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Branding to Compete: Applications to Textiles and Apparel

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ABSTRACT

Purpose: The objective of this paper is to briefly review competitive strategies that are relevant to the U.S. textile and apparel industry, focusing specifically on differentiation and branding methods. The various approaches and strategies are then applied through specific examples and illustrations.

Methodology: A comprehensive review of secondary data sources, both research and trade combined with primary data sources (via industry interviews) are reviewed. Results are presented as the differentiation typology proposed by Barney (2002).

Findings: Numerous competitive strategies can aid textile and apparel firms in preserving and/or improving their current market position. A specific strategy used, branding, aids in the differentiation of product throughout both the textile and apparel industry.

Practical Implications: The compilation of literature on differentiation and branding will be useful in further research and studies that focus on textiles and apparel or those that are concerned with product differentiation. Direct applications to both textile and apparel firms are made and a potential structures by which they may develop brands is introduced.

Value of Paper: The paper will aid both academia and industry in the development of textile and apparel brands through the introduction of literature on the topic, as well as recommendations on brand strategy and creation.

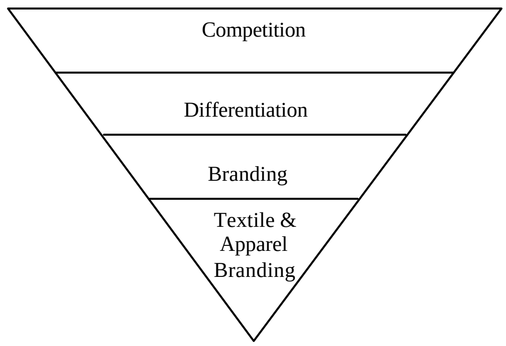
Keywords: Competitive strategies, Differentiation, Branding, Private label, Textile and apparel industry

1. INTRODUCTION

The textile and apparel industry, due to its low barriers of entry, is one of the most highly competitive manufacturing sectors in the world [1]. As obstacles to trade among nations have declined due to improved transportation systems, technology transfer and government cooperation, the industry has seen a rapid increase in globalization and competition. A common marketing trend seen throughout the 1970s was price competition as a means by which firms would compete for sales. Such measures, however, were found to lower margins, create a lack of customer loyalty, product imitation and inadequate profitability.

As a result of this trend, competitive strategies have been an imperative subject of study throughout academia and industry for the past thirty years [2; 3; 4; 5; 6; 7; 8; 9]. A specific area of concentration has been on branding as a means of textile and apparel differentiation. This strategy has become increasingly popular with manufacturers and retailers in an attempt to achieve the sustainable consumer appeal and profitability for which they strive. The paper will begin with a broad examination of competition and then gradually narrow into specific strategies and their application to the textile and apparel industry (see Figure 1).

Figure 1: Branding as a Differentiation Strategy in the Textile & Apparel Industry



Source: Author (Bruer, S. , 2004).

The research objectives of this paper include:

1. Identify key competitive issues in the textile and apparel industry
2. Discuss brand as a strategy, including brand models
3. Direct application of these strategies to the textile and apparel industry

1.1 Competitive Forces

Currently there are four major areas in which the textile and apparel industry is facing significant struggle: trade, economic policy, product development and retailing [10; 11; 1]. The textile and apparel industry, until recently, was a well-protected sector with high barriers for imported products due to U.S. quota and tariff systems. With the World Trade Organization's elimination of quota in 2005, one means by which the domestic industry has combated inexpensive, competitive products will also be eradicated and the door to foreign products and U.S. market penetration opened.

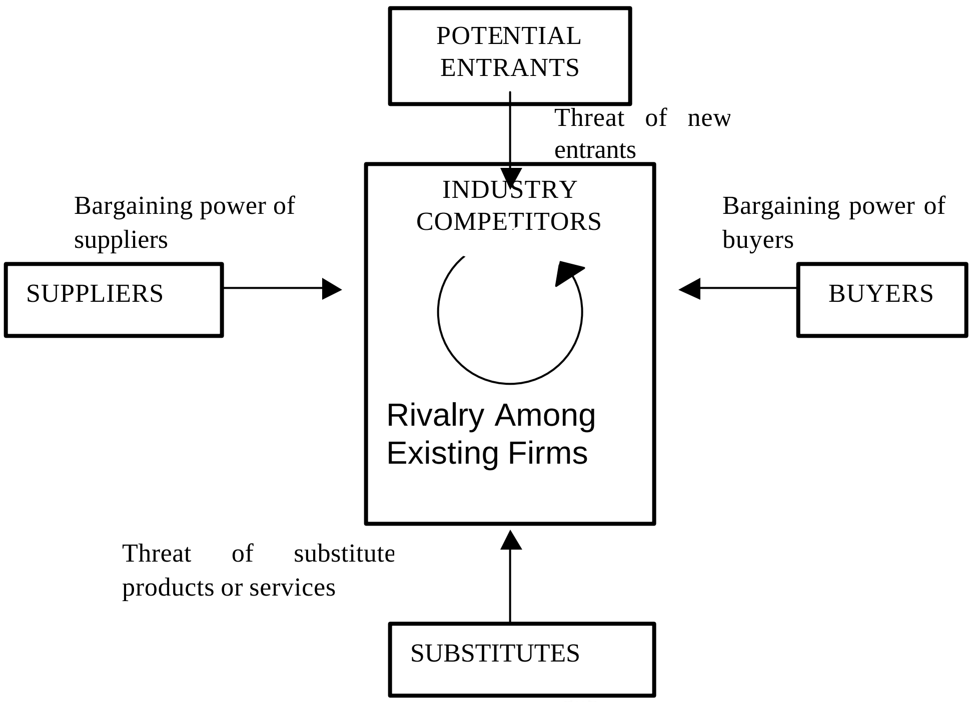
Economic policy, or lack thereof, has greatly affected the ability of industry to compete. With a strong U.S. dollar and competing countries floating exchange rates, it is difficult for U.S. products to be competitively priced in either domestic or foreign markets [12; 13]. Because the domestic industry is unable to compete on price (greatly attributed to high labor costs), firms are trying to find a competitive advantage by specializing in the production of goods that are capital and technology intensive such as home furnishings and industrial textiles [14]. As developing countries are also investing in machinery and plants, this strategy faces greater competition and less long-term advantage [15].

The final issue that the industry confronts is the growth of power by the retailer, due to the development at the mass retail channel, as well as the consolidation of many key players. The largest retailer in the world, Wal*Mart, requires their suppliers to deliver goods with little margin for the producer [16]. Control over the supplier is also evident within the department store channel as consolidation has escalated and buyers exert greater control over suppliers [17].

2. SETTING THE STAGE: INCREASED INDUSTRY COMPETITION

Porter's Five-Forces Model, introduced in his 1990 text "The Competitive Advantage of Nations," will be used to introduce the idea of competition. Application of the five forces to the textile and apparel industry have also been prevalent in the research [11; 18].

Figure 2: Forces Driving Industry Competition



Source: Porter, M. (1990). Competitive Advantage of Nations. (p. 35). New York: The Free Press.

2.1 Potential New Entrants

Porter [19] indicates that potential new entrants pose a threat due to the increased level of capacity they afford. Such additional supply could drive prices down and cut into the profits of current producers. The chance of newcomers entering the market depends upon two variables – the barriers to entry and the probability and severity of retaliation from the established producers. The barriers include economies of scales, product differentiation, capital requirements, switching costs, the accessibility of distribution channels, advantages held by competing firms including learning curves, location and patents, and finally, government policy can play a role in market entry and the ability to compete [19].

2.2 Rivalry Among Existing Competitors

The *intensity of rivalry among existing competitors* depends upon the level of saturation within the industry. If in order for one firm to gain market share they must take it from a competitor, the level of rivalry that exists is high, often resulting in retaliation and price wars. Rivalry may stem from a variety of sources 1) numerous and equally balanced competitors; 2) slow industry growth; 3) high fixed or storage costs; 4) economies of scale and overproduction; and

5) high exit barriers such as economic, strategic, and emotional factors [19].

2.3 Competition from Substitute Products

The *threat of competition from substitute products* occurs if multiple products are found to perform the same function [19]. Such substitutability relinquishes much of the control from the firm to the consumer. No longer is the consumer at the mercy of the producer for quality, price or availability; instead producers have to worry about savvy consumers that consider the value trade-offs associated with their purchase and must offer a superior product to avoid the loss of market share.

2.4 Bargaining Power of the Buyer

Bargaining power of buyers occurs when leverage is given to the buyer and demand for lower prices, increased quality and more services are made [19]. The amount of power enjoyed by a buyer group may be determined by the concentration of buyers or volume of purchases. Additional occasion for high levels of buyer power may occur when the purchase represents a large portion of the buyer's overall expenditures, if differentiation and switching costs are low, if there is likelihood of backward integration and if the buyer is fully informed about demand, market prices and supplier costs.

2.5 The Bargaining Power of the Supplier

Bargaining power of suppliers is a concept that mirrors that of the bargaining power of buyers, except the control is now shifted to the provider as opposed to the consumer [19]. The level of concentration within both the buying and selling industries affect the bargaining power of the supplier. Probable instigators of supplier power can occur in the event of highly concentrated suppliers and fragmented buyers; few or no substitutes; the level of importance of the customer group or industry to the supplier; the significance a supplier's product plays as an input into a buyer's end product; the level of differentiation or switching costs; and the likelihood of forward integration.

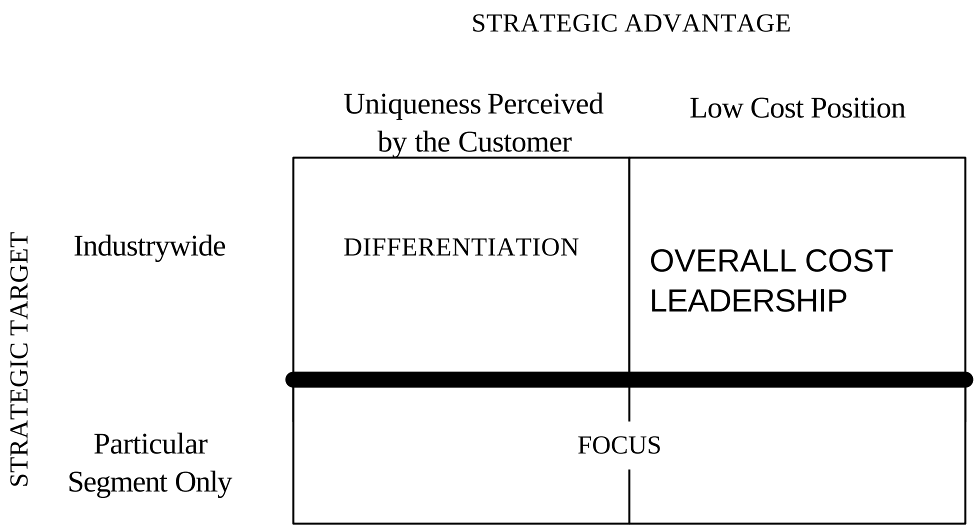
2.6 Competitive Strategies

Before delving into a discussion on strategy it is first important to define competitive advantage:

> "A firm experiences *competitive advantage* when its actions in an industry or market create economic value and when few competing firms are engaging in similar actions. Firms gain competitive advantages when their theory of how to compete in an industry or market is consistent with the underlying economic processes in that industry or market and when few other firms share this theory or are unable to act upon it as completely" (Barney, 2002, p. 9).

The theory of how to gain such a competitive advantage, or compete successfully, is considered a firm's *strategy*. Competitive strategies are of such importance that Porter wrote an entire book on how they may be created and applied to specific industries paper [20]. Although strategies were not expressly applied to the textile and apparel industry, the following generic matrix will be utilized for this.

Figure 3: Three Generic Strategies



Source: Porter, M. (1998) *Competitive Strategy*. (p. 39). New York: The Free Press

The first strategy identified by Porter, *overall cost leadership*, was mentioned in the introduction of this paper as a means of combating the saturated textile and apparel markets of the 1970s. Cost leadership requires the firm to implement or attain a variety of competencies including efficient-scale facilities, vigorous pursuit of cost reductions from experience, tight cost and overhead control, avoidance of marginal customer accounts, and cost minimization in areas like research and development, service, sales force and advertising [20]. The goal of such policy is to reside at the forefront of low-cost production or retailing, and still achieve above-average returns. It is possible to understand how a firm can attain such a competitive position within the industry by analyzing the effects of cost-leadership on the five forces. The bargaining power of buyers was seen as a threat to firms because of buyer's ability to drive down prices to the point of the next competitive supplier.

In the case of cost leadership, this is not as great a threat because the cost-leader is able to produce at a lower cost than this competitor and therefore maintain higher margins. Cost leadership also offers protection against the bargaining power of suppliers. Because the firm controls its costs from every aspect of the operation, an increase in a single input does not weigh as heavily on the overall cost or performance of the organization. Being the low cost leader is not an easy feat, it requires great internal planning, coordination and relationships with suppliers and buyers. Such relationships are not easily imitated and therefore can create a high barrier to entry for new firms wanting to penetrate the market. Last, the firm has a strong position in the market compared to substitutes due to the lower costs passed on to consumers that other firms with similar products might have difficulty replicating [21].

Differentiation is the next of Porter's generic strategies to which the five forces are applied. Differentiation may occur in one of seven forms:

1.	Product features
2.	Linkages between functions
3.	Timing
4.	Location
5.	Product mix
6.	Links with other firms
7.	Reputation

Figure 4: Ways Firms Can Differentiate Their Products

Source: Barney, J.B. (2002). *Gaining and Sustaining Competitive Advantage*. (p. 266). Saddle River: Prentice Hall.

The ultimate goal of differentiation is to create a product or service that is perceived by the consumer and/or industry as unique and having superior attributes or value. A successful differentiation strategy allows for products to command brand loyalty and a corresponding reduction in price sensitivity – both helping to overcome the pressures of competitive rivalry. Unique attributes and brand loyalty also create barriers to entry for firms wanting to compete with like or substitute products. As mentioned, consumers are not as sensitive to price when loyal to a differentiated product, it is therefore possible avoid the need for a low-cost position [22]. Both supplier and buyer power may also be overcome through the willingness of buyers to pay a premium for differentiated products. Suppliers may raise their prices and consumers will absorb the costs, never damaging the margin of the supplier. It has already been established that buyers' control is sacrificed because of their attraction to the unique attributes or perceptions associated with the differentiated product and are consequently willing to pay a premium.

The final of the three generic strategies is *focus*. This strategy may apply cost leadership, differentiation or both to a very specific market or segment of the market. The goal of focus is to serve a group or market more effectively or efficiently than those firms that try to serve a broad population. For all practical purposes, one can look at the characteristics and applications of each of the strategies listed above to understand how the firm applying focus might arrive at a competitive advantage.

Competitive strategies may be used individually or simultaneously, however, it is suggested by both Porter [20] and Barney [21] that to achieve excellence in either, a firm must concentrate on a single strategy and apply it to all endeavors. (Note: Appendix 1 includes a table of organizational requirements needed to develop each of the three strategies, as well as some of the opportunities and threats associated with their implementation). In the subsequent sections of this paper one of the generic strategies - differentiation - will be further developed and applied to the textile and apparel industries and then narrowed further to focus on a single approach.

3 DIFFERENTIATION

Although individual industries and firms may find one competitive strategy more likely to benefit their particular situation than another, it will be the focus of this paper to consider the single strategy of differentiation. Differentiation is a firm's attempt to create a product or service that is perceived by the consumer and/or industry as unique and having superior attributes or value [23; 24; 25]. It is important to note that the existence of product or service differentiation lies in the mind of the consumer [23]. In fact, two products may be identical, but are presented in such a way to the consumer that they believe one superior to the other. In order to create such distinctions, a firm may use one or all of the seven distinctions. The seven bases of product differentiation will now be discussed using Barney's [21] teachings as a guide for explanation.

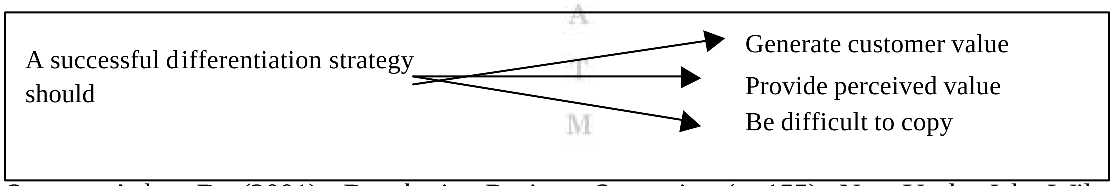
Figure 5: Differentiation Tools

Differentiation Tool	Application
Product Features	Alter properties of product or service sold
Linkages Between Functions	Relations between firm divisions
Timing	Being the “first mover” or perfect timing in entering/exiting the market
Location	Consumer accessibility or association through firm or distribution location
Mix of Products/Service	Consistent and well-matched offering of related products
Linkages Between Firms	Partnerships or associations
Reputation	Well known for quality, service and excellence

Sources: Author (Bruer, S., 2004).
Barney, J.B. (2002). *Gaining and Sustaining Competitive Advantage.* Saddle River: Prentice Hall.

Regardless of the means by which a firm differentiates their product, Aaker [26], suggests that for it to be successful three characteristics must exist:

Figure 6: Successful Differentiation

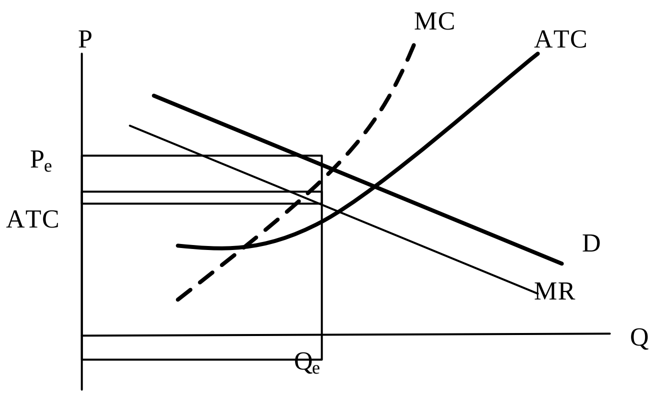


Source: Aaker, D. (2001). *Developing Business Strategies.* (p. 155). New York: John Wiley & Sons.

3.1 Economic Value of Differentiation

Although management and marketing are the disciplines that govern competitive strategies, it is important to consider the economic ramifications associated with differentiation. In the study of commodity markets in which products with no distinct attributes fall, firms are assumed to operate under perfect competition. In addition to identical products, the assumption that defines perfect competition is numerous firms in an industry, each of which controlling only a small portion of the market. Because the firms have no control over prices, they face a horizontal demand curve and produce and sell at the point where marginal cost is equal to marginal revenue, thus maximizing economic performance. In a perfectly competitive market the maximum return that a firm can achieve is normal economic profit. It is the premise of both Porter [20] and Barney [21], that by differentiating a firm's product above normal returns may be achieved.

Figure 7: Product Differentiation and Firm Performance: The Analysis of Monopolistic Competition



Source: Barney, J.B. (2002). *Gaining and Sustaining Competitive Advantage*. (p. 278). Saddle River: Prentice Hall.

Figure 7 shows how a firm might successfully achieve above normal profits. In selling a differentiated product, it is as if the firm holds a monopoly and therefore operates under monopolistic competition. This differs from perfect competition because the firm is no longer at the mercy of the market price; instead it may be adjusted in such a way that consumer's pay a premium for the unique product being offered. This change is represented by the downward sloping demand curve that demonstrates the decision a firm must make to produce a relatively small quantity and command high prices or produce larger quantities and market them at lower prices. Firms still choose to maximize their profits by producing and selling at the point where marginal cost is equal to marginal revenue. The price that is charged at this point corresponds with the level of demand in the market – high demand means the firm may charge higher prices, conversely, low levels of demand result in decreased prices. The key difference in this model, however, is that if the firm's average total cost is below the price it can charge, then the firm selling the differentiated product can earn an above-normal economic profit.

The diagram given in figure 7 shows four important lines MR (Marginal Revenue), ATC (Average Total Cost), D (Demand) and MC (Marginal Cost). The intersection of MR and MC is used to determine the quantity that should be produced (Qe) and prices charged (Pe) to maximize profits. Because the demand for the good is high enough that the price charged exceeds the ATC, the firm achieves above normal profits. The actual amount can be determined by multiplying the price x quantity of the darkly shaded region above. Normal profits could be calculated by the same method, but with the figures represented in the lightly shaded region.

3.2 Differentiation Strategies

Exploration of differentiation strategies has led to the development of ways in which a product or firm might create a unique offering that commands a price premium. The next concern that must be addressed for firms that choose to implement this strategy is how to maintain or *sustain* this competitive advantage and avoid imitation by others, thus bidding away the above average profits that drove the firm to invest in uniqueness.

The rarity and costliness to imitate a product differentiation strategy are what ultimately determine the long-run sustainability of the market position [27]. Of the seven potential different strategies given, each offers a varying level of defense against product imitation – whether through direct duplication or substitutes. Often product duplication is a simple accomplishment for rival firms as new products are made public and the unique features can be identified and reproduced or improved. The threat of duplication is difficult, if not impossible, to overcome if firms are focusing their differentiation on product features, product mix, links with other firms, product customization, complexity, or consumer marketing. Duplication of all of these efforts do not come with the same ease, rather it is often costly and difficult to accomplish.

One strategy that is more costly to duplicate is the linkages across functions in a firm because it is often difficult to duplicate the corporate culture or environment that successfully internalizes such communication and teamwork. Timing is also difficult to duplicate for such an advantage is often arrived at by luck or a history of predictors that are individual to that firm. Location, like timing is unique in that a similar strategy might be implemented, but can never be precisely duplicated. Last, and potentially of the greatest importance, is firm or product reputation. According to Barney [21], "a firm's reputation is actually a socially complex relationship between a firm and its customers, based on years of experience, commitment, and trust" (p.270). This is perhaps the only strategy that cannot be earned quickly or readily bought and sold.

Armstrong and Kotler's [28] approach to differentiation takes on more of a marketing strategy and is divided into four major areas of differentiation:

Figure 8: Market Differentiation Strategies

Product Differentiation	Service Differentiation	People Differentiation	Image Differentiation
Features Performance Style Design Consistency Durability Reliability Reparability	Delivery Installation Repair Customer training Consulting services	Employee hiring & training Customer contact Competence Courtesy Communication	Images Signs Symbols Logos

Sources: Author (Bruer, S., 2004).
Armstrong & Kotler (2000). *Marketing: An Introduction*. Upper Saddle River: Prentice Hall.

There is a great deal of overlap among the strategies of Armstrong [28], Barney [21], Porter [20] and Trout [29], most notably the similarities within product, service and staffing strategies. The difference that should be most strongly noted and is the focus of the next section of this paper is *image differentiation*. This strategy differs in that firms or products are perceived uniquely by consumers due to differences in images, symbols, logos or signs, also referred to by Armstrong and Kotler as *brands*. As the number of choices in the marketplace have increased, the importance of branding has become increasingly obvious (Note: See Appendix

2). With the proliferation of products under a single category, it is obvious that differentiation purely on product attributes or other replicable offerings make it difficult to evade rivalry and direct price comparison, but by creating a unique position in the mind of customers through the use of brands it is possible to achieve and sustain a firm's differentiated advantage. According to Hitt, Ireland and Hoskisson [30], brands are of increasing worth because they are intangible assets that are difficult for competitors to understand and imitate. The subsequent sections will discuss brand marketing, different types of brands and the significance of each application.

4 BRANDING

4.1 Branding Defined

A brand, as defined by Keller [31], is "a product, but one that adds other dimensions that differentiate it in some way from other products designed to satisfy the same need. These differences may be rational and tangible – related to product performance of the brand – or more symbolic, emotional, and intangible – related to what the brand represents" (p.3). Mariotti [32](1999) defines a brand as "a simplified 'shorthand' description of a package of value upon which consumers and prospective purchasers can rely to be consistently the same (or better) over long periods of time. It distinguishes a product or service from competitive offerings" (p.13). The definitions offered throughout the various articles and books on branding are quite different and abundant, but the commonality among them all is that they provide manufacturers and retailers a means by which they can enter the mind of the consumer as with some sort of differentiated value.

Nearly as numerous as brand definitions are the categories by which a brand might be organized. Listed below is a compilation of brand groupings followed by an explanation of each category.

Brand Classifications	Brand Market Positions	Brand Type	Other
Corporate brands	Primary brand	Product brand	Channel brand
House brands	Secondary brand	Service brand	Own-label
Range brands	Tertiary brand	Personal brands	Co-branding
Product brands		Organizational brand	
		Event brand	
		Geographical brand	

Figure 9: Brand Terminology

Sources: Author (Bruer, S., 2004)
Nilson, H.N. (1998). *Competitive Branding: Winning in the Marketplace With Value-Added Brands.* New York: John Wiley & Sons.

According to Nilson [33], brands can be classified into several different **categories**: corporate brands, house brands, range brands and product brands. A *corporate brand* is "a brand symbol covering all activities of a corporation. It clearly and distinctly identifies the one who is responsible for the product or service"(p.29). The purpose of a corporate brand is to answer the questions in a consumer's mind about who makes the product. It gives them further reassurance about the quality of the product, as well as the trustworthiness of the company [34].

Perhaps the most traditional way of branding is the *house brand* [28; 33]. This method uses a name across a wide variety of products. The next level of branding mentioned is the *range brand* that has the purpose of unifying a large range of products. It is often used for a considerable number of products that have common and distinct values that are of a similar nature [35]. The *product brand* strategy is that of a single product and a single brand. This method carries perhaps the most advantages and disadvantages, resulting in the majority of products beginning in such a way [36]. The strategy is valuable if a firm can focus all of its attention on an individual product, however, it is an economic hindrance because of the smaller scale to which one is confined [37].

The next way in which Nilson [33] categorizes brands is according to their **market position**, or how they are situated with respect to the competition. This is broken down into three general categories: primary brands, secondary brands and tertiary brands. The *primary brand* is often referred to as the "market leader" (p. 27). It is typically the first product to pop into the consumers mind when considering a product category. The *secondary brand* is similar to its name – it is second, third or fourth in the mind of consumers. Its basic means of survival is its distribution method. It is not necessarily the brand a consumer would choose within a product category, but it is what is available and therefore gets the sale. Finally, *tertiary brands* are those that are produced purely on price competitiveness and hold that spot in the consumer's mind. The products that fall under this category sell under a heavy discount (on average 25-30%), have average quality and little brand association. They differ from secondary brands because it is not the goal of manufacturers and retailers to compete with primary brands, but to aspire to customers that are more price conscious.

Yet another way in which Nilson classifies brands is called the *channel brand*. Running a brand policy through the use of channel brands allows a manufacturer to create different products and brand names for various channels [38].

Finally, Nilson talks about own labels and co-branding. Own labels or private labels are just two names given to a product line which is owned, controlled, merchandised and sold by a specific retailer in its own stores [39]. Co-branding will be the final of Nilson's propositions to be considered. *Co-branding* can occur in two different ways. The first of which takes place when two brands jointly endorse a single product, the second method occurs when one brand endorses the contents of a main brand.

Coomber [40], author of "Branding" suggests that there are six different **types of brands**: product brands, personal brands, organizational brands, event brands and geographical brands. A *product brand*, the definition of which differs from that of Nilson, is a commonly packaged good with a well-known name. A *service brand* refers to that of an intangible services, as opposed to the material things to which the brand might refer. *Personal brands* encompass a range of personalities, typically well-known. Such celebrity fame is then used by firms to associate the name or the individual with the product in an effort to transfer notoriety. Additional personal brands might emerge from the corporation or brand's founder (see Appendix 3 for a list of examples).

An *organizational brand* is one that "becomes an integral part to the strategic planning process." The organizational brand can include charities, political parties and corporate brands. The brand is no longer just a product or service, but becomes the entire organization, or on the other hand, the organization may become synonymous with product. *Event brands* are described as those that have taken on lives of their own and are promoted as stand-alone brands. Events that typically become their own brands are concerts, tournaments and races Finally, *geographical brands* are often used in or for major tourist attractions by the leisure industry. Further brand categories are presented in a model in Appendix 4.

4.2 Brand Identity

According to Randall [41], there are many different dimensions of a brand and in order to better understand the various aspects, it is first necessary to differentiate brand image and brand identity (to avoid any confusion in the remainder of the paper, a glossary of branding terms are given in Appendix 5).

"*Brand image* is what exists in the minds of consumers. It is the total of all the information they have received about the brand – from experience, word of mouth, advertising, packaging, service and so on – modified by selective perception, previous beliefs, social norms and forgetting." (p. 7)

"*Brand identity* is what we [marketers] transmit to the market place – it is what is under our control, provided that we understand the essence and expression of our brand." (p. 7)

According to Figure "Branding Essence," various dimensions of a brand – functions, personality/image, differences and sources - determine the brand's essence. The essence is what is held in the consumer's mind – the brand image. If any of the brand dimensions are incoherent, then the brand image is no longer consistent with the identity that the firm wishes the brand to present and the dimensions of the model must be scrutinized and "tweaked."

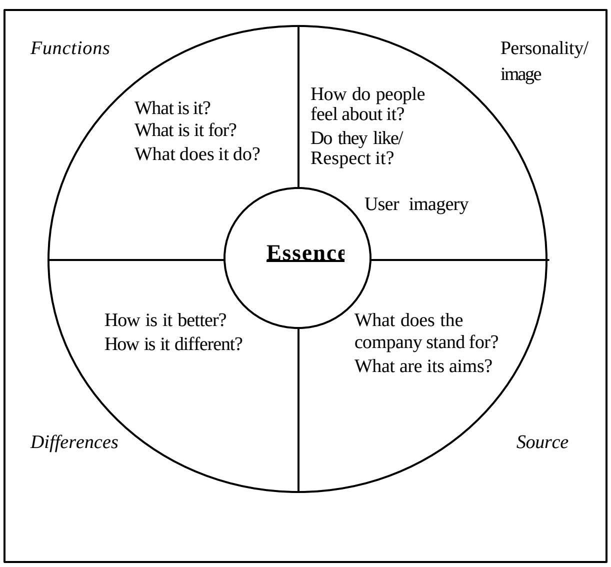


Figure 10: Branding Essence

Source: Randall, G. (1997). *Branding: A Practical Guide to Planning Your Strategy*. London: Kogen Page Limited.

The idea that brand essence is what is held in the consumer's mind is contradicted by Aaker and Joachimsthaler [42] who suggest that it is instead the brand's vision or "a single thought that captures the soul of the brand." It is proposed that the vision is created with the consumer in mind. A model of brand identity and how brand essence fits into the strategic planning of a firm can be found in Appendix 6.

4.3 The Lifecycle of Brands and Products

Brands, unlike individual products, are considered to have infinite life (42; 43; 44]. This thought is defended by the fact that products often have finite life or are only protected by patents for a limited period of time, whereas trademarks if registered and maintained properly can go on indefinitely. The lifecycle and its relationship to branding, however, is extremely important to marketers and manufacturers as it can help in extensions and revitalization [45].

Three different types of expansion can be made through the use of brands: line extensions, brand extensions and image transfer [43]. *Line extensions* typically occur through the product category in which it already resides through the use of functional, expressive and central values that are similar to those of the original product (examples would fall under range brands). *Brand extensions* result from the broadening or lengthening of current product offerings into products that may not be similar, but require similar values by the consumer. Finally, *image transfer* is a case where the brand is not necessarily defined by its functional values, but by expressive and central values, and is therefore able to go beyond category limitations and can bridge a range of product types. A new product can be launched into the market more cheaply as marketing dollars are spread over a larger number of products. This can help a firm with products or brands that are "dying off" or losing equity in the eyes of consumers [43]. Unfortunately such use of the already existing brands needs to be well thought out and used sparingly as the brand might become diluted, consumers potentially become confused and your new products might cannibalize the current offerings [32].

4.4 Significance of Branding

As indicated by Murphy [46], brands are valuable to firms at two different levels: 1) as a credible guarantee to consumers of value and satisfaction that evoke sales and future cash flow through loyalty; and 2) as a strategic position by manufacturers to communicate with consumers and gain control over distributors and retailers. Keller [31] separates the importance of brands into how they benefit the consumer and the manufacturers:

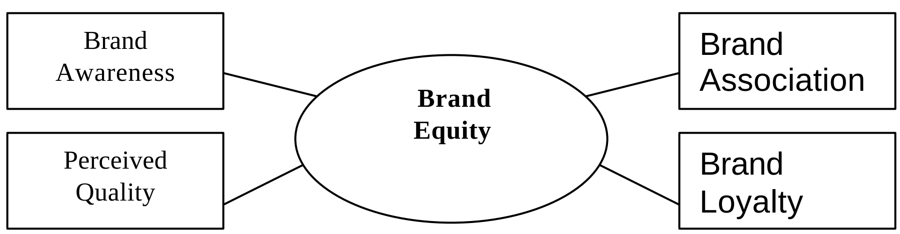
Figure 11: Roles That Brands Play

Consumers	Manufacturers
Identification of source of product	Means of identification to simplify handling or tracing
Assignment of responsibility to product maker	Means of legally protecting unique features
Risk reducer	Signal of quality level to satisfied customers
Search cost reducer	Means of endowing products with unique associations
Promise, bond, or pact with maker of product	Source of competitive advantage
Symbolic device	Source of financial returns
Signal of quality	

Source: Keller, K.L. (2003). *Strategic Brand Management*. New Jersey: Prentice Hall.

D'Alessandro [47], establishes three more reasons for which a company would have an advantage in the marketplace by creating a strong brand. The first is that the very best people want to work for the best brands. The next is that brands help the employees focus and make decisions more easily because the identity the firm is driven to create for customers requires specific strategies to be implemented and actions to be taken. Finally, he suggests that as employees derive a sense of belonging, direction and purpose through the brands, and do more than they otherwise would have believed they could to make the brand and firm a success. In addition to those intangible factors, Appendix 6 lists a variety of benefits. Taking a different look at the implications of successful brands, Aaker and Joachimsthaler [42] consider the financial outcomes to a firm. They suggest that firms are no longer victims of vicious price competition because their products are not seen as commodities. Additionally, they offer brand equity to the firm that allows for the brand to be seen as an asset or liability through its name or symbol that may add to or take away from the product or service being offered (see Figure 9). The exact calculations to determine a brand's worth are complicated and not always precise, but they do reflect a fairly accurate representation of the brand's worth to a firm. Appendix 7 gives a list of some of the best-known worldwide brands as a percentage of the firm's overall worth.

Figure 12: Brand Equity



Source: Aaker, D.A. (1998). *Strategic Market Management*. New York: John Wiley & Sons.

4.5 What makes a strong brand

For a brand to be a success, Stuart [48] identifies four pillars of a strong brand:

1. Differentiation: what is its distinctiveness and uniqueness?
2. Relevance: is it personally relevant in price, package, form etc.?
3. Esteem: does it measure up to expectations: is it special?
4. Knowledge: do consumers know and understand the brand?

Source: Stuart J. (1997)"How Great Brands Got to Be That Way." *Advertising Research Council*

The four pillars are ways in which a brand must be created and perceived in order to be thrive. Mariotti [32], takes a different approach to a brand becoming successful through his "Three Ages of Brands" (Figure 13).

Figure 13: Three Ages of Brands

Brand Age	Description	Objective
First Age	To differentiation/ show ownership	Capture as large a share of consumer's wallets as possible
Second Age	Value, status & identity emerge	Capture as large a share of consumer's minds as possible
Third Age	Become ideologies	Capture the largest possible share of consumer's lives, and even their souls

Sources: Author (Bruer, S., 2004).
Mariotti, J. (1999). *Smart Things to Know About Brands & Branding.* New Hampshire: Capstone US.

4.6 Differentiating Products Through National Labels and Private Brands

Two major categories of branded apparel exist in the store today – national brands and private labels [49]. Note: The remaining product is considered unbranded or generic). One of the key issues in the global retail world is the current trend from national brands toward private label goods and the question of who will have control - the suppliers or the retailers. The Private Label Manufacturers Association – PLMA [50] conducted a study showing a 25% increase in store brand sales over the last five years with continued growth projected. Specifically, there was a rise from 36 billion dollars in 1996 to over 50 billion dollars in 2000. In the recent past, national brands have been the consumer's choice of product, but lately, whether it is from consumer demand or retailer push, the share of private label on the retailer's racks and in the consumer's closets has been rapidly rising. In a poll by Brand Keys, a market-research firm, almost 61% of consumers said high-end apparel logos and labels are less important to them now than in years past [51].

The name "private label" is just one of many given to a product line which is owned, controlled, merchandised and sold by a specific retailer in its own stores [39; 52; 53]. Others include store brand, proprietary brand, own label or dealer owned label.

The question mentioned earlier by many suppliers and retailers is about the rise of private-labels and whether this trend will continue. According to [32], the store brand phenomenon seems to follow the economic trends of the market in that as the economy begins to soften, the amount of private-label goods sold will increase. Affirming this belief is the appeal of store brands to consumers due to their lower costs. Such lower costs cause a high correlation between the private label purchases and personal disposable income – as an individual's disposable income rises, the less likely they are to buy private labels and the more likely they are to purchase national brand products [31; 53;54; 55; 56].

When creating a private label program, retailers use two different methods – 1) buy or license existing brands, thereby piggybacking off an existing name recognition and advertising campaigns or 2) develop their own brands from the start [31]. Examples of these two methods are plentiful and will now be discussed in some detail.

4.7 Brand Models

Though a variety of brand models are seen throughout the literature, six will be considered in this analysis. The first "Brand Identity Planning Model," pictured in Appendix 4, was presented by Aaker and Joachimsthaler [42]. It presents a structure by which a firm may analyze the three components that shape the competitive environment – customer, competitor and self. From there, the way in which the brand will appeal to the consumer and compete with other brands may be selected from twelve potential categories/identities and then developed through value proposition and further brand building. The final stages include extension and maintenance of the current brand program. A study by Schultz and Hatch [54] relied heaviliy upon the models used in the Aaker and Joachimsthaler [42] text when focusing on brand identity, value proposition, and brand positioning.

Keller's brand model [31] " Building Consumer-Based Brand Equity" is shown in Appendix 6 (2002). Keller's model breaks down the equity-building process into three major categories: 1) brand-building tools and objectives, 2) consumer knowledge effects, and 3) branding benefits. Each category is contingent upon the other. The first category requires the organization to choose the elements by which they will create their brand (i.e. logo, symbol, etc.). Once the element(s) is/are selected the firm must determine how to transmit their marketing tool/program to consumers. The second category considers the effect the brand will have on consumer awareness and association – can the brand be easily transferred or recalled and what perception does it leave for consumers. Finally, the model gives consideration to the possible outcomes these strategies may provide. The model proposed by Keller [31] influenced the study conducted by Roberts and Morrison [58]. The elements were considered in their acknowledgement of co-branding. They further used this idea to evaluate consumer's assessment of co-branded products and whether strategic alliances capture the best parts of brand associations and avoids the negative aspects.

The third model introduced the "4-D Model of Branding" is by Gad [59] (see Appendix 8). This model has four different dimensions that contribute to branding:

Function: concerns the perception of benefits of the product or service associated with the brand
Social: concerns the ability to create identification with a group
Spiritual: the perception of global or local responsibility
Mental: the ability to support the individual mentally

These dimensions are needed to evaluate the brand's potential strengths and weaknesses, but does not only apply to those brands in this specific period of time, rather it can look at future brands as well as those that are already established, but are being evaluated at a strategic level. It is presumed that for a brand to be successful, it must appeal to consumers on all four dimensions. Gad's model was used to legitimize the need for personalization through branding when developing a corporate website in a study conducted by Heldal, Sjovold, & Heldal [60].

Kapferer [61] presents the "Pyramidal Model of a Brand" (see Appendix 9). This model considers a brand as it progresses through time – at the top of the pyramid is the brand's identity or core value which is sustained over the long-run. The middle portion is the way that the identity is communicated to the consumer through the use of labels and symbols. The lower tier is seen as the direct communication method with the consumer – it is the way in which the brand is first communicated to the public through the use of advertising strategies. Through this model, it is hoped that a brand will evolve from within a firm from the top to the bottom, but with the consumer from the bottom to the top to communicate the value proposition developed by the firm in the top of the pyramid. The model was used as a framework for a study developed by

Gladden, Milne and Sutton [62] considering the antecedents, brand equity and consequences associated with various components of Division I college athletics and branding.

The fifth model that will be considered is submitted by Knapp [63] through the "Brandstrategy™ Doctrine Process (see Appendix 10). The model is actually a system by which an organization may determine what fundamental principles should be used to develop a brand and how to implement or communicate them to consumers. The first stage, the Brand Assessment, is the period in which the firm investigates how already existing brands are perceived, what consumers desire from a product or brand and how to position these brands (whether new or old) to be successful. Stage two of the model is the BrandPromise which is defined as "the essence of the benefits (both functional and emotional) that current and potential customers can expect to receive from experiencing a brand's products and services." The promise contains both the viewpoint of the consumer and the heart, soul and spirit of the brand that will be communicated in the product offering. Once the promise has been finalized, the Brand Blueprint, which will be used in the actual creation of a brand is developed. The purpose of the blueprint is to determine what sort of message(s) will be sent out to consumers to convey the brand's essence, but does not establish the message itself. Step four, is Brand Culturalization. This stage is imperative to the success of the brand because it is the time where the entire firm (all employees and associates) internalize the beliefs that were determined in the first three stages. Through this new awareness, it is possible for the team members to better communicate the brand to the consumers. The fifth and final step of the doctrine, Creating Brand Advantage, considers how a firm should nurture, enhance and innovate the brand – this stage consists of the actual communication process (may include advertising), what distribution channels to use and product or line extensions.**

The final model that will be introduced, the Integrated Brand Model, is by Lepla and Parker [64] (see Appendix 11). It is the goal of this model to help a firm build the "most important asset any company has – its relationship with its customers." The model is devised to help companies better understand who they are and how to use this awareness in such a way that they can create more successful brands with greater financial results. The Integrated brand model profiles three levels of activity of all brands. The outer ring – Brand Conveyers – it is the activities that are the nearest your customer and focus on such activities as the products, day-to-day activities and communication or advertising. Many firms choose to focus all of their efforts on this exterior, but it is important to consider the other two layers. The second level, the Brand Drivers, include the principle or base for which all actions and messages are created for the brand, the personality (this was discussed in the different ways a product can be branded in section 5.1) and the associations or value offering a consumer perceives. The innermost ring, Organizational Drivers, includes the firm's mission, their values and history. The two inside layers are important in make it possible to convey a deep and meaningful brand through the brand conveyors (the outer layer). This model is thought to be important because it is possible for all members of the firm to understand and implement. **

5 APPLICATIONS TO THE TEXTILE & APPAREL INDUSTRY

5.1 Differentiation Strategies

Barney's seven differentiation strategies introduced in section two are

** Note: Extensive literature search has been conducted to identify sources that have used this model. None have been found to date.

** Note: Extensive literature search has been conducted to identify sources that have used this model. None have been found to date.

applicable to the textile and apparel industry and will be discussed using differential examples obtained through primary (industry interviews) and secondary (trade) data sources.

1. Product features – DuPont
2. Linkages between functions – Nordstrom, Wal*Mart
3. Timing – Polartec, Zara
4. Location – Talbot's
5. Product mix – Ralph Lauren
6. Links with other firms – Ford, Eddie Bauer
7. Reputation – Lands' End

5.2 Product Features

An example of how a commodity was made distinct through the use of product features is the StainMaster ™ carpet by DuPont. Prior to this introduction, all carpets were perceived to be quite similar – fabricated by like fibers and methods. The introduction of the new finish allowed DuPont to charge a premium and gain consumer recognition and loyalty [65].

5.3 Linkages Between Functions

The Seattle-based department store Nordstrom has tried to link sales, service, and buying functions to ensure customer satisfaction. By involving sales and service with the buying office, it is possible for those in purchasing to equip the stores with merchandise that is more in-line with customer wants. Knowledge of consumer satisfaction with products can come from salesperson interaction with the client, as well as explanation of discontent with products upon return [66]. Wal*mart has an excellent system that links distribution centers, suppliers and retailers in such a way to maximize just-in-time inventory management [67].

5.4 Timing

A prime example of a "first mover" within the textile industry is Malden Mills with their introduction of Polartec ™. Malden invests a significant portion of their budget into new product development in an attempt to better service the market with product features they may demand, but others have been unable to provide [68]. Another example includes the international retailer Zara and their ability to offer timely fashion [69]. Every two weeks Zara personnel update the store inventory with goods that are more stylish in color and cut.

5.5 Location

Talbot's, a women's careerwear retailer, locates stores in areas that are not necessarily near traditional shopping centers, rather they are located near the residences of suburban working women that frequent the stores. Such a focus on locating with the convenience of the consumer in mind differentiates the firm from competitors [70]. Production in locations that are attractive to consumers is another instance in which differentiation might exist. An example would be the production of much of high-end shoes and leather products in Italy. Production of identical products might be possible in locations such as China or India, but they do not have the same cache in the mind of the consumer.

5.6 Product Mix (not pricing)

A strong example of product mix is Ralph Lauren and the various uses of the brand name and extensions throughout products in the apparel arena –Ralph, Lauren, Polo, Polo Jean Co. and Polo Sport. Additionally, Ralph Lauren has branched into other areas such as home textiles – furniture, bedding and towels, as well as paints and wall paper.

5.7 Linkages Between Firms

Linkages between firms are obvious with Ford automobile company and the retailer Eddie Bauer. The name Eddie Bauer was used to differentiate Ford SUVs and trucks through minor variations of vehicle interiors and exteriors. The strategy was so successful that it has been imitated by Jeep with Columbia Sportswear and Subaru with L.L. Bean [71; 72; 73].

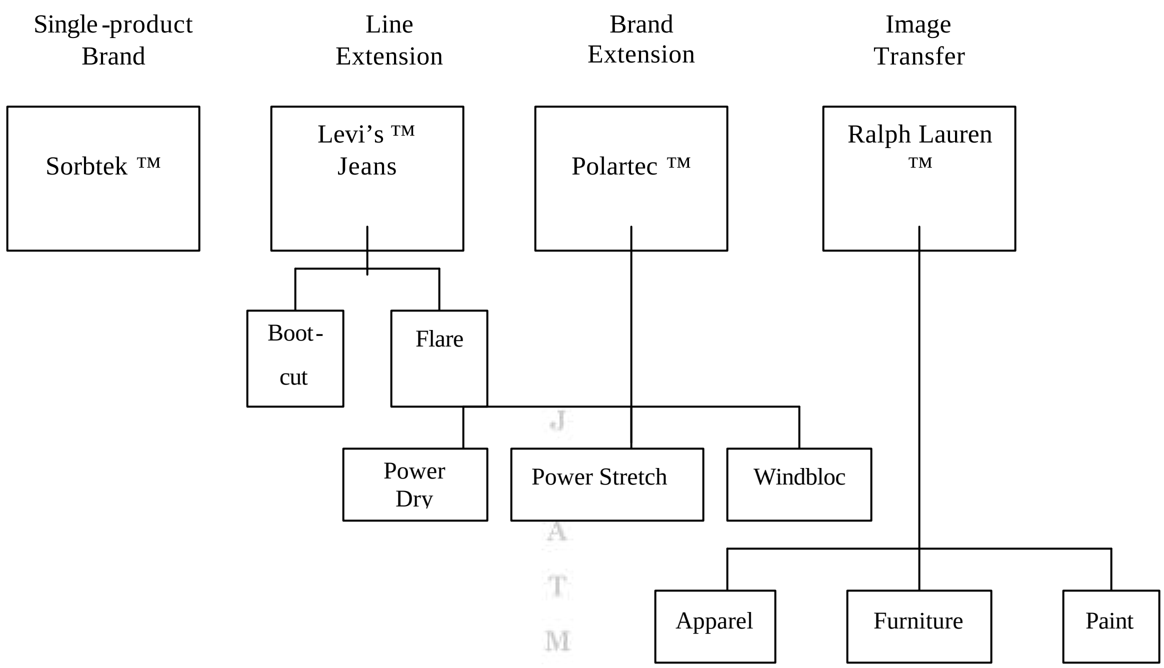
5.8 Reputation

An example of a strong retail reputation for both products and their organization is Wisconsin-based Lands' End. The company has developed a reputation that is synonymous with quality and customer satisfaction. To ensure customer confidence in this representation, they offer "Guaranteed. Period." This promise is upheld regardless of the reason for return (which does not have to be given) or the time of purchase (you can return the item even after 20 years of wear) [74].

5.9 Life-Cycle Applications to the Textile & Apparel Industry

The idea that brands can be best managed through further extensions and applications was established in section four through life cycle of life-cycle supervision. Four key types of brands can be created and then "spun-off" into other products and lines. Below are examples of textile and apparel products that have been successful in these efforts.

Figure 14: Brand Leverage Strategies Used in the Textile & Apparel Industry



Source: Author (Bruer, S., 2004)

5.10 Textile and Apparel Private Labels

Literature focused on the development of private labels is extensive [35; 43; 61;75], but its reference to textiles and apparel is quite limited. The lack of mention in research is not reflected by an absence at retail, rather private label proliferation is rampant. Store brands tend to fall in one of two categories – inexpensive or premium, and there seems to be some correlation between the type of retailer and the way in which they market their private label goods [31]. A list of apparel retailers and their store brands is given below:

Figure 15: Private Label Apparel Brands by Channel

Wal-Mart – Kathie Lee, Catalina, Basic Equipment, Bobbie Brooks, Faded Glory
Kmart – Jaclyn Smith, Kathy Ireland, Route 66 and Martha Stewart
Target – Mossimo, Xhiliration, Cherokee, Meroa, Meg Allen
JC Penney – Arizona, St. John's Bay, Hunt Club, Worthington, Stafford, Home Collection
Sears – Canyon River Blues, Lands' End, Just for Women
Macy's – INC/International Concepts, Charter Club, Jennifer Moore

Source: Author (Bruer, S., 2004)

It seems that the further one travels down the price continuum from discount retailer to mass merchant to department store, the more exclusively the private label product is priced and promoted. It is well documented that store brand product is less expensive for retailers to carry [76]. This decrease in carrying cost can either be passed on to the consumer, absorbed by the retailer or divided between the two. According to Keller, the appeal of private label to stores is an average gross margin of 25-30 percent – nearly twice that of national brands. As mentioned before, two different creation strategies may be implemented when developing private labels – development from scratch or purchasing/licensing an already existing name. The following are a series of well-known retailers and their brand strategies.

Figure 16: Private Label Brand Strategies

Retailer	**Brand Name**	**Branding Strategy**
Sears	Kenmore	Develop
Sears	Lands' End, Structure	Acquisition
Target	Mossimo	Acquisition
K-Mart	Kathy Ireland, Martha Stewart	Develop
Wal*Mart	Sam's Choice	Develop
Macy's	Charter Club	Acquisition
Macy's	I.N.C. International Concepts	Develop

Source: Author (Bruer, S., 2004)

5.11 Branding Models Applied to the Textile & Apparel Industry

Using the six models introduced in section 4.7, the following figure provides potential applications to the textile and apparel industry.

Figure 17: Branding Model Applications to Textile & Apparel Industry

Model	Application to Textile & Apparel Industry
Brand Identity Planning Model *Source: Aaker & Joachimsthaler (2000)*	• Assists firms in identifying brand applications to all aspects of the organization (internal/external) • Determines best means by which firm will develop brand identity
Building Consumer-Based Brand Equity *Source: Keller (2002)*	• Aids firms in developing a continual process that creates equity through the use of different branding strategies • Particular strategies are identified base on strengths of the firm
4-D Model of Branding *Source: Gad (2001)*	• Model will serve as a tool to better understand the consumer mindset when observing/perceiving brands
The Pyramidal Model of a Brand *Source: Kapferer (1994)*	• Model allows firms to understand way in which brand may/will progress throughout time. • Enables firm to adjust strategy to meet opportunities or threats
The Brand Strategy™ Doctrine Process *Source: Knapp (2000)*	• Gives firms a system to develop a brand and implement or communicate them to consumers
Integrated Brand Model *Source: LePla & Parker (1999)*	• Profile three levels of activity with a brand (from internal to external) • Helps develop drivers that will best reach the consumer

Source: Author (Bruer, S., 2004)

5.12 The Future of Branding

Although it is difficult, if not impossible, to predict the future of branding, many forecasts have been made. The first is that brands will no longer focus on functional values and attributes that can be easily imitated, but on values and personality that are important to consumers [43]. Additionally, it is thought there will be growth in branding service goods, with a focus on consistency. It is also predicted that more high-tech brands will enter Interbrand's listing of the most well-known or profitable brands in the world as marketers become more savvy in converting a successful product into a successful brand. Non-traditional brands are also seen as a potential growth area, these consist of such entities as charities and non-governmental organizations. The growth of brands in international markets is thought to be likely as most markets are not as developed as the United States and Western Europe in this marketing trend. As competition continues to increase and the cost of new product development rises, the use of already existing brands will likely help spread the costs of new product launches and line extensions.

Reiterating a great deal of what was established by Interbrand [43], Murphy [75] adds that brand management will likely differ, as consumer's tastes across national borders are quite similar, leading to the sale of a single product to many populations. This homogeneity of product, however, might not transfer through a brand or marketing campaign, instead, we might see different brands attached to products or conveyed in different ways in order to avoid alienating customers. The rise in the number of branded products available to consumers can be either a source of great competition (as the number of suppliers rise, so does the amount of product on the market from which consumers may choose) or greater customer loyalty (with an influx of product means more difficult choices and the possibility that a consumer will repeatedly purchase goods they are initially satisfied with) – the outcome is yet to be determined.

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