# An investigation into the values dimensions of branding: implications for the charity sector

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- *Branding is being adopted by charities and written about in academic and practitioner charity literature with increasing frequency. There is also growing concern, however, about the over-commercialistion of the sector and the misappropriation of techniques developed specifically for the commercial environment. Literature supporting the claim that charities are values-based organisations is reviewed and the proposition is made that it is in fact the non-negotiability of charity values that differentiate them from commercial organisations. Given the significance of values in the charity sector, the paper argues that a clearer understanding of how values are conceptualised in branding is necessary in order to establish whether branding is an appropriate and effective tool in the charity context. To achieve this, the paper reviews relevant branding literature focusing in particular upon the delineation of the values dimensions identified in for-profit branding models. To aid further understanding of these values dimensions in the non-profit context and their applicability (or otherwise) to it, the metaphors of brand as 'mirror', 'lamp' and 'lens' are introduced.*

- *It is argued that in the corporate sector the brand concept has been utilised to 'mirror' those values that underpin the needs and desires of consumers. In contrast to the passive mirror, when operationalised as 'lamp', it is claimed that the brand aims to influence both the values of the organisation and the values of its target audience. It is postulated that neither of these approaches is appropriate for values-led organisations and that it is only as a metaphorical 'lens', projecting the values of the organisation itself that branding offers an applicable and effective model in the charity context.*

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## Introduction

The appropriation of commercial management techniques by charities during the 1980s resulted in a debate over the suitability of such practices in the not-for-profit environment (Saxton, 1994; Sternberg, 1998; Salamon, 1999). As this debate has intensified the specific practices of branding and brand management are being adopted by charities and written about in the charity sector and academic literature with increasing frequency (Tapp, 1996; Ritchie *et al.*, 1998; Hankinson, 2000; Hankinson, 2001).

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While it has been argued that brand orientation helps voluntary organisations to develop trust across key stakeholder communities (Ritchie *et al.*, 1998), strengthen awareness amongst target audiences (Hankinson, 2000) and build loyalty within donor and supporter groups (Ritchie *et al.*, 1998), both academics and practitioners have expressed concern that the unquestioned adoption of techniques developed in the for-profit context has contributed to the charity sector in becoming over-commercialised (Ritchie *et al.*, 1998; Sternberg, 1998; Salamon, 1999). Referring in general to techniques appropriated from the corporate sector, Saxton warns against using 'ill fitting intellectual hand-me-down[s] of the commercial world' (quoted in Sternberg, 1998, p. 210). Sternberg (1998) argues that the commercialisation of the sector may have resulted in charities losing something of their unique nature, having failed to develop their own identity as values-based organisations.

This paper argues that in order to establish whether branding is an appropriate and effective tool in the charity context, a clearer understanding of how values are conceptualised in branding theory needs to be established. To achieve this the paper commences with a brief review of relevant branding literature, focusing specifically upon the delineation of the values dimensions in for-profit branding models. To aid understanding of these values dimensions in the non-profit context and their applicability (or otherwise) to it, the metaphors of brand as 'mirror', 'lamp' and 'lens' are introduced. Finally, recommendations for future research are made.

## Understanding brand

The roots of branding can be traced back as far as the Middle Ages when craftsmen had begun to 'stamp their mark' on goods as a way of distinguishing them from other suppliers (de Chernatony and McDonald, 1998). By the mid-nineteenth century, in response to changes brought about by the industrial revolution, manufacturers had turned to branding to help differentiate their products from other products in the market place. Differentiation remains the key objective of branding strategy to this day (Kapferer, 2001).

With rapid advances in technology in the twentieth century businesses were able to produce and imitate high quality products that meant that competition was beginning to take place at a product augmentation level (Kotler, 1997). It was no longer sufficient just to promote a product: it had to be enhanced in some way. A brand name, thereby, had become a complex symbol that represented a variety of ideas and attributes (Gardner and Levy, 1955). As markets and consumers became more sophisticated, and as marketers became more aware of the value of brands, brands acquired 'an emotional dimension that reflected the moods and personalities of buyers and the messages they wished to convey to others' (de Chernatony and McDonald, 1998, p. 31). Thus, the focus of branding has shifted from the tangible aspects, such as name, logo and visual features, to the intangible elements, such as personality, non-functional added values, and symbolic benefits (Aaker 1996; Keller 1998).

## Defining brand

For the purposes of this paper de Chernatony and Dall'Olmo Riley's (1998) working definition, which introduces the idea that values are integral to the branding concept, will be adopted:

'Brand is a complex multidimensional construct whereby managers augment products and services with values and this facilitates the process by which consumers confidently recognise and appreciate these values' (p. 427).

De Chernatony and Dall' Olmo Riley (1998) argue that a 'firm's activities (input) and the consumers' perceptions (output) emerge as the two main boundaries of the brand construct' (p. 428). A simplified model demonstrates how the brand becomes the interface between the company and the consumers' perceptions (see **Figure 1**).

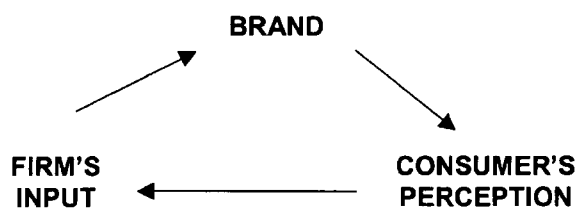**BRAND**

**FIRM'S INPUT** ← **CONSUMER'S PERCEPTION**

Figure 1. Adapted from de Chernatony and Dall'Olmo Riley (1998).

The key dimensions of a brand from a company's perspective are those attributes related to the performance of the brand and the values of the organisation. From the consumer's perspective brand image and value are fundamental aspects of the brand concept. Consumers are likely to repeat a purchase if their needs are monitored and then reflected in the brand's unique cluster of values. The idea that personal values influence purchase decisions is central to consumer behaviour theory (Engel *et al.*, 1993). This supports the argument that there are opportunities to develop brands around consumer-relevant values (Goodyear, 1996). The development of a brand is, therefore, articulated as a cyclical process (see Figure 1) by which the firm imbues the brand with organisational values and values that are unique to the brand whilst continuously monitoring and responding to the needs (and values) of the consumer (de Chernatony and Dall'Olmo Riley, 1998).

## Brand personality and consumer values

The easiest way for a consumer to know if a brand's values reflect their own values (actual or ideal) is via a brand personality (de Chernatony and McDonald, 1998). To personify a brand, the brand is imbued with human values and characteristics with which consumers identify (e.g. genuine, energetic, rugged etc) (Aaker, 1996). Researchers have argued that the brand personality construct fulfils a range of different symbolic functions for consumers that relate to the need for social approval or personal expression (Keller, 1993). It has been suggested that the brand is

used by a purchaser to express his or her own self (Belk, 1988) or the ideal self (Malhotra, 1988) and as such is instrumental in driving consumer behaviour (Biel, 1993). Anthropomorphising inanimate objects is universal (Brown, 1991) and is thought to occur so that human beings may make sense of their relationship with the material world (Fournier, 1998).

Whilst academics have expressed considerable interest in the concept of brand personality, analytical research on brand personality and the symbolic use of brands is limited. This has resulted in the absence of a recognised and accepted brand personality definition and an understanding of exactly how brand influences consumer preference (Aaker, 1997). Whilst no accepted theoretically-grounded definition of brand personality exists, the importance of the symbolic use of psychological values in differentiating brands and building brand loyalty is generally recognised as being central to a holistic understanding of brands (Kapferer, 1992; Aaker, 1996; de Chernatony and Dall'Olmo Riley, 1998). Before looking at the values dimensions of brand in greater detail, and their applicability (or otherwise) in the charity context, it is important to consider the role that values play in the charity context and explore how branding is currently applied in charitable organisations.

## Charity values

Values are a charity's *raison d'être*, giving legitimacy to its very existence (Hudson, 1995; Aiken, 2005). Without these values some charities either would not exist, or should not exist (Batsleer *et al.*, 1991). Sargeant and Lee (2001) support this view in claiming that the consideration of values lie at the heart of every charity. Although difficult to identify (Becker and Conner 1986), it is argued that the maintenance and development of values is important both to the sector and to the wider society. According to Bruce (1998) charities must be explicit about their values and philosophy, which should then become the bedrock of their work. They should form an

integral part of the mission and vision statements and underpin the marketing operation. For example, if a charity claims that its objective is to empower people to be more independent then the charity must ensure that those with whom they work are treated with dignity and respect (Bruce, 1998).

For an organisation to work towards a specific charitable purpose of benefit to society, it must have a value system that both underpins and indeed drives the charity's operations. This implies that the values are not optional or negotiable but are integral to the organisation itself. This contrasts with the more flexible nature of values in the commercial context, the objective of which is to ensure survival in an external environment (Schein, 1985). It is therefore suggested that it is not the charity sector's dependence upon values *per se* that distinguishes it from the corporate sector, but rather the non-negotiability of its values (Stride, 2001).

## The application of branding in the charity context

As the not-for-profit sector becomes increasingly competitive, with an estimated 10 000 new charities joining the sector every year (Hankinson, 2000), there is little doubt that branding is being adopted by some charities as a way of differentiating themselves from other organisations (Grounds and Harkness, 1998; Hankinson, 2000). Tapp (1996) reports that some charities are beginning to embrace the branding concept, with many adopting a professionally designed logo (Tapp, 1996). He contends however that many are failing to adequately develop their brands especially as mechanisms of self-expression for supporters and donors. Hankinson (2000) adds that brand personalities in the charity sector are often confused, resulting in different stakeholders perceiving brands in different ways.

Although the intangible or emotional aspects of branding may be undeveloped in the not-for-profit sector (Tapp, 1996), the alignment of a supporter's values with those of the charity is

considered to be key to the non-exchange experience (Lindsay and Murphy, 1996). As such a brand should emerge from the organisation itself and communicate to supporters the values that underpin everything that the charity stands for (Saxton, 1994; Dixon, 1996). Thus in developing Barnado's brand, for example, the views of the internal audience — employees, volunteers and other internal stakeholders — were seen as essential (Grounds and Harkness, 1998). Similarly with VSO's (Voluntary Service Overseas) brand process the goal was to involve everyone. This, it was felt, reflected the desire to create a culture where employees' thoughts and ideas were 'valued and acted upon' (Ind and Bell, 1999). A brand that emerges from the organisation and therefore reinforces its values also facilitates the building of trust (Tapp, 1996). Trust is considered to be of particular importance in the charity context (Sargeant and Lee, 2001), playing a central role in determining donor behaviour (Burnett, 1992) by offering assurance that funds are being used appropriately (Ritchie *et al.*, 1998).

## The use of metaphors to explore further the values dimensions of brand

Given the importance of values to not-for-profit organisations, it is surprising that brand commentators in the not-for-profit sector have not given more consideration to the relationship between brand and individual, social, and organisational values. This paper will start to investigate this relationship by exploring how values are conceptualised in for-profit branding models; the metaphors of brand as 'mirror', 'lamp' and 'lens' will be used to assist this process. Metaphors are used by human beings as a way of making sense of a subjective reality in such a way that it can be shared with others (Cassierer, 1946, 1955 in Morgan, 1980). They are a form of symbolism whereby meaning is taken from one image and transferred to another image in order to create new meaning (Black, 1962 in Morgan, 1980). Metaphors,

therefore, provide a powerful way of investigating the conceptualisation of values in branding.

## Brand as mirror

The metaphor of 'mirror' is used to demonstrate how the values with which consumers identify or to which they aspire are 'mirrored' back to them via the brand image. This is achieved by imbuing a brand with human characteristics via a brand personality (Keller, 1998). A personality provides a brand with an emotional dimension that can then reflect the consumers' 'moods and personalities' in order to positively effect purchasing behaviour (de Chernatony and McDonald 1998). The personification of a brand is most easily achieved through marketing techniques, such as advertising, celebrity endorsement, user imagery and anthropomorphisation (Keller, 1998). By associating with the brand personality at an emotional level, the consumer is able to derive both emotional and self-expressive benefits (Aaker, 1996).

To understand why consumers benefit from such associations, it is important to understand the role that possessions play in developing our sense of self. Quoting the psychologist William James (1890), Belk (1988) argues that we are the sum of our possessions. He continues that identity is important for our self-esteem and possessions help to develop our sense of who we are. Possessions can be important to identity even if they possess characteristics that are different to the perceived characteristics of the self (Belk, 1988). Crucial to the success of branding is that the self can also be extended symbolically; if an object or brand is perceived to have values, qualities or characteristics to which the consumers aspire, they live in hope that some may 'magically rub off' on them (Levi-Strauss, 1963). Boulding (1956) was one of the first writers to recognise the commercial importance of image, claiming that people do not respond to reality but to their perception of reality.

The values to which consumers aspire, and which are therefore reflected back to them via

the brand image, are a manifestation of 'irrational needs rather than rational choice' (Lear, 1994). Market research techniques, such as focus groups, that aim to uncover consumers' irrational needs and desires have been criticised for probing into people's secret distress in order to influence choice behaviour (Packard, 1957).

## Implications for Charities

In the charity sector the use of brand as mirror raises critical questions. If values underpin an organisation's very existence (Hudson, 1995; Bruce, 1998), these values are by definition non-negotiable and should not, therefore, be open to manipulation in response to changing fashions and fads in the wider commercial market place. As Ritchie et al point out, ' To succeed, a non-profit brand must offer a positive image, while faithfully reflecting the values and activities of the organisation' (1998, p. 39).

Probably of equal importance to this debate, however, is the use of marketing techniques that are said to manipulate and exploit human vulnerability. Brand as 'mirror' reflects the 'irrational needs and desires' of consumers that are not only unrelated to the product or service but which the consumer believes will, through association alone, transfer to themselves. This 'illusion' or image forms the very basis of symbolic branding and is likely to sit uncomfortably with the type of 'higher' values often associated with charitable organisations.

So whilst charities are being criticised for failing to provide supporters with a vehicle through which they can say something about themselves (Tapp, 1996) the brand personality construct would appear to have a fundamentally different role to play in charities if it is to help facilitate the process of creating identities as values-based organisations.

## Brand as lamp

The metaphor of brand as 'lamp' is used to illustrate how a brand's own unique values are shone like a light externally and internally in an

attempt to influence the values of its target audience and those of the host organisation. As a metaphorical lamp, it is argued that brands attempt to influence consumer behaviour. Unlike brand as mirror, which reflects values to which consumers consciously aspire, as lamp, brands are imbued with 'distorted individual and social values' (Hestroni, 2000) the sole aim of which is to influence purchasing behaviour (Aaker, 1996). As such the advertiser has become 'the philosopher-king of commercial culture' (Randall Rothberg, quoted in Klein, 2000) and in so doing has received growing criticism from the populist anti-branding lobby (Klein, 2001; Quart, 2003).

To understand how branding has been able to adopt this role it is useful to consider the work of Galbraith (1958). Consumers are most open to persuasion, the further they get from physical wants and are thus in a state whereby they are unclear as to what their wants actually are. This uncertainty is addressed by the social value system in which a key social objective is to obtain a higher standard of living, defined as a desire for 'superior goods' (Dusenberry, 1949). It becomes the role of advertising and salespeople, therefore, to create desires that previously did not exist; 'to fill a void that it has itself created' (Galbraith, 1958, p. 129). In creating the wants it is there to satisfy, production becomes dependent upon the 'discreet manipulations of the persuaders' — the advertisers and salespeople (Galbraith, 1958, p. 131). As such, marketers become 'cultural engineers' influencing how people think and feel through branded products (Holt, 2002). The brand therefore attempts to influence the purchasing behaviours of consumers, even when consumers might otherwise have no expressed need of the product or service associated with the brand.

The second aim of brand as lamp is to influence the values and behaviour of the host organisation. Increasingly brands are being linked to company values with greater emphasis being placed upon how managers and staff make brands unique (de Chernatony, 1999). The approach focuses on employee involvement in brand relationship building. Whilst it is

has long been accepted that an alignment of organisational values and brand values is desirable (Kapferer, 1992; Aaker, 1996) current thinking suggests that brand performance is enhanced if instead of the brand reflecting the values of the organisation, the values of organisation are aligned with those of the brand, with staff demonstrating their commitment to the delivery of these values (de Chernatony, 1999).

## Implications for charities

In its capacity as lamp, one of the objectives of a brand is to influence the values and behaviour of consumers. As such the notion of brand manager as cultural engineer (Holt, 2002) has emerged and with it branding has received much criticism (Klein, 2001). In the charity sector such criticism is likely to be responsible at least in part for the internal resistance often encountered when the corporate branding model is adopted by charities (Ritchie et al., 1998). Qualitative research with leading UK charity directors who had been directly involved with their organisation's branding process, spoke of branding initially being a 'dirty word' and there being 'varying degrees of comfort' with the use of the term (Stride, 2004). Charities that use branding techniques run the risk, therefore, of appearing to have become too commercial, of having 'sold out' (Ritchie et al., 1998, p. 36).

Whilst the normative nature of charitable activity means that it is not the role of charities to create needs and desires that will result in greater consumption, many have been criticised for using advertising to manipulate audiences by eliciting feelings of anger (Wnek, 2003), guilt (Doddington et al., 1994), pity (Barnett and Hammond, 1999) and fear (Hevey, 1992). The use of advertising by disability charities that projects negative images of beneficiaries in an attempt to increase levels of donation has also been criticised for reinforcing prejudice and negative stereotypes (Doddington et al., 1994; Barnett and Hammond 1999). Given the perceived negative impact on the brand that expensive advertising can have

(Stride, 2004) charities may benefit from exploring ways in which brands can be successfully developed without resorting to advertising, a policy associated with Anita Roddick and Body Shop (Shapiro, 1988).

The second role of brand in its capacity as lamp is to influence the underlying values of the host organisation. In the charity context, however, an organisation's values are the bedrock of everything that it does. They underpin a charity's operations and are the criteria against which donors decide to offer their support and staff judge its suitability as a potential employer. To maintain the integrity of the charity brand therefore, so crucial in creating a sense of trustworthiness, the brand values must emanate from the organisation itself, reflecting the values of staff and other key stakeholders. When a charity attempts to use it's brand image simply as a tool with which to elicit a certain response, in the way that Barnardo's did with its much criticised campaign in 2003 (Wnek, 2003), then it runs the risk of both compromising the values upon which the organisation's reputation depends and losing the trust of its internal and external stakeholders (Tapp, 1996).

## Brand as lens

As a metaphorical 'lens' brand projects with clarity and precision the values upon which the organisation is based. The focus then moves away from brand image that is continually changing to company reputations that are more constant (Fombrun, 1997). While de Chernatony (1999) may claim that there is a need for the values and behaviour of staff to be aligned with the desired values of the organisation's brand there is evidence that organisations must remain faithful to their core values if they are to enjoy lasting success (Collins and Porras, 1995; de Geus, 1997). Such companies have a set of explicit core values that are not compromised by the changing demands of the marketplace but remain fixed, and many of these values have a likeable or humanist dimension (Collins and Porras, 1995). Even in the for-profit context, therefore, this implies

that the brand manager needs to remain true to at least a core set of organisational values whilst also reflecting the needs of the customer in the brand's unique cluster of values (de Chernatony, 1999).

## Implications for charities

It is in its capacity as lens, projecting the non-negotiable values that underpin a charity's mission and that emanate from the organisation's culture, that branding is most applicable and effective in the charity context. It is only by developing a brand identity around values that are shared by the organisation's key stakeholders that a charity can claim that its values system underpins its activities and is indeed its very reason for existing.

Despite the clear importance of values in the charity sector (Saxton, 1994; Sternberg, 1998), it is ironic that there is a shortage of research in the charity literature defining or explaining the role of organisational values in the charity context. There is, however, considerable discussion and debate regarding the significance of organisational values within the organisational behaviour discipline. This discussion may well provide some utility in furthering the understanding of the significance of values in brand construction in the non-profit context.

As lens, branding provides a tool whereby charities can benefit from differentiation while also developing their identity as values-led organisations. Having identified its core values, a charity must either seek out supporters and donors whose values reflect its own, or aim to create a vision that is so powerful that it inspires people to share both its vision and its values.

## Images and integrity

What needs to be acknowledged, however, is the challenge charities face to make themselves heard in a world where increasingly aggressive and intrusive commercial advertising has desensitised consumers (Klein, 2000). Consumers 'are like roaches' claims David Lubars (Klein, 2000) '...you spray them and spray

them and they get immune after a while'. It has been suggested by some commentators this is equally true in charity context, where organisations are using increasingly shocking tactics to get their message across (Wnek, 2003). This approach, however, has been shown to create internal tensions. Under pressure to 'get the cash in', fundraisers often resort to adopting a 'sound bite' approach supported by negative images, while service providers and campaigners are more likely to want to portray beneficiaries positively and communicate the cause in holistic terms (Stride, 2004, p. 233). One senior charity communications executive has described this tension as 'trying to hold two wild horses running in the opposite direction' quoted in Stride, 2004.

Whilst recognising that it is beyond the scope of this paper to address this dilemma, charities may need to do nothing more than simply report things as they are. In his response to criticism about Barnardo's cockroach advertisement that attracted a record number of complaints to the Advertising Standards Authority, Mark Wnek (2003) suggests that it was the contrived nature of Barnardo's advertisement that left people feeling uncomfortable and angry. Referring on the other hand to the RSPCA's advertisement of a pile of dead dogs, he suggests that on this occasion 'an entire nation [focused] on a cruel truth rather than on the advertising agency'.

## Further research

The use of the metaphors of brand as 'mirror', 'lamp' and 'lens' has highlighted the potential ways in which the values construct in branding may conflict with values in the charity context. Future research might test empirically the importance of congruence between organisational values, donor perception of organisational values as communicated via the brand and donors' own individual values in promoting greater commitment to the cause.

## Conclusions

Whilst there is growing evidence that branding is being adopted by charitable organisations, it would appear that the values dimensions of branding is either little understood or is simply not being applied in this context. This is surprising given the importance that charities place on values, claiming that it is indeed their values that underpin their very existence. Yet, with the shift in branding theory from a focus on the tangible aspects of brand (such as name and logo) to the intangible or symbolic aspects (such as identity, personality and image) it is the values dimensions of branding that now form the essence of the branding experience in the commercial context. Through the use of the metaphors of brand as mirror, lamp and lens this paper has demonstrated the meaning, role and application of values in the for-profit branding context and the implications for charitable organisations. It has been argued that only when operationalised as lens is branding a suitable and applicable technique in the not-for-profit context. As 'lens' branding would still provide charities with a powerful mechanism for differentiating themselves in an increasingly competitive environment whilst ensuring that the values upon which their existence was dependent were not undermined. This in turn would allow charities in general to develop their own identity as values-based organisations.

## Acknowledgements

## Biographical note

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