upon this framework by identifying cases of corporate branding whose brand mark expression cannot be explained by the theoretical framework. Such an investigation could follow a similar methodological process, whereby archival data could be used initially followed by more detailed interview data for any seemingly deviant or ambiguous cases. This research activity would inevitably result in either of the two following outcomes: (1) confirmation of the utility of the framework or (2) enable the diagnosis of theoretical limitations that would facilitate subsequent iterations of the framework.

On a somewhat related research direction there is the translation of the framework from an organisational brand context to a product brand context. Product brand expressions – in terms of brand marks and nomenclature – have not received sufficient scholarly attention and, as such, this study could potentially be extended to this domain. The formation of a systematic framework relating to product brand identity would be particularly useful for brand guardians operating within the area of product brand management. Furthermore, an investigation of this type would potentially offer a useful comparison between the two brand domains. The outcome of such a study could yield an instrument for understanding and comparing the differences between the two domains of brand identity expression.

Another future direction relates to the extension of the theoretical framework to the wider expressions within a brand's visual manifestations, i.e., the formation of typologies for packaging, press advertising, etc. This type of research could eventually be used to generate a systematic classification of a range of manifestations, thereby expanding the understanding of brand expressions across the entire scope of visual manifestations. Furthermore, the capturing and disseminating of such data could promote scholarly interest in developing further studies across the visual manifestations of brand identities. The culmination of such a study points to an overall typology of visual manifestations, which would then direct attention to the gestalt of expressions far beyond the analysis of isolated devices.

7·7   Summary

This thesis has addressed the incomplete theoretical understanding of the construction of corporate brand marks by exploring a sample of cases from over a 50-year period. The findings from the mixed methods research conducted within this thesis yielded a theoretical framework that captured and explained the determinants of corporate brand expression within the sample of cases. It emerged that the key determinants were the external audience, audience awareness and audience appeal. Furthermore, it became apparent that corporate brand marks increasingly became less concerned with internally-orientated expressions and more concerned with expressions directed at their external audience. The research suggests, therefore, that organisations increasingly define themselves through their relevance to their external environment.

This theoretical contribution was subsequently described within the context of the literature, where its merits and implications were given consideration. The discussion of the implications in relation to scholarship, education and practitioners was expanded upon. A discussion of the methodological limitations ensued, where the acknowledgement and subsequent justification of the interview sample was provided. The focus of this justification centred on the requirements of the research exploration, the quality of the direct informants, and the use of triangulation techniques. The penultimate section of this chapter

addressed the avenues for further research, which was orientated around the testing of the theoretical framework, and the extension of the framework to the product brand domain, and to a wider range of visual manifestations. And finally, this section has attempted to concisely bring together a summary of this thesis.

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Appendices

Appendix I: Sample of brand marks N=100

XEROX

3M COMPANY

ALCOA

REUTERS

S British Steel

Mobil®

Continental Airlines

Hadfields
Paint and Chemicals

AA American Airlines®

Sample of cases from the 1970s

Bovis

ERCO

3M

UNITED

Amtrak

Shell

P&O Ferries

MINOLTA

Dresdner Bank

WARNER COMMUNICATIONS

Sample of cases from the 1970s

EXXON

CITICORP ®

BLUE CIRCLE GROUP

Deutsche Bank

NASA

Chevron

QUAKER

Goldman Sachs

Merrill Lynch

Kodak

first direct

PRUDENTIAL

NP National Power

Legal & General

NeXT

AT&T

Q8

ICI

BP

National Grid
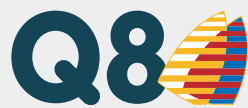
Sample of cases from the 2000s
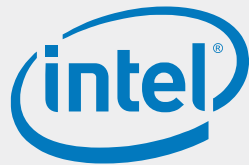
Appendix II: Coding descriptions for conceptual framework

Coding descriptions	
Olins' Four Pivots	*Boundary conditions*
Who	All visual identities signify an organisation. At a basic funtional level, a visual identity is an identificational tool. Therefore 'who' is a default category and applies to all identities.
What	This category refers to visual identities that communicate, either through explicit description or subtle suggestion, the industry of operations or activity of the organisation. The reference, however, has to be explicit, without the need for prior, specific knowledge of the organisation in question. The following types of visual identities are classified in this category: • Descriptive names such as British Airways are classified as 'what' • Recognisable symbols associated with the category of operations, such as the cross in the identity for Bayer, which relates to healthare • Graphical devices that either illustrate or indicate 'what' the organisation do; an example being the use of theatrical masks to inform the crossbars of the letter As for Almeida.
How	This category refers to the way in which a company go about their business – 'how' they do what they do. In many instances, these messages are stated as core values or differentiation. Further, all typefaces – and therefore logotypes – have intrinsic communicative values so could be considered as markers for attitude; indeed, colour has associative values. However, this pivot can only be acknowledged if the meaning is clearly apparent, with an acceptable level of explicitness. The following types of visual identities are classified in this category: • Suggestive names that focus on communicating comparative positions, including operational advantages and/or superior service. An example would be First Direct; • Suggestive symbols that focus on communicating comparative positions, including operational advantages and/or superior service. An example would be the crown symbol in the Hallmark identity. • Graphical attributes and/or devices to communicate differentiation, core values, or an attitude. An example would be the flamboyant letter-style of the Saks identity, or the 'personal' touch in the handwritten typestyle of the Hallmark logotype.
Where	This category refers to the vision or aspiration of the organisation – 'where' they are heading. In the majority of instances, these messages are unspecific and merely generic visual references to the future. The following types of visual identities are classified in this category: • Suggestive names that focus on communicating the future direction or aspirations of the organisation. An example would be the consultancy name, FutureBrand • Suggestive symbols that communicate a more specific future direction or aspiration. An example would be the Helios symbol of BP, as an aspiration to move 'beyond petroleum'. • Generic graphical devices to communicate the future direction of the organisation, such as devices facing, moving or situated to the right (indicative of the future). An example would be the right-facing eagle motif in the Eagle Star identity; or the right-facing arrow in Reckitt Benckiser

Coding classifications	
Olins' Four Pivots	*Examples*
Who	
What	
How	
Where	

Levels of signification (for the purpose of reliably interpreting the major signifiers)	
First Level	Denotation is the literal, obvious meaning of a sign. At this level the sign is not depend-ent on cultural values for its depiction to be recognisable.
Second Level	Connotation is the interpretation of a sign that is determined by the cultural framework of an audience. Connotation is the meanings that occur when denotation interacts with the dominant cultural values associated with the sign and the attitudes, feelings and emo-tions of the audience.

Primary verbal and visual manifestations (for the purpose of identifing the major signifiers)	
Device	*Classifications*
Name	Origin Ownership Arbitrary Suggestive Descriptive
Logotype	Formal Informal Period Stylised
Symbol	Heraldic Creature Organic Geometric Monogrammatic
Colour	Analogous Arbitrary Complimentary Monochromatic Triadic
Vernacular	Photographic Illustrative Linear Solid Patterned Gradient Irregular
Orientation	Alignment Direction Hierarchy

Organisation:					
Designed by:					
Driver of activity:					
Intended audience:	☐ Internal	☐ External	☐ Both		
Year of conception:	☐ 1960s	☐ 1970s	☐ 1980s	☐ 1990s	☐ 2000s

VERBAL UNIT LEVEL OF SIGNIFICATION	
Denotation:	Connotation:

VERBAL UNIT
Name
Arbitrary
Descriptive
Origin
Ownership
Suggestive

PRIMARY VISUAL MANIFESTATIONS LEVEL OF SIGNIFICATION	
Denotation:	Connotation:

PRIMARY VISUAL MANIFESTATIONS			
Logotype		**Symbol**	
Formal		Creature	
Informal		Geometric	
Period		Heraldic	
Stylised		Monogrammatic	
		Organic	

ADDITIONAL GRAPHICAL ATTRIBUTES LEVEL OF SIGNIFICATION	
Denotation:	Connotation:

ADDITIONAL GRAPHICAL ATTRIBUTES					
Colour		**Vernacular**		**Orientation**	
Analogous		Gradient		Alignment	
Arbitrary		Irregular		Direction	
Complimentary		Linear		Hierarchy	
Monochromatic		Patterned			
Triadic		Solid			

OTHER COMMENTS

Organisation:	
Designed by:	
Driver of activity:	
Intended audience:	☐ Internal ☐ External ☐ Both
Year of conception:	☐ 1960s ☐ 1970s ☐ 1980s ☐ 1990s ☐ 2000s

Visual identity:

☐ Who:

☐ What:

☐ How:

☐ Where:

☐ Other:

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Date	Design Consultancy	Client	Industry/Sector	Country	Driver of Activity	audience	Who	What	How	Where	Other
1967	Wolff Olins	British Oxygen Co. (BOC)	Industry	UK	Strategic 3	E	1		1		
1962	Paul Rand	IBM	Technology	USA	Functional	E	1	1			
1961	Paul Rand	UPS	Transportation	USA	Functional	E	1	1			
1960	Paul Rand	Westinghouse	Technology	USA	Functional	E	1	1			
1962	Paul Rand	ABC	Media	USA	Functional	E	1	1			
1961	F.H.K. Henrion	KLM	Transportation	Netherlands	Functional	E	1	1			
1969	HSAG	National Westminster Bank	Financial services	UK	Structural (M&A)	E / I	1		1		
1961	Chermayeff & Geismar	Chase Manhattan Bank	Financial services	USA	Structural (M&A)	E / I	1	1			
1969	Saul Bass	The Bell System	Utilities	USA	Functional	E	1	1			
1965	Design Research Unit	British Rail	Transportation	UK	Functional	E / I	1				
1968	Chermayeff & Geismar	Xerox	Technology	USA	Functional	E	1	1			
1961	G. Stahl & Associates	3M	Industry	USA	Functional	E	1		1		
1965	Minale Tattersfield	Ocean Oil	Energy	Unknown	Functional	E	1			1	
1968	Pentagram	Reuters	Professional Services	UK	Structural (New)	E	1		1		
1966	David Gentleman	British Steel	Industry	UK	Strategic 1	E	1	1			
1963	Saul Bass	Alcoa	Industry	USA	Functional	E	1	1			
1966	Wolff Olins	Hadfields	Industry	UK	Functional	E	1				
1965	Chermayeff & Geismar	Mobil	Energy	USA	Functional	E	1	1			
1968	Saul Bass	Continental Airlines	Transportation	USA	Functional	E	1				
1967	Vignelli Associates	American Airlines	Transportation	USA	Functional	E	1				
						Who 20		**What** 11	**How** 4	**Where** 1	**Other** 0	**Pivots** 36	**Ratio** 1.8

				WHO	WHAT	HOW	WHERE	OTHER	PIVOTS	RATIO
				20	11	4	1	0	36	1.8

NOMENCLATURE:

ABSTRACT	1
DESCRIPTIVE	8
DESCRIPTIVE CODE	7
OWNERSHIP	2
SUGGESTIVE	2
	20

Strategic 1 (misalignment) = Consolidation

Strategic 2 (misalignment) Design/Reality Gap

Strategic 3 (misalignment) Perception/Reality Gap

Function = design improvement

NOMENCLATURE:

NEW	1
EXISTING	16
CONTRACTION	1
AMALGAMATED	2
	20

Date	Design Consultancy	Client	Industry/Sector	Country	Driver of Activity	Audience	Who	What	How	Where	Other
1971	Wolff Olins	Bovis	Industry	UK	Strategic 3	E	1		1		
1974	Ott Aicher	Erco	Consumer Products	Germany	Functional	E	1		1		
1978	Siegel & Gale	3M	Industry	USA	Functional	E	1	1			
1976	Saul Bass	United Airlines	Transportation	USA	Functional	E	1	1			
1971	Lippincott & Margulies	Amtrak	Transportation	USA	Structural (New)	E	1			1	
1971	Raymond Loewy	Shell	Energy	USA	Functional	E	1	1			
1975	Wolff Olins	P&O ferries	Transportation	UK	Strategic 2	E	1	1			
1978	Saul Bass	Minolta	Technology	Japan	Functional	E	1	1			
1972	Saul Bass	Warner Communications	Media	USA	Structural (New)	E	1	1			
1970	Jürgen Hampel	Dresdner Bank	Financial services	Germany	Functional	E	1	1			
1971	Raymond Loewy	Exxon	Energy	USA	Functional	E	1			1	
1976	Anspach Grossman	Citicorp	Financial services	USA	Structural (M&A)	E / I	1		1	1	
1970	F.H.K. Henrion	Blue Circle Group	Industry	UK	Functional (Legal)	E / I	1				
1974	Anton Stankowski	Deutsche Bank	Financial services	Germany	Functional	E	1		1		
1973	King-Casey	Merrill Lynch	Financial services	USA	Functional	E	1	1			
1976	Danne & Blackburn	NASA (worm)	Aerospace	USA	Functional	E	1		1	1	
1977	Lippincott & Margulies	Chevron	Energy	USA	Strategic 1	E	1				
1970	Lippincott & Margulies	Goldman Sachs	Financial services	USA	Functional	E	1		1		
1971	Saul Bass	Quaker	FMCG	USA	Functional	E	1				
1971	Internal Design	Kodak	Technology	USA	Functional	E	1				
						Who	**What**	**How**	**Where**	**Other**	**Pivots**	**Ratio**
						20	8	6	4	0	38	1.9

NOMENCLATURE:

ABSTRACT	7
DESCRIPTIVE	5
DESCRIPTIVE CODE	2
OWNERSHIP	2
SUGGESTIVE	4
	20

NOMENCLATURE:

NEW	4
EXISTING	15
CONTRACTION	1
AMALGAMATED	0
	20

Strategic 3 (misalignment) Perception/Reality Gap
Strategic 2 (misalignment) Design/Reality Gap
Strategic 1 (misalignment) = Consolidation

Function = design improvement

market opportunity   expanded capabilities
consolidated company   change perceptions
new focussed business   outdated image

	WHO	WHAT	HOW	WHERE	OTHER	PIVOTS	RATIO
	20	11	4	1	1	37	1.85
	20	8	6	4	0	38	1.9

Date	Design Consultancy	Client	Industry/Sector	Country	Driver of Activity	Audience	Who	What	How	Where	Other
1989	Wolff Olins	First Direct	Financial services	UK	Structural (New)	E	1	1			
1986	Wolff Olins	Prudential	Financial services	UK	Strategic 2	E	1	1			
1989	Wolff Olins	National Power	Utilities	UK	Structural (New)	E/I	1	1			
1984	Brand Union	Legal & General	Financial services	UK	Functional	E/I	1	1			
1986	Paul Rand	Next	Technology	USA	Structural (New)	E/I	1	1			
1984	Saul Bass	AT&T	Utilities	USA/USA	Structural (restruct)	E	1	1			
1984	Wolff Olins	Q8	Energy	Kuwait	Strategic 2	E	1	1			
1987	Wolff Olins	ICI	Industry	UK	Strategic 3	E	1	1			
1989	Pentagram	National Grid	Utilities	UK	Structural (New)	E/I	1	1			
1989	Siegal & Gale	BP	Energy	UK	Functional	E	1	1	1		
1988	Wolff Olins	Akzo	Industry	Netherlands	Strategic 2	E	1	1	1		
1987	Pentagram	ABB	Industry	Switzerland	Structural (M&A)	E	1		1		
1985	Wolff Olins	Repsol	Energy	Spain	Strategic 1	E/I	1		1	1	
1981	Lippincott & Margulies	United Technologies	Industry	USA	Strategic 1	E/I	1		1	1	
1987	Wolff Olins	Pilkington	Industry	UK	Functional	E/I	1				
1984	Lippincott & Margulies	NYNEX	Utilities	USA	Strategic 1	E/I	1				
1986	Peter Pickhard	Midland Bank	Financial services	UK	Functional	E	1				
1987	Anspach Grossman	Pfizer	Pharmaceutical	USA	Functional	E	1			1	
1989	Michael Peters Group	Ernst & Young	Professional Services	USA/UK	Structural (M&A)	E/I	1			1	
1981	Banks & Miles	British Telecom	Utilities	UK	Structural (New)	E/I	1	1		1	
						Who	20	12	5	6	0

	Who	What	How	Where	Other	Pivots	Ratio
	20	12	5	6	0	43	2.15

NOMENCLATURE:

ABSTRACT	3
DESCRIPTIVE	4
DESCRIPTIVE CODE	6
OWNERSHIP	3
SUGGESTIVE	4
	20

NOMENCLATURE:

NEW	7
EXISTING	11
CONTRACTION	0
AMALGAMATED	2
	20

Strategic 1 (misalignment) = Consolidation
Strategic 2 (misalignment) Design/Reality Gap
Strategic 3 (misalignment) Perception/Reality Gap

Function = design improvement

	WHO	WHAT	HOW	WHERE	OTHER	PIVOTS	RATIO
expanded capabilities — market opportunity	20	11	4	1	1	37	1.85
change perceptions — consolidated company	20	8	6	4	0	38	1.9
outdated image — new focussed business	20	12	5	6	0	43	2.15

Date	Design Consultancy	Client	Industry/Sector	Country	Driver of Activity	Audience	Who	What	How	Where	Other
1991	Wolff Olins	BT	Utilities	UK	Strategic 3	E / I	1	1		1	
1992	Chermayeff & Geismar	Merck	Pharmaceutical	USA	Functional	E / I	1	1			
1994	Landor Associates	FedEx	Transportation	USA	Strategic 2	E / I	1	1			
1994	Wolff Olins	Orange	Telecommunications	UK	Strategic (New)	E	1		1		
1994	Landor Associates	Xerox	Technology	USA	Strategic 3	E	1		1		
1995	Wolff Olins	Lloyds TSB	Financial services	UK	Strategic (M&A)	E / I	1		1		
1996	Wolff Olins	Lucent Tech.	Industry	USA	Strategic (New)	E	1		1		
1997	Wolff Olins	Cearns & Brown	Food Distribution	UK	Strategic 2	E	1				
1997	Landor Associates	Fortis	Financial services	Netherlands/Belgium	Strategic 1	E	1			1	
1998	Brand Union	Hilton	Hospitality	USA	Strategic 3	E	1			1	
1998	Brand Union	Bank of America	Financial services	USA	Structural (M&A)	E / I	1	1	1		
1998	Interbrand	UBS	Financial services	Switzerland	Structural (M&A)	E / I	1	1	1		
1998	Interbrand	PwC	Professional Services	UK	Structural (M&A)	E	1	1	1	1	
1998	FutureBrand	Telefonica	Utilities	Spain	Strategic 2	E	1	1		1	
1998	Wolff Olins	Diageo	FMCG	UK	Structural (M&A)	E	1	1	1		
1999	Landor Associates	European Investment Bank	Financial services	Multinational	Strategic 2	E	1		1		1
1999	Landor Associates	Canadian Airlines	Transportation	Canada	Functional	E	1		1	1	
1999	Interbrand	Barclays	Financial services	UK	Strategic 2	E	1	1	1	1	
1999	Interbrand	AstraZeneca	Pharmaceutical	UK	Structural (M&A)	E / I	1	1			
1999	Brand Union	Corus	Industry	UK	Structural (M&A)	E / I	1	1	1	1	
						Who	**What**	**How**	**Where**	**Other**	**Pivots**	**Ratio**
						20	11	12	8	1	52	2.6

Function = design improvement

Strategic 1 (misalignment) = Consolidation

Strategic 2 (misalignment) Design/Reality Gap

Strategic 3 (misalignment) Perception/Reality Gap

NOMENCLATURE:

		WHO	WHAT	HOW	WHERE	OTHER	PIVOTS	RATIO
ABSTRACT	3	20	11	4	1	1	37	1.85
DESCRIPTIVE	3	20	8	6	4	0	38	1.9
DESCRIPTIVE CODE	3	20	12	5	6	0	43	2.15
OWNERSHIP	7	20	11	12	8	1	52	2.6
SUGGESTIVE	4							
	20							

NOMENCLATURE:

NEW	4
EXISTING	10
CONTRACTION	3
AMALGAMATED	3
	20

Date	Design Consultancy	Client	Industry/Sector	Country	Driver of Activity	Audience	Who	What	How	Where	Other
2000	Landor Associates	BP	Energy	UK	Structural (M&A)	E/I	1		1	1	
2000	Wolff Olins	Klockner	Steel Distribution	Germany	Strategic 2	I	1		1		
2000	FutureBrand	GlaxoSmithKline	Pharmaceutical	UK	Structural (M&A)	E/I	1		1	1	
2000	Landor Associates	Amazon.com	Retail	USA	Strategic 2	E/I	1	1	1		
2001	Landor Associates	Merck	Pharmaceutical	Germany	Strategic 2	E	1	1			
2003	Wolff Olins	Smith+Nephew	Healthcare	UK	Strategic 2	E/I	1		1	1	
2003	Landor Associates	Altria	FMCG	USA	Strategic 2	E	1	1			1
2003	FutureBrand	UPS	Transportation	USA	Strategic 2	E	1		1		1
2004	Wolff Olins	Unilever	FMCG	UK/Netherlands	Strategic 2	E/I	1	1			
2005	Interbrand	AT&T	Utilities	USA	Structural (M&A)	E/I	1	1	1	1	
2005	Lippincott Mercer	Bank of New York	Financial services	USA	Strategic 2	E/I	1	1	1	1	
2006	Brand Union	Credit Suisse	Financial services	Switzerland	Strategic 1	E/I	1	1	1		
2006	FutureBrand	Intel	Technology	USA	Strategic 2	E	1		1	1	
2007	Brand Union	Experian Professional Services	Technology	UK	Strategic 2	E/I	1	1		1	
2007	Lippincott Mercer	Bank of New York Mellon	Financial Services	USA	Structural (M&A)	E/I	1	1	1	1	
2008	Interbrand	RioTinto	Industry	UK/Australian	Strategic 1	E/I	1		1	1	
2008	Interbrand	ThomsonReuters Professional Services	Financial Services	USA	Structural (M&A)	E	1	1	1		
2008	Interbrand	Xerox	Technology	USA	Strategic 2	E/I	1			1	1
2008	FutureBrand	ABInBev	FMCG	Belgium	Structural (M&A)	E/I	1	1	1		
2009	Siegal & Gale	Pfizer	Pharmaceutical	USA	Strategic 2	E/I	1		1	1	

	Who	What	How	Where	Other		Pivots	Ratio
	20	11	16	11	4		62	3.1

NOMENCLATURE:

		WHO	WHAT	HOW	WHERE	OTHER	TOTAL	RATIO
ABSTRACT	3	20	11	4	1	0	36	1.8
DESCRIPTIVE	2	20	8	6	4	0	38	1.9
DESCRIPTIVE CODE	4	20	12	5	6	1	43	2.15
OWNERSHIP	8	20	11	12	8	0	52	2.6
SUGGESTIVE	3	20	11	16	11	4	62	3.1
	20							

NOMENCLATURE:

NEW	1
EXISTING	15
CONTRACTION	0
AMALGAMATED	4
	20

Function = design improvement

Strategic 1 (misalignment) = Consolidation

Strategic 2 (misalignment) Design/Reality Gap

Strategic 3 (misalignment) Perception/Reality Gap

market opportunity
consolidated company
new focussed business
expanded capabilities
change perceptions
outdated image

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UNIVERSITY OF LEEDS

Jamie Marsden
School of Design
University of Leeds
Leeds, LS2 9JT

Arts and PVAC Faculty Research Ethics Committee (PVAR)
University of Leeds

29 February 2012

Dear Jamie

Title of study: **The Analysis of the Communication Strategies of**
                        Corporate Brand Marks
Ethics reference: **LTDESN-003**

I am pleased to inform you that the above application for light touch ethical review
has been reviewed by a School Ethics Representative of the ESSL, Environment and
LUBS (AREA) Faculty Research Ethics Committee. I can confirm a favourable ethical
opinion on the basis of the application form as of the date of this letter.

The following documentation was considered:

Document	Version	Date
LTDESN-003 Ethical_approval .docx	1	23/02/12

Please note: You are expected to keep a record of all your approved documentation,
as well as documents such as sample consent forms, and other documents relating
to the study. This should be kept in your study file, which should be readily available
for audit purposes. You will be given a two week notice period if your project is to be
audited.

Yours sincerely

Jennifer Blaikie
Senior Research Ethics Administrator
Research Support
On behalf of Dr William Rea
Acting Chair of the PVAR FREC

CC: Student's supervisor

Appendix V: Letter requesting access to expert informants

Executive Consultant
Company Name
Address
City
Postcode   1 March, 2012

Dear Consultant

I am writing to ask whether you would be interested in being involved in
a research project into the topic of 'brand expressions', which Professor
Joep Cornelissen and I are conducting at the University of Leeds Business
School.

The purpose of this study is to explore the differences in what
organisational brands have expressed over time. We have already completed
the first stage of the project, which examined over 100 cases – primarily
from Europe and North America – that had some form of intervention by one
of the 'big six' brand consultancies. We now intend to expand on our
earlier findings by conducting a more focused inquiry into the formation
of brand expressions from a selection of cases.

One case of particular interest, which I understand you were directly
involved in, is case 'X', hence my reason for contacting you. My
intention is to explore some of the specific details of the design of
this particular brand mark and its intended expressions. Your involvement
would only require approximately 20 minutes of your time to hold a
conversation via telephone, at your convenience.

All information will be treated in the strictest confidence; only the two
individuals named above will have access to the data. Furthermore in the
event of subsequent publishing of the data, all individuals will remain
anonymous and referred to by a generic title (e.g. Consultant A).

Could we set up a time to have a conversation?

With very best wishes, Jamie

Jamie Marsden
Research Associate
Leeds University Business School
& School of Design
University of Leeds
LEEDS LS2 9JT
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Appendix VI: Topic guide for interviews

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WITNESS:              CASES:              INTERVIEW: 22/05/12


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INTRO:

What was the intention behind the brand expression? Why?

How did this inform the logo design? Why?

(Alignment to pivots?) identification/category/values/vision/other


-------------------------------------------------------------------

SPECIFIC:

Is there any part of the logo that refers to the specific activities
of the organisation?

What was the thinking behind the logotype?

What was the thinking behind the choice of colour?

Are the organisational values incorporated into the logo?
(core/qualifiers/accidental/aspirational)


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IN GENERAL:

How do you decide which aspect of the organisation to express?

When do you prioritise the expression of:

Activity

Differentiation

Core values

Vision?

What determines the level of explicitness of the signifying of
values? Styling? Priority? Any cases where this is apparent?

What frameworks/theories inform the logo design process?


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Close: Gratitude. Any referrals? Contacts?
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Appendix VII: Sample verbatim interview transcript

<u>Telephone interview with the creative director responsible
for the construction of the Smith & Nephew brand mark.</u>

Jamie: The purpose of this study is to explore the differences in what organisational brands have expressed over time. We have already completed the first stage of the project, which examined over 100 cases – primarily from Europe and North America – that had some form of intervention by one of the 'big six' brand consultancies. We now intend to expand on our earlier findings by conducting a more focused inquiry into the formation of brand expressions from a selection of cases.

One case of particular interest, which I understand you were directly involved in, is Smith & Nephew. I'm hoping to explore some of the specific details of the design of the brand mark and its intended expressions. Would that be okay?

Informant: Sure.

Jamie: Also, just before we begin, I'd just like to remind you that all of the information will be treated in the strictest confidence. Only I will have access to the data. And in the event of subsequent publishing of the data, you will remain anonymous and only referred to by a generic title, such as consultant X. Is that okay?

Informant: Yes, that's fine.

Jamie: Great. Also, just to mention, I've got you on a speakerphone so that my hands are free to make notes; also with your permission I hope to record this discussion to enable me to check my note-taking for accuracy. Would that be okay?

Informant: That's fine.

Jamie: Okay … if we could start by you taking me through the thinking behind the Smith & Nephew case.

Informant: Okay, so I'll give you a … I guess I'll just talk a bit about my perspective of brand today because I think that's what you're essentially asking … and I think you maybe get into dangerous territory when you say 'a logo becoming more strategic' … because I actually think the question is about brand and the definition of brand. I don't think logos have become strategic, I think the entire perspective of a business is strategic and the visual expression of that business should be geared by the strategy and the direction the business wants to go in.

Jamie: Yes, yes. There are limitations in the logo, and it's a very small part of a much bigger thing.

Informant: Exactly! Exactly. So I think that's the exciting challenge for businesses today. You know, how can your … focus and mission and … desire for impact in the world be, kind of, expressed not only in all the things you do in the world but also in the way you communicate that to the world. Whether that's through your logo or whether that's through your publications, your advertisements, your actions. I think more so now than ever before brands are defined by what they do and not what they look like. There was a time when what a brand needed to do was to differentiate itself on the shelf. You know, 'are you going to pick this one or that one … this one looks prettier so I'm going to pick that one'. I don't think that's the case anymore. I think that we're much savvier as consumers. And I think people and the world are much more critical of businesses, and therefore businesses have to stand for something in order to exist in the world. So I think that's the kind of big context for … at least my opinion, on what this investigation could be about. So, then, that being said … I'm sorry … why is Smith & Nephew specifically … did you tell me why?

Jamie: Yes. I was curious that their mark [Smith & Nephew] before the rebrand had a symbol of a cross, similar to the symbol of a pharmacy.

Informant: Yes, exactly!

Jamie: … And I was curious as to why that was removed.

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Informant: Okay, I think there's a bunch of … the strategic reasons for that were because Smith & Nephew were moving from a B2B business or a kind of … essentially communicating just to experts in our field to a consumer facing business … in the sense that more and more patients in the world are able to research and investigate their own illnesses and ailments and understand more of what's happening to them. They don't just kind of blindly – or not blindly – but kind of put all their trust in the doctors and the hospital and the medical practice making the decisions for them, but rather they are active participants in their own treatments. And there was a really … kind of … conscious effort that Smith & Nephew wanted to create a brand that would celebrate the people and the … kind of … transformations that they're products created for people rather than just being a business within the medical industry.

Jamie: Right.

Informant: Does that answer? … I mean there are lots of reasons why I can post rationalise … like lots of reasons why we took it away. But essentially that was the main reason and focus why.

Jamie: Yeah. So am I right in thinking that was it about trying to … move away from expressing some kind of category of products towards maybe the benefits of the products?

Informant: Yes! And also, to be fair, anyone coming across Smith & Nephew knows what they are. They don't need to put a plus in their logo for people to know that they're part of the medical … you would never come across them unless you were facing a decision or someone had directed you to them or … you know, this isn't like a product on the shelf that you buy. This is something that your doctor or medical … advisor will be working with. So in that sense the kind of didactic-ness of having a cross is just completely unnecessary, to be honest.

Jamie: Do you mean there's a redundancy to it?

Informant: Not necessarily a redundancy, just almost like you don't need to be strapped to that vernacular of language in order to have relevance in the medical industry because anyone coming across your brand already knows you're part of the medical industry; that doesn't actually give you anymore credibility, it doesn't actually make your brand any more appealing, it's just a symbol that represents the industry that everyone already knows anyway, if that makes sense?

Jamie: Yes, of course. So then moving on to the new symbol, can you tell me a bit about the thinking behind that?

Informant: Well, I think that the symbol came from a few things. One, there was this … desire for the brand to be

able to, kind of, mark and live very vibrantly through its communications, so that it wouldn't be a very kind of static mark, like traditional mark where it just needed to be as a sign-off on an advertisement, but rather that it could be integrated into and be used more functionally. So in some of the communications we used the mark to actually, kind of, almost like a burst to mark a space or a place or an area where Smith & Nephew has touched someone's life. So there's the kind of very specific, didactic thing like a knee replacement where you could put in on someone's knee. That being a mark that it hasn't just … it's not just a kind of pragmatic solution; it didn't just get embedded in their body and then all of a sudden everything's fine, it actually adds transformational qualities to their story as an individual to the impact that they can actually have and the kind of mobility that they can have in their lives, and these stories of people were the thing that we really wanted to focus on. And that's essentially what we did. We did a huge project where we travelled around the world to different areas where Smith & Nephew had identified customers or individuals that had had really impact-full experiences. We interview them and made a movie about it, and we did a lot of research on the real story of how these people's lives had been changed through these kind of medical products. And we interviewed both customers as well as doctors, as well as people in the sales industry that were selling the products because all of the stories were just as important as the end-user story. So the mark being able to, kind of, help us tell the story and be a kind of marker for places and imagery was really important. So that's kind of how it kind of lived, how it became what it is.

Jamie: What was the thinking behind the 'burst', what does it depict?

Informant: The actual shape itself?

Jamie: Yeah.

Informant: I mean it came from … a kind of investigation around a shape or around a series of shapes that weren't closed. That weren't … it could have been a circle or a square or something really … with no personality, and it came form this idea of a star burst or some kind of thing with energy. I think that's where it came from … this idea that the mark needed to have some kind of energy.

Jamie: Right, Okay.

Informant: And of course – through the design process – you know, some of it's just gut feeling, actually creating something that feels visually balanced and appealing, and then some it's from the functionality of it but can it actually mark things and feel energised.

Jamie: Okay. It resembles a person with arms and legs running – was that the intenion?

Informant: That came … kind of … I guess that was part of it … a bit later. I think it's one of those things where you can see lots of things in different marks, especially abstract shapes. And I think that was something that came a bit later. Yes – it kind of looks like that; but that, at least from my recollection of the process, that wasn't the kind of intention from the beginning. The intention was to create something that had energy, that was dynamic, that could be used really kind of flexibly, again, in imagery as opposed to creating some kind of figure that was running. But it does so happen that it also has that quality to it, which was a great thing.

Jamie: Yeah. Yeah. When I read the case study I saw that they had three businesses activities: Endoscopy, orthopaedics and Wound management, which appeared to be summarised in the expression that 'the organisation existed to give people back their lives'. What was thinking behind that?

Informant: Again through a lot of research and discussion with the people that worked within the business as well as the customers, it became so evident that literally people's quality of lives were incredibly transformed by the treatment that they had received from … or that the kind of things that Smith & Nephew was able to help with. And I think in a lot of our research and research stories from, you know, people that had diabetes and, you know, their wounds were so uncontrollable and so embarrassing to them that they were literally not able to be in public. And the fact that, you know, through the things that they

had as well as through these products that Smith & Nephew provided their doctors with, their life was basically given back to them. And I think we heard so many of these stories that it was almost a natural way of articulating what we had seen and heard.

Informant: I think one of the great things about, in my opinion, good branding projects is that we're not inventing anything; we're essentially uncovering or revealing what's already there and really celebrating what's there. You know, we didn't invent what Smith & Nephew does, they already did this already, they had just become very … I guess a bit cold … and un-human in the way of using their brand. And we … you just had to meet some of the people that worked there and how passionate they were about what they did and how knowledgeable they were about their products. We almost just gave them permission to celebrate that, if that makes sense?

Jamie: Yeah, that's interesting. Are you saying that it's a process of revelation?

Informant: Yeah. I think all the branding projects I've worked on that I really feel passionate about and really positive about, that's what we did essentially. We didn't really invent … we invented in a sense of … kind of … created something visual and communicated something that articulated it very clearly. But we didn't invent the sto-

ries that were told, we just unpacked them and helped them tell them tell their story better, if you will.

Jamie: So there's an element of reinterpretation?

Informant: Yeah!

Jamie: So it sounds like it was … a process of designing a clearer expression of the benefit of their collective activities.

Informant: Yeah! I think it is not just clear but also articulate. They weren't able to say what they do in one line: If you were to say 'what does your business do', they could say 'well we make medical devices that do x, y and z' which in the end is a boring story for something that's actually very interesting. And what we said is actually what you do is give people back their lives, and then from there tell people the practical things that you do. But that's the bigger picture, that's the bigger story that you do.

Jamie: Yeah, Yeah. If we can move the focus to the typeface, specifically the rounded letterforms, what was the thinking behind the choice of that typeface?

Informant: That was a custom typeface that we created. We worked with … I forget which font organisation … but we created a custom typeface; again, this idea of making them more human and looking at the kind of competitors in their world as well everyone was using sans serif, very stern, very clinical-looking kind of typography and clinical imagery; and we just listening to the stories and listening to this amazing impact they had on people's lives we really wanted to celebrate a more human quality, and the rounded typeface, that still is very legible and still is very clear but is just much more friendly and much more distinct in that world of medical services. That's kind of where it came from. And also, again, the rounded typeface works very well with the round shapes of the burst. They're all formal attributes to it that just really works.

Jamie: Are you saying it's a process of expressing the values of the organisation?

Informant: Yeah, expressing the values. And also, there's a lot of … they're very reliant on information in their organisation. They have a lot of communication that they have to create, and that can get very tedious and quite boring. And there's something really nice about, even if they're not using any imagery at all, that typeface alone can communicate some very … what could be very kind of difficult information to kind of … to get through … you know medical terminology is not always the easiest to un-

derstand. That typeface alone can help … kind of … loosen up something that could be otherwise quite banal.

Jamie: Yeah, okay. What was the thinking behind the use of the colour orange?

Informant: Well, looking at the competitors of that world, there's a lot of green, a lot of blue, again because I think it's safe and clinical. The orange was a really bright, if you will, a happy thing, because what we were trying to convey were the stories, the transformation, not just the clinical element; and making it orange helped to do that. And also it helped the mark to be very visible in the imagery, and that was really important as well.

Jamie: That's helped to clarify the picture, in that the symbol was not intended to be a figure moving towards the right, which is kind of interesting. Could I ask what other cases you've worked on?

Informant: Other businesses?

Jamie: Yeah.

Informant: General Electric, Skype, the New Museum, Littlewoods, err … what else … project Red, American Express,

I mean I've worked on tons and tons of brands; I've been
working in branding for ten years now – I've worked on a
lot.

Jamie: My reason for asking is that I was thinking about
whether there were any other cases that were similar to
Smith & Nephew. I'm particularly interested in how consul-
tants and designers determine what an organisation should
express through their brand marks. Are there any frame-
works that you use to aid that process?

Informant: Obviously, I think you know, I've worked for
Wolff Olins for a good part of my professional career; and
the thing that I love about what we do is, I think, that
everything that we express for a business comes from two
things: what's special about that business; and what the
world needs. And that sweet spot … kind of … where those
two areas overlap, I think is the most successful place
for a brand to begin to understand what they stand for
in the world. I'm not a huge believer, or fan, of brand-
ing for branding sake. I really think that these kinds
of things come from what others want to do in the world
and everything stems from there. So very much strategy
and design together; of course I love design as a formal
thing and I think it's beautiful but I think … this is my
opinion, not necessarily the opinion of everyone … I just
think that the world is in a position right now where we
don't need more stuff, we need better thinking that can
actually change the world for the better. [Nervous laugh.]

Jamie: Mmm.

Jamie: In your experience how are core values used in the design of brand marks?

Informant: I think it's really important for giving peo-ple a framework and criteria for understanding what they will do and what they won't do – whether that's the ac-tions that they do in the world or whether that's the things they make in the world. Some people could say that they are just words, they don't mean anything but I actu-ally think when you're an organisation to have those kind of frameworks for your partners, for your employees, for everyone, having the values is really important. I think that's the importance of core values for me.

Informant: It's just about filtering: I think it's just as important as to what you don't do as what you do do.

Jamie: That's interesting way of looking at it. The filter-ing metaphor is interesting …

Jamie: We hear of companies rebranding to articulate their vision. What's your view on that?

Informant: Again, I think it's articulating why are you in

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world … why do you wake up every morning to go to work, why … something that you can – with hand on heart – kind of say and believe in and is true to you as an organisation. Again, not only can your employees understand but your customers can understand as well. I think having your vision, and you know there are lots of words for vision; it could be mission it, could vision, it could be … I think it's different than value proposition, now; I think that's a different kind of thing. Value proposition for me is more about the value you create for your customers, as opposed to the vision about your impact in the world.

Jamie: Right. Are you saying that value propositions relate more to product brands or organisational brands or both?

Informant: I don't think that it's about branding at all. In fact I think a value proposition is about your value that you create in the world; like the actual tangible value. I don't think it's about the brand at all. I think it's about 'what does your product – or service – do for people'; what's the value it creates for people. So like, in the instance of Smith & Nephew, it essentially transforms people's lives. It makes their life better. That's the value it creates.

Jamie: Are saying it is an expression of purpose?

Informant: Yes, yes, I think it's the benefit – the benefit for the customer. Yes, actually it's not purpose, it's benefit; purpose is more about vision, proposition is more about benefit.

Jamie: Well, thanks for taking the time to speak to me, 'Informant x'.

Informant: That's okay. I hope it was useful.

Jamie: It's been really useful, thanks.

Informant: Good! Well good luck with it. And have a nice day.

Jamie: You too. Take care. Bye.

Informant: Thanks. Bye.