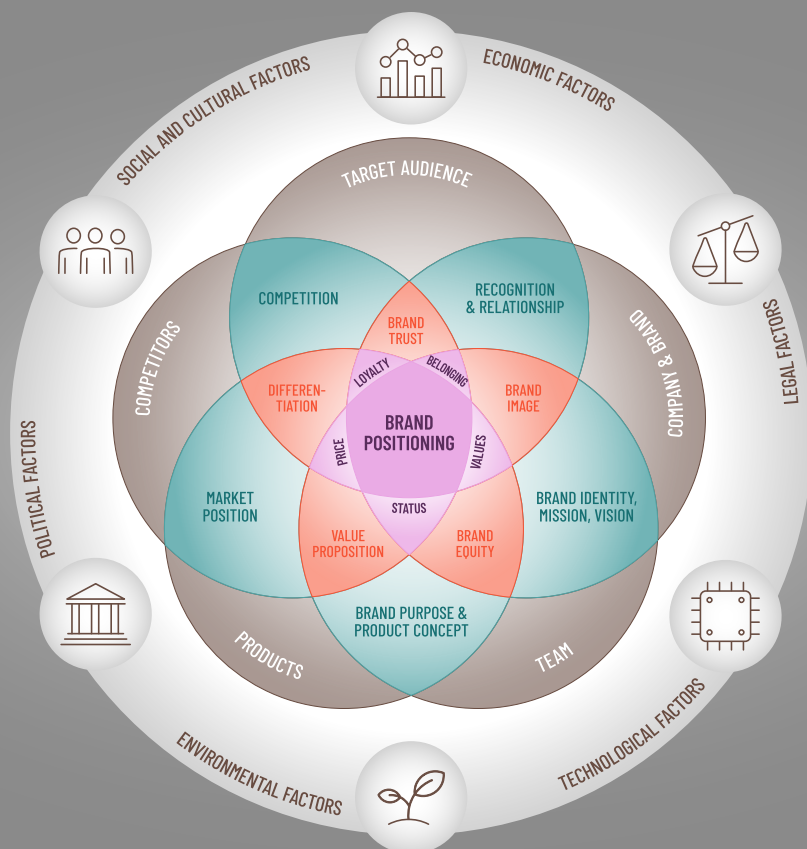


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# BRAND POSITIONING FOR SUSTAINABLE BUSINESS DEVELOPMENT

Doctoral Thesis



**RIGA TECHNICAL UNIVERSITY**

Faculty of Engineering Economics and Management

Economics and Business Institute

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# **BRAND POSITIONING FOR SUSTAINABLE BUSINESS DEVELOPMENT**

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# **DOCTORAL THESIS PROPOSED TO RIGA TECHNICAL UNIVERSITY FOR THE PROMOTION TO THE SCIENTIFIC DEGREE OF DOCTOR OF**

To be granted the scientific degree of Doctor of Science (PhD) in Social Sciences (in the field of Economics and Business), the present Doctoral Thesis is submitted for defence at the open meeting of the RTU Promotion Council on 25 August 2026 at the Faculty of Engineering Economics and Management of Riga Technical University, Kalnciema street 6, Room 209.

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I hereby declare that the Doctoral Thesis submitted for review to Riga Technical University for promotion to the scientific degree of Doctor of Science (PhD) in Social Sciences (in the field of Economics and Business) is my own. I confirm that this Doctoral Thesis has not been submitted to any other university for promotion to a scientific degree.

The Doctoral Thesis has been written in English. It consists of an Introduction, three chapters, Conclusions, 34 figures, 30 tables, and 16 appendices; the total number of pages is 209. The Bibliography contains 276 titles.



## ANOTĀCIJA

Globālo tirgu dinamika, digitalizācija un mainīgās ieinteresēto pušu prasības padara ilgtspējīgu uzņēmējdarbību par stratēģisku nepieciešamību. Viens no būtiskākajiem instrumentiem konkurētspējas un ilgtermiņa izaugsmes nodrošināšanai ir zīmola pozicionēšana. Tradicionāli tā uzskatīta par mārketinga komunikācijas rīku, taču jaunākie pētījumi to arvien biežāk aplūko kā daudzdimensionālu konstrukt ar stratēģisku un vadības nozīmi. Tomēr esošās pieejas joprojām ir fragmentētas, koncentrējoties uz komunikāciju, patērētāju uztveri vai identitāti, bet nenodrošinot holistisku ietvaru, kas integrētu iekšējo loģiku, ārējo vidi, stratēģisko pozīciju, veikspējas rādītājus un rezultātus.

Promocijas darba mērķis ir pētīt zīmola pozicionēšanu kā stratēģisku pieeju ilgtspējīgas uzņēmējdarbības attīstībai, izstrādājot un empīriski validējot Holistisko zīmola pozicionēšanas modeli (HBPM). Pētījuma uzdevumi ietver teorētisko sintēzi, Teorētiskā zīmola pozicionēšanas konceptuālā modeļa (TBPCM) izstrādi, modeļu klasifikācijas un konceptuālo ietvaru radīšanu, hipotēžu formulēšanu, fokusgrupu diskusijas, ekspertu intervijas deviņās nozarēs, kā arī praktisku piemērošanu (*Joy for Tails*), līdz tiek izstrādāts un validēts zīmola pozicionēšanas modelis – HBPM.

Galvenie rezultāti apliecina, ka zīmola pozicionēšana nav tikai mārketinga aktivitāte, bet stratēģisks resurss, kas stiprina uzņēmuma veikspēju, ieinteresēto pušu saskaņotību un ilgtermiņa ilgtspēju. Identitātes, misijas un vīzijas skaidra definēšana ir cieši saistīta ar diferenciaciju, uzticību un kapitālu, savukārt ārējo faktoru integrēšana nodrošina stratēģisko atbilstību tirgus kontekstam. HBPM tika validēts kā konceptuāls un diagnostisks instruments, kas palīdz uzņēmumiem izvērtēt pozicionēšanas briedumu, noteikt vājās vietas un to saistītos elementus, kā arī noteikt stratēģiskās prioritātes.

Galvenā zinātniskā novitāte ir HBPM izveide un validācija, integrējot piecas dimensijas un 25 elementus vienotā sistēmā. Izstrādātās zinātniskās novitātes ietver jaunas atziņas un zīmola pozicionēšanas koncepcijas paplašinājumu. Darbs aizpilda zinātnisko plaisu, kas saistīta ar fragmentētu zīmola pozicionēšanas izpratni, un apliecina, ka pozicionēšana ir jāuztver kā stratēģisks pārvaldības mehānisms.

Pētījums veikts Latvijas un Baltijas biznesa kontekstā, taču tajā iesaistīto eksportējošo uzņēmumu pieredze apliecina HBPM piemērojamību starptautiskos tirgos. Promocijas darbs sniedz ieguldījumu teorijā, risinot fragmentācijas problēmu zīmola pozicionēšanas pētniecībā, un praksē, piedāvājot vadītājiem strukturētu ietvaru stratēģisko lēmumu pieņemšanai ilgtspējīgā zīmola vadībā.

## ABSTRACT

Global market dynamics, digitalisation, and evolving stakeholder expectations make sustainable business development a strategic imperative. One of the most important instruments for achieving competitiveness and long-term growth is brand positioning (BP). Traditionally regarded as a marketing communication tool, recent research increasingly recognises it as a multidimensional construct with strategic and managerial significance. However, existing approaches remain fragmented, focusing on communication, consumer perception, or identity, without providing a holistic framework that integrates internal brand logic, external environment, strategic positioning, performance indicators, and outcomes.

This Doctoral Thesis investigates brand positioning as a strategic approach to sustainable business development by designing and empirically validating the holistic brand positioning model (HBPM). The research tasks include theoretical synthesis, the development of the theoretical brand positioning conceptual model (TBPCM), the introduction of model classifications and conceptual frameworks, hypothesis formulation, focus group discussions, expert interviews across nine industries, and a practical application (*Joy for Tails*), leading to the creation and validation of the HBPM.

The main findings confirm that brand positioning is not merely a marketing activity but a strategic resource that enhances organisational performance (OP), stakeholder alignment, and long-term sustainability. A clear definition of identity, mission, and vision is strongly associated with differentiation, trust, and brand equity. The integration of external influences ensures strategic alignment with the market context. The HBPM was validated as both a conceptual and diagnostic instrument that enables organisations to assess positioning maturity, identify weaknesses and their interconnected elements, and determine strategic priorities.

The core scientific novelty lies in the development and validation of the HBPM, which integrates five dimensions and 25 elements into a unified system. The scientific novelties developed include new insights and an extension of the concept of brand positioning. The Doctoral Thesis addresses the long-standing scientific gap caused by fragmented perspectives on brand positioning and demonstrates that positioning should be understood as a strategic management (SM) mechanism.

Although the empirical validation was conducted in the Latvian and Baltic business context, the involvement of export-oriented companies illustrates the model's applicability in international markets. The Doctoral Thesis contributes to theory by addressing the fragmentation problem in brand positioning research and to practice by offering managers a structured framework for strategic decision-making in sustainable brand management.

# TABLE OF CONTENTS

|                                                                                                                                                         |    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| ABSTRACT .....                                                                                                                                          | 5  |
| LIST OF ABBREVIATIONS .....                                                                                                                             | 8  |
| LIST OF FIGURES.....                                                                                                                                    | 9  |
| LIST OF TABLES .....                                                                                                                                    | 11 |
| LIST OF APPENDICES .....                                                                                                                                | 12 |
| ACKNOWLEDGEMENTS .....                                                                                                                                  | 13 |
| INTRODUCTION.....                                                                                                                                       | 14 |
| 1. THE THEORETICAL BACKGROUND.....                                                                                                                      | 27 |
| 1.1. The theoretical framework of brand positioning.....                                                                                                | 27 |
| 1.1.1. Historical development of brand positioning .....                                                                                                | 27 |
| 1.1.2. Brand positioning concept review .....                                                                                                           | 30 |
| 1.1.3. An overview of the types of brand positioning strategies .....                                                                                   | 44 |
| 1.1.4. Literature review of models of brand positioning and branding.....                                                                               | 46 |
| 1.2. The importance of brand positioning strategy in business development .....                                                                         | 49 |
| 1.2.1. Factors affecting sustainable business development .....                                                                                         | 49 |
| 1.2.2. Factors that contribute to brand economic viability and long-term growth .....                                                                   | 53 |
| 1.2.3. The impact of brand positioning on organisational performance and<br>organisational sustainability .....                                         | 56 |
| 1.2.4. Integrating brand positioning into strategic management.....                                                                                     | 59 |
| 1.2.5. Principles of successful brand positioning .....                                                                                                 | 61 |
| 1.2.6. Limitations of existing brand positioning approaches .....                                                                                       | 65 |
| 1.3. Scientific gap and problem statement .....                                                                                                         | 66 |
| 1.4. Summary of theoretical foundations and conceptual logic .....                                                                                      | 68 |
| 2. ANALYSIS OF FACTORS AND COMPONENTS INFLUENCING BRAND<br>POSITIONING.....                                                                             | 70 |
| 2.1. Qualitative content analysis of elements of brand positioning definitions .....                                                                    | 70 |
| 2.1.1. Initial review and open coding. ....                                                                                                             | 71 |
| 2.1.2. Frequency mapping .....                                                                                                                          | 72 |
| 2.2. Qualitative content analysis of elements of theories, citations about brand<br>positioning, and analysis of the impact of elements on objects..... | 73 |
| 2.2.1. Frequency analysis .....                                                                                                                         | 74 |
| 2.2.2. Influence domain mapping.....                                                                                                                    | 76 |
| 2.2.3. Conceptual grouping .....                                                                                                                        | 78 |

|        |                                                                                                              |     |
|--------|--------------------------------------------------------------------------------------------------------------|-----|
| 2.3.   | Classification of brand positioning models and analysis of unique attributes of the models.....              | 79  |
| 2.4.   | Impact of brand positioning on the decision-making process of the customer .....                             | 87  |
| 2.4.1. | Human decision-making behaviour and brand interaction .....                                                  | 88  |
| 2.4.2. | Conceptual model of brand loyalty – interactions with stakeholders in the context of brand positioning ..... | 89  |
| 2.5.   | Development of hypotheses .....                                                                              | 91  |
| 3.     | EMPIRICAL STUDY.....                                                                                         | 93  |
| 3.1.   | Overview of the empirical research design .....                                                              | 93  |
| 3.2.   | Development of a new theoretical brand positioning model.....                                                | 97  |
| 3.3.   | Validation of the theoretical brand positioning conceptual model .....                                       | 100 |
| 3.4.   | Practical refinement of the model: in-depth interviews and business case implementation .....                | 104 |
| 3.4.1. | Adaptation of the brand positioning model for qualitative evaluation.....                                    | 104 |
| 3.4.2. | In-depth expert interviews with experienced professionals .....                                              | 107 |
| 3.4.3. | Practical application of the HBPM model for new brand development and strategic positioning .....            | 128 |
| 3.5.   | Development of a final holistic brand positioning model .....                                                | 135 |
| 3.5.1. | Conceptual structure and theoretical foundations of the HBPM.....                                            | 135 |
| 3.5.2. | Practical applicability of the HBPM .....                                                                    | 141 |
| 3.5.3. | Unique contributions of the HBPM .....                                                                       | 142 |
| 3.6.   | Hypothesis validation: Integrating brand positioning into strategy .....                                     | 143 |
|        | CONCLUSIONS AND RECOMMENDATIONS.....                                                                         | 153 |
|        | BIBLIOGRAPHY .....                                                                                           | 158 |
|        | APPENDICES.....                                                                                              | 173 |

## LIST OF ABBREVIATIONS

|              |                                                |
|--------------|------------------------------------------------|
| <b>BD</b>    | brand development                              |
| <b>BP</b>    | brand positioning                              |
| <b>BPE</b>   | brand positioning element/elements             |
| <b>CFCA</b>  | Central Finance and Contracting Agency         |
| <b>HBPM</b>  | holistic brand positioning model               |
| <b>LFSCC</b> | Latvian Food Sector Competence Centre          |
| <b>OP</b>    | organisational performance                     |
| <b>OS</b>    | organisational sustainability                  |
| <b>RBV</b>   | resource-based view                            |
| <b>RTU</b>   | Riga Technical University                      |
| <b>SM</b>    | strategic management                           |
| <b>TBPCM</b> | theoretical brand positioning conceptual model |

## LIST OF FIGURES

| No. | No. of Figure | Figure                                                                                                                                       |
|-----|---------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | 1             | Logic and design of the research process                                                                                                     |
| 2   | 1.1           | The overview of the conceptual history of entrepreneurial thought in brand positioning context                                               |
| 3   | 1.2           | Model of decision-making from the prism of positioning                                                                                       |
| 4   | 1.3           | Brand hexagon model                                                                                                                          |
| 5   | 1.4           | The elements of value pyramid                                                                                                                |
| 6   | 1.5           | Core value framework linking a corporate brand to product brands                                                                             |
| 7   | 1.6           | A resource-based approach to strategy analysis: a practical framework                                                                        |
| 8   | 1.7           | Estimated economic value                                                                                                                     |
| 9   | 2.1           | Frequency of brand positioning elements in 31 definitions                                                                                    |
| 10  | 2.2           | Frequency of theoretical brand positioning elements (N = 56)                                                                                 |
| 11  | 2.3           | Proportional share of brand positioning elements based on frequency of mentions                                                              |
| 12  | 2.4           | Correspondence of elements to objects of influence                                                                                           |
| 13  | 2.5           | Grouped theoretical elements by conceptual category                                                                                          |
| 14  | 2.6           | Theoretical aspects of brand positioning                                                                                                     |
| 15  | 2.7           | Classification of methodological approaches in brand positioning models                                                                      |
| 16  | 2.8           | Distribution of methodological approaches in brand positioning and branding models                                                           |
| 17  | 2.9           | The model of human decision-making process and its interaction with brand positioning                                                        |
| 18  | 2.10          | Conceptual model: brand interactions with stakeholders: the context of brand positioning                                                     |
| 19  | 2.11          | Conceptual model: interaction between brand positioning, strategic management, organisational performance, and organisational sustainability |
| 20  | 3.1           | Integrated research structure for the development and validation of the holistic brand positioning model                                     |
| 21  | 3.2           | Initial model: theoretical brand positioning conceptual model                                                                                |
| 22  | 3.3           | Interview mapping framework aligned with holistic brand positioning model dimensions and strategic topics                                    |
| 23  | 3.4           | Normalised average ratings by dimension (0–1 scale)                                                                                          |
| 24  | 3.5           | Correlation heatmap across brand positioning dimensions (D1-D5)                                                                              |
| 25  | 3.6           | Correlation heatmap across elements                                                                                                          |
| 26  | 3.7           | Correlation heatmap across organisations                                                                                                     |

|    |      |                                                                                                                                             |
|----|------|---------------------------------------------------------------------------------------------------------------------------------------------|
| 27 | 3.8  | Distribution of strong and weak elements in each organisation (A–M)                                                                         |
| 28 | 3.9  | Overview of radar chart profiles across organisations                                                                                       |
| 29 | 3.10 | The brand and customer touchpoints in the context of brand image development                                                                |
| 30 | 3.11 | Validated the holistic brand positioning model                                                                                              |
| 31 | 3.12 | A comparison of the impact of brand positioning on outcomes with brand positioning embedded in strategic management                         |
| 32 | 3.13 | Pearson correlation heatmap of survey questions                                                                                             |
| 33 | 3.14 | Strategic integration of brand positioning: key themes from focus groups and interviews                                                     |
| 34 | 3.15 | Validated model: interaction between brand positioning, strategic management, organisational performance, and organisational sustainability |

## LIST OF TABLES

| No. | No. of table | Table                                                                                  |
|-----|--------------|----------------------------------------------------------------------------------------|
| 1   | 1.1          | Overview of brand positioning definition                                               |
| 2   | 1.2          | A compilation of diverse brand positioning strategies                                  |
| 3   | 1.3          | Brand positioning models                                                               |
| 4   | 1.4          | Factors that contribute to sustainable business development                            |
| 5   | 1.5          | Factors that contribute to brand economic viability and long-term growth               |
| 6   | 1.6          | Factors that contribute to brand economic viability and organisational performance     |
| 7   | 1.7          | Summary of brand positioning dimensions and conceptual structure                       |
| 8   | 2.1          | Refinement of conceptual group labels for brand positioning elements                   |
| 9   | 2.2          | Frequency of brand positioning element groups across 31 definitions                    |
| 10  | 2.3          | Frequency of brand positioning elements in theoretical sources (N = 56)                |
| 11  | 2.4          | Compliance of brand positioning elements with the object of influence                  |
| 12  | 2.5          | Grouping of theoretical brand positioning elements by category                         |
| 13  | 2.6          | Unique attributes of the models                                                        |
| 14  | 2.7          | Unique attributes and methodological approaches of brand positioning models            |
| 15  | 2.8          | Overview of positioning elements across brand positioning and branding models          |
| 16  | 3.1          | The structured model development process                                               |
| 17  | 3.2          | Dimensions and included elements of the theoretical brand positioning conceptual model |
| 18  | 3.3          | Characteristics of focus group participants                                            |
| 19  | 3.4          | Characteristics of interview participants                                              |
| 20  | 3.5          | Evaluation structure – five dimensions and 25 elements                                 |
| 21  | 3.6          | Assessment scale and question framework by dimensions                                  |
| 22  | 3.7          | Expert interview results: summary of element evaluation data                           |
| 23  | 3.8          | Average score per dimension                                                            |
| 24  | 3.9          | Normalised interview data by dimensions                                                |
| 25  | 3.10         | Summary of correlation analysis of holistic brand positioning elements                 |
| 26  | 3.11         | Structure of the holistic brand positioning model                                      |
| 27  | 3.12         | Mapping the holistic brand positioning model elements to scholarly sources             |
| 28  | 3.13         | Element description of the holistic brand positioning model                            |
| 29  | 3.14         | Characteristics of survey respondents                                                  |
| 30  | 3.15         | Normalised survey result data                                                          |



## LIST OF APPENDICES

| Appendix No. | Appendix                                                                                                  |
|--------------|-----------------------------------------------------------------------------------------------------------|
| Appendix 1   | Qualitative content analysis of elements of brand positioning definitions (N = 31)                        |
| Appendix 2   | Theoretical citations and conceptual coding of brand positioning elements (N = 56)                        |
| Appendix 3   | Brand positioning models (N = 9)                                                                          |
| Appendix 4   | Decision-making model from the prism of positioning, simplified version                                   |
| Appendix 5   | Focus group question guide for initial theoretical brand positioning conceptual model validation          |
| Appendix 6   | Key takeaways from focus group discussions                                                                |
| Appendix 7   | Expert-interview question guide by dimension                                                              |
| Appendix 8   | Initial expert evaluation of brand positioning model dimensions (unscaled data)                           |
| Appendix 9   | Normalised data of expert interviews                                                                      |
| Appendix 10  | Interview results: distribution of strong and weak element scores across organisations                    |
| Appendix 11  | Interview results: thematic coding structure and emergent categories                                      |
| Appendix 12  | Interview results: radar chart profiles across organisations                                              |
| Appendix 13  | The roadmap for new product development (for the <i>Joy for Tails</i> brand) – a reflection of activities |
| Appendix 14  | Prototype development, pilot scaling in the production environment, and testing ( <i>Joy for Tails</i> )  |
| Appendix 15  | Examples of marketing and visual brand communication materials for <i>Joy for Tails</i>                   |
| Appendix 16  | Validation of hypotheses: survey questions and results                                                    |

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# INTRODUCTION

**Research relevance.** In the context of global market dynamics, increasing digitalisation, and evolving stakeholder expectations, sustainable business development has become a strategic imperative for organisations across industries. One of the key instruments for achieving competitive and sustainable advantage is **brand positioning (BP)**. This construct defines how consumers perceive a brand, identify with its values, and differentiate it from competitors.

Although BP has traditionally been regarded as a marketing communication tool, whether it applies to brand and product positioning in the market (e.g., price, channels, identity), recent strategic thinking recognises it as a multidimensional and structurally embedded process, capable of influencing both OP and long-term sustainability. In a highly saturated informational environment, where consumer attention is fragmented and competitive pressure is intense, precise and strategically integrated BP becomes essential for creating meaningful differentiation and building long-term brand–consumer relationships.

In the contemporary business environment, BP has become a critical factor in determining organisational competitiveness and long-term growth. A large body of research has demonstrated that positioning significantly influences consumer perceptions, brand equity, and financial outcomes, thereby establishing it as a cornerstone of strategic brand management (e.g., Aaker, 1996; Kapferer, 2012; Keller, 2001; Kotler & Keller, 2016). At the same time, recent studies have emphasised that positioning is not merely a communication tool but a complex, multidimensional construct that must address internal and external dynamics simultaneously.

Emerging perspectives extend the understanding of positioning beyond traditional marketing boundaries. Some recent perspectives highlight positioning as a process of resolving complex stakeholder dynamics, whether by addressing social dilemmas and conflicting stakeholder values or by emphasising authenticity and engagement as critical drivers of loyalty in the digital era (e.g., van Riemsdijk et al., 2017; Keller, 2020). Scholars have also emphasised stakeholder orientation and value co-creation, where brands emerge through collaborative processes involving multiple actors rather than unilateral managerial decisions (Iglesias & Ind, 2020; Ranjan & Read, 2016).

More recently, digital and data-driven approaches have begun to reshape the way BP is studied. Computational methods, such as semantic network analysis (Cancellieri et al., 2023) and dynamic brand-topic modelling of user reviews (Zhao et al., 2023), enable researchers and practitioners to trace associations, sentiment, and positioning outcomes in real-time. These developments highlight the evolution of BP theory, yet they also expose a persistent challenge. However, despite its critical importance, BP remains theoretically fragmented and practically inconsistent. There is still no universally accepted framework for constructing, classifying, or systematically applying positioning strategies. Although numerous approaches to BP exist, they are **fragmented, focusing either on marketing communication, consumer perception, or identity**. Few models provide a holistic, empirically validated framework that integrates internal, external, strategic, and outcome-oriented dimensions, particularly in the context of sustainable business performance. Existing approaches often lack clarity regarding their complementarity, internal logic, or alignment with organisational objectives, complicating their application in real business settings. Furthermore, it remains unclear which specific positioning

activities and components most effectively contribute to strategic brand building and sustainable performance.

This Doctoral Thesis addresses the conceptual and practical gap by investigating brand positioning (BP) not merely as a marketing communication construct but as a strategic and integrative process linking brand logic, organisational capabilities, and stakeholder value.

**The research aims to** conceptualise and empirically validate BP as a strategic approach to sustainable business development by developing a holistic framework that links BP to OP, SM, and sustainability.

**Research objectives.** To achieve this aim, the following research objectives are set:

1. Analyse the theoretical foundations and conceptual development of BP in the context of sustainable business development.
2. Identify and synthesise key positioning elements, models, and strategic approaches through qualitative content analysis.
3. Develop the theoretical brand positioning conceptual model (TBPCM) as a transitional step towards validation.
4. Examine interactions between BP, customer decision-making, stakeholder engagement, and brand loyalty.
5. Formulate and test hypotheses linking BP with OP and OS, including the mediating role of SM.
6. Validate and refine the model through expert engagement, resulting in the holistic brand positioning model (HBPM).
7. Demonstrate the model's applicability through practical case testing (*Joy for Tails*).

**The subject of the research** is BP as a strategic approach.

**The object of the research** is sustainable business development.

**The research question:** How does BP contribute to OP and OS in the context of sustainable business development, and how does this effect depend on its integration into SM?

The following **hypotheses** are proposed.

**H1.** OP → OS – higher organisational performance is associated with higher levels of sustainability.

**H2a.** BP → OP – strong brand positioning is associated with higher organisational performance.

**H2b.** BP → OS – strong brand positioning is associated with higher organisational sustainability.

**H3a.** BP → SM → OP – the effect of BP on OP depends on its integration into strategic management.

**H3b.** BP → SM → OS – the effect of BP on OS depends on its integration into strategic management.

**Theoretical foundation of Doctoral Thesis.** The theoretical background of this Doctoral Thesis is grounded in academic literature across the fields of BP, strategic brand management, consumer behaviour, stakeholder theory, and sustainable business development.

Core theoretical contributions include: Ries & Trout (1981) – classical positioning theory; Aaker (1996, 2012) – brand identity and strategic model building; Keller (2001, 2003) – customer-based brand equity (CBBE); Kapferer (2012) – brand architecture and brand meaning systems; Urde (1999, 2003) – brand orientation and internal-external alignment; Kotler et al. (2010, 2017) – stakeholder-focused and value-driven marketing; Lüdicke (2015) – marketing theory from “of / in / with” perspectives; Schiffman & Kanuk (2000) – consumer decision-making and behavioural processes.

**Methodological foundation of Doctoral Thesis.** Based on this theoretical foundation, the research applies a triangulated inductive methodology, structured into three sequential and interrelated phases.

1. In the theoretical phase, a systematic literature review and qualitative content analysis are conducted to extract key definitions, models, and conceptual elements related to BP. A total of 31 definitions and 56 theoretical sources are analysed. Inductive synthesis and grouping of positioning elements lead to the construction of a conceptual model for validation, which consolidates the strategic, emotional, symbolic, and stakeholder-oriented dimensions of BP.
2. The analytical phase includes further refinement of the element structure, development of thematic taxonomies, and mapping of conceptual relationships between elements. Strategic positioning approaches are compared, and several conceptual models are developed, including the decision-making interaction model, the stakeholder interaction model, and the brand-customer touchpoint framework.

The Analytical phase also involves formulating five hypotheses that link BP to Op, OS, and SM.

3. The empirical phase is designed to validate the developed model and to test the proposed hypotheses through expert engagement. This phase combines qualitative and quantitative methods. Focus group discussions and in-depth interviews with senior executives from multiple industries were used to evaluate model dimensions and assess the strategic integration of BP into organisational management. Participants provided detailed insights on how BP contributes to OP and OS, reinforcing the model’s conceptual structure.

In addition, a structured survey of business owners and senior executives was conducted to empirically test the hypotheses linking BP, OP, OS, and SM. The survey data were analysed using Pearson correlation and hierarchical cluster analysis, providing statistical confirmation of the hypothesised relationships. The results demonstrated that BP significantly influences both OP and OS, and that its effect is amplified when embedded into SM processes.

The outcome of this triangulated validation was the refinement and approval of the HBPM. The HBPM integrates internal brand architecture, external influences, stakeholder alignment, and SM into a single comprehensive framework. It is theoretically grounded, empirically validated, and practically applicable, as illustrated by its implementation in the *Joy for Tails* case. In addition, the research confirmed the validated model of interaction between BP, SM, OP, and OS, empirically demonstrating that BP significantly influences both OP and OS, and that its effect is amplified when embedded

into SM processes. This comprehensive methodological framework ensures theoretical consistency, conceptual clarity, and practical relevance. It enables the development of a BP model that is grounded not only in academic theory but also strategically applicable to sustainable business development.

During the development of this doctoral thesis, artificial intelligence (AI) tools – Manus (Manus.im) and ChatGPT (OpenAI) – were used for linguistic refinement, text structuring, and the preparation of selected visualisations. The suggestions provided by the mentioned tools and the generated visual materials were critically evaluated, adapted, and validated in accordance with the author's academic requirements. The intellectual content, analytical approach, conclusions, and interpretation of this work remain entirely the responsibility of the author.

**Scientific methods.** The methodological structure of the Doctoral Thesis is organised across three interconnected chapters, each applying distinct but complementary scientific methods. The first chapter establishes the theoretical framework through a systematic literature review aimed at identifying theoretical approaches, definitions, elements, and models related to BP. To refine the conceptual basis, a qualitative content analysis was conducted, focusing on 31 definitions of BP and 56 theoretical sources. The insights derived from this process were synthesised inductively, allowing for the structuring and extraction of key BP models for subsequent validation.

The second chapter turns to analytical modelling and conceptual integration. Within this stage, a comparative analysis was employed to evaluate and contrast existing theoretical models and strategic approaches to BP. The process continued with conceptual modelling, which resulted in the development of several new frameworks, including the brand–customer interaction model, the decision-making model, and the brand touchpoint framework. In addition, a classification exercise was undertaken to categorise existing positioning models into three distinct types: holistic, process-based, and component-based. This categorisation provided a structured overview of the field and laid the groundwork for further conceptual refinement.

The third chapter focuses on empirical research and model validation, employing a combination of qualitative and quantitative methods. The qualitative phase consisted of focus group discussions with 16 participants, designed to explore the integration of BP into SM, as well as semi-structured expert interviews with 13 professionals, which provided critical insights for testing the model structure. The open-ended responses from these interviews were analysed using that combined inductive and deductive techniques.

The quantitative phase built on these results through a structured survey conducted among 14 company owners and top executives, who evaluated the proposed hypotheses using a Likert-type scale. To ensure comparability across different measurement formats, data normalisation was applied. The analysis advanced through several statistical techniques: Pearson correlation analysis was employed to explore relationships between twenty-five BP elements (BPE) and to examine correlations between constructs such as BP, OP, OS, and SM. Hierarchical cluster analysis was subsequently used to evaluate positioning profiles across companies. Finally, heatmaps and visualisation methods were introduced to present data both by company and by dimensions emerging from the interviews, as well as to illustrate survey results in a clear and accessible way.

**Scientific contribution and novelty of the Doctoral Thesis.** This Doctoral Thesis advances both theoretical understanding and managerial practice of BP in the context of sustainable business development. The central novelty lies in the development and empirical validation of the HBPM. Unlike previous fragmented approaches, the validated HBPM positions BP as a strategic resource embedded within SM and directly linked to OP and OS. The empirical confirmation of the proposed hypotheses reinforces this strategic role, showing that BP influences both OP, and OS, and that its effect is amplified when integrated into SM.

The contributions of the Doctoral Thesis extend across three levels: conceptual synthesis, methodological innovation, and empirical validation. Together, they establish BP as a systemic mechanism for sustainable business development. The scientific novelty is reflected in six interrelated outcomes:

1. The model of human decision-making and its interaction with BP – showing how brand perception influences decisions through experience-based, value-filtered processes.
2. Conceptual model of brand-customer interaction and loyalty formation – a stakeholder-oriented framework illustrating how BP creates loyalty through symbolic alignment, emotional connection, and trust-building.
3. Model of brand-customer touchpoints – a conceptual map showing how positioning elements activate across consumer journey stages, contributing to brand image formation.
4. Conceptual model TBPCM – a theory-driven model integrating elements identified through qualitative content analysis of definitions, models, and theories.
5. The validated HBPM – the author’s developed holistic model, that embeds BP within SM and sustainability logic.
6. Validated model of interaction between BP, SM, OP, and OS – empirically demonstrating that BP has a significant effect on organisational outcomes and that this effect is strengthened through strategic integration.

These contributions provide a novel and comprehensive framework for understanding BP not only as a communicative function but as a strategic construct capable of driving OP, stakeholder trust, and long-term sustainability. Unlike prior studies that examined isolated effects such as the impact of brand equity on financial performance (e.g., Aaker, 1996; Keller, 2001; Knox, 2004) or the role of stakeholder orientation in sustainability (e.g., Urde, 2003; Kotler et al., 2010; Kotler et al., 2017), this Doctoral Thesis conceptualises and empirically validates BP as an integrated construct, offering both theoretical advancement and practical managerial relevance.

**Practical contributions.** This Thesis offers practical contributions for academic researchers, higher education institutions, business leaders, consultants, and policymakers. The holistic model, developed and validated in this research, provides a practical framework for analysing BP, embedding it into SM, and linking it to OP and OS. Its applicability is demonstrated by the *Joy for Tails* case, illustrating how the model can guide brand creation, export readiness, and long-term strategic growth.

In practice, the model provides a basis for diverse stakeholders, including businesses, academia, and policymakers, to:

- align the set of BPE identified in the HBPM with market dynamics, ensuring coherence and adaptability over time (e.g., brand identity, mission, and culture as part of the broader framework);
- apply BP as a governance mechanism, supporting top management in making consistent, long-term strategic decisions supporting sustainable business development;
- use the model as a reference framework for business and policy initiatives, strengthening competitiveness and innovation capacity beyond the level of individual companies;
- promote the integration of a holistic approach to BP into marketing and business management education, thereby preparing future professionals to apply positioning as a strategic mechanism rather than a narrow promotional tool.

### **Defence arguments**

- BP is not a narrow marketing tool but a strategic and holistic construct that integrates internal brand architecture, stakeholder alignment, and external influences. Empirical results confirm that this approach enhances both OP and OS, with its impact amplified when embedded in SM processes.
- The Doctoral Thesis presents a novel, holistic model that provides a multidimensional, empirically validated framework, linking positioning with performance, sustainability, and SM. This model also addresses long-standing fragmentation in BP theory by consolidating internal, external, strategic, and outcome-oriented dimensions into a coherent system.
- The HBPM proves to be a practical and strategic tool, as demonstrated in the *Joy for Tails* case study, supporting brand creation, export readiness, and sustainable growth in international markets.

**Logic and design of the research.** The research is built on a sequential, multi-phase structure that combines theoretical synthesis with empirical validation. This approach enables the development of a robust BP framework grounded in theory and tested in practice.

As noted by Paul and Criado (2020), structured literature reviews allow researchers to synthesise existing knowledge, identify conceptual boundaries, and uncover theoretical gaps. Xiao and Watson (2019) also emphasise that systematic analysis provides a foundation for hypothesis development and model construction.



| THEORETICAL AND ANALYTICAL STUDY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                       | EMPIRICAL STUDY                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                    |                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1. Systematic Literature Overview                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 2. Qualitative content analysis & interpretation                                                                                                                                                                                                                                                                                                      | 3. Conceptualisation                                                                                                                                          | 4. Validation for the initial theoretical model                                                                                                                                                                                                                                                                                           | 5. Practical brand implementation                                                                                                                                                                                                  | 6. Approved HBPM                                                                     |
| <b>The theoretical framework of BP:</b> <ul style="list-style-type: none"> <li>Historical development;</li> <li>BP concept review, BP definitions;</li> <li>The types of BP strategies;</li> <li>Models of BP and branding;</li> </ul> <b>The importance of BP strategy:</b> <ul style="list-style-type: none"> <li>Factors affecting sustainable BD;</li> <li>Factors that contribute to brand economic viability and long-term growth;</li> <li>The impact of BP on OP and OS;</li> <li>Integrating BP into SM;</li> <li>Successful BP.</li> </ul> | <ul style="list-style-type: none"> <li>Elements of BP definitions;</li> <li>Theoretical aspects of brand positioning by the “Theory of marketing”</li> <li>Analysis of BP approaches</li> <li>Unique attributes of models</li> <li>BPE relevance to the business objects (market, brand, and stakeholders)</li> <li>Hypothesis development</li> </ul> | <ul style="list-style-type: none"> <li>Model of brand interactions with stakeholders</li> <li>Development of a new Theoretical BP Conceptual Model</li> </ul> | <ul style="list-style-type: none"> <li>Focus group of experts - evaluation of the developed model.</li> <li>Improvement of theoretical model – development of HBPM Framework (Advanced Model).</li> <li>Management-level expert in-depth interviews for the approval of the HBPM</li> <li>Strategic integration analysis of BP</li> </ul> | <ul style="list-style-type: none"> <li>New “Joy for Tails” brand development and implementation according to HBPM.</li> <li>New model for the brand and customer touchpoints in the context of brand image development.</li> </ul> | <ul style="list-style-type: none"> <li>Approval of the HBPM, description.</li> </ul> |
| <b>RESULT:</b><br>synthesis of findings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>RESULT:</b><br>contextualization;<br>identification of patterns                                                                                                                                                                                                                                                                                    | <b>RESULT:</b><br>New conceptual models                                                                                                                       | <b>RESULT:</b><br>Validation of BP models                                                                                                                                                                                                                                                                                                 | <b>RESULT:</b><br>New brand                                                                                                                                                                                                        | <b>RESULT:</b><br>Approved Holistic Brand Positioning Model                          |

Fig. 1. Logic and design of the research process (author’s developed framework).

In line with these principles, the research is divided into two main components: the theoretical and analytical study and the empirical study, as illustrated in Fig. 1.

**Theoretical and analytical study.** The first stage includes a systematic literature review to identify foundational concepts and trends in BP and its link to sustainable business development. This is followed by a qualitative content analysis of definitions, theories, and models to extract key elements and positioning dimensions.

The insights derived from these analyses inform the development of the TBPCM. This structured conceptual framework integrates internal, external, and stakeholder-oriented BP components.

**Empirical study.** The TBPCM is further validated and refined through empirical research. This includes expert focus group discussions and in-depth interviews with brand and strategy professionals to assess the model’s applicability and completeness.

Based on expert input, the model has evolved into the HBPM, which incorporates stakeholder dynamics, decision-making interactions, and SM integration.

Additionally, a practical application of the HBPM is demonstrated using the *Joy for Tails* brand, serving as a test case for implementing and adapting the model in a real business context.

As part of the validation process, an additional model is developed to represent brand-customer touchpoints in brand image formation, further illustrating how positioning logic operates across the brand experience journey.

**Limitations of the research.** Although this Doctoral Thesis contributes to both theoretical development and managerial understanding of BP in the context of sustainable business development, several limitations must be acknowledged:

1. Scope of sustainability. The study focuses primarily on the economic dimension of sustainability, analysing how BP contributes to OP and long-term viability. Social and environmental dimensions, while highly relevant in the broader sustainability discourse, were not included in the scope of this research. Consequently, the conclusions are most applicable from an economic perspective, although the model may also hold potential for wider applications.
2. Geographical scope. The empirical validation was conducted in the Latvian and Baltic context. While this provides a strong regional perspective, differences across international markets and cultural environments were not systematically examined. Most of the participants represented export-oriented companies, which partially mitigates this limitation by incorporating global perspectives; however, full cross-country validation would strengthen the generalisability of the findings.
3. Sample size and method. A total of 43 organisational representatives participated in the triangulated empirical validation: 16 marketers and brand strategists in focus group discussions, 13 purposively selected senior managers and founders from different industries within in-depth interviews, and 14 company owners and top executives within a survey to test and refine the conceptual BP model, as well as to confirm the proposed hypotheses. However, a broader respondent base could provide even greater precision and allow for statistical generalisation.
4. Customer perspective. The empirical research reflects managerial and expert views; direct consumer perspectives were not included and could be incorporated in future studies. Incorporating consumer views would allow a more comprehensive assessment of positioning effectiveness and outcome validity.
5. Practical application. The developed BP model (HBPM) and holistic approach were applied in the development of an illustrative case study (*Joy for Tails*), which illustrates the practical relevance of the model and its usability in guiding brand creation, export readiness, and values-based innovation. Nevertheless, validation through additional case applications across different industries and market contexts would further strengthen the external validity of the model.

**Approbation and practical application of the research results.** The research was conducted from 2018 to 2024, and the results of the Doctoral Thesis have been approved through participation in international and local scientific conferences, academic seminars, professional discussions, and used in the implementation of projects, participating in eight projects.

1. The practical application of the research was validated and demonstrated in the European Union co-financed project on innovation development, where the *Joy for Tails* brand and product line were developed and introduced to export markets in line with the strategic principles of BP validated in this thesis (project “Development of New Products – Ice Cream for Pets”, implemented under the Research Project No.

5.1.1.2.i.0/1/22/A/CFLA/003 (8)). Author's participation in the project: project manager and researcher.

2. Although the practical applications are not presented in detail, the research progress, theoretical insights, and results obtained between 2018 and 2024 have been applied in the development of various new products, particularly through the analysis of their positioning and alignment with the brand. These developments were carried out within seven research projects, all of which were led and conducted by the author in her dual role as project leader and researcher. The projects were implemented in collaboration with research institutions, including Riga Technical University, the Latvia University of Life Sciences and Technologies, the University of Latvia, and the Institute of Agricultural Resources and Economics, as well as representatives from industry.
  - 03/2024–09/2024, Tērvete Food Ltd. project “Development of new products – ice cream creams”. Project aim: Research into new products and technologies in the cream segment. Research outcome: Development of a production technology for ice cream creams. Project No. 5.1.1.2.1.0/1/22/A/CFLA/003 (31), research under the agreement between Latvian Food Sector Competence Centre (LFSCC) and the Central Finance and Contracting Agency (CFCA).
  - 03/2023–12/2024, Tērvete Food Ltd. project “Development of new products – ice cream for pets”. Project aim: Development of new products for dogs in the pet supplementary feed segment. Research outcome: Commercialisation of three innovative products with functional properties. Project No. 5.1.1.2.i.0/1/22/A/CFLA/003 (8), research under the agreement between LFSCC and the CFCA. Beyond the publications directly addressing the Doctoral Thesis, two additional scientific articles have been published on product development.
  - 11/2020–01/2022, MILZU! Ltd. project “Research on product recipes and production technologies for the introduction of MILZU! products in the beverage and cream segment”. Project aim: Development of new pea-based products (beverages and meals). Research outcome: Development of three beverage recipes; commercialisation of seven new vegan products made from Latvian grey peas, including innovative products. Project No. 1.2.1.1/18/A/002 (45), research under the agreement between LFSCC and the CFCA.
  - 07/2020–01/2022, MILZU! Ltd. project “Research on the processing and scaling of microorganisms for the production of biopolymers”. Project aim: Adaptation of processes for scaling and production to create a biodegradable material of higher value in collaboration with the RTU and University of Latvia. Research outcome: Development of a new biodegradable material as a plastic alternative, including for food packaging production. Project No. 1.2.1.1/18/A/002 (41), research under the agreement between LFSCC and the CFCA. Beyond the publications directly addressing the subject of the Doctoral Thesis, three additional scientific articles have been published on product development.
  - 02/2020–12/2021, MILZU! Ltd. cross-sectoral project “Knowledge transfer and development of new cereal products”. Project aim: Development of new high-value

products using cereals grown in Latvia and other plant-based additives in collaboration with the Institute of Agricultural Resources and Economics. Research outcome: Commercialisation of four new products, including innovative products. Project No. 19-00-A01620-000068, research carried out as part of the activities of the Rural Support Service. Beyond the publications directly addressing the subject of the Doctoral Thesis, three additional scientific articles have been published on product development.

- 10/2016–01/2019, MILZU! Ltd. project “Research on new recipes for MILZU! cereal products”. Project aim: Development of healthy alternative products – extruded cereal flakes – in collaboration with the Latvia University of Life Sciences and Technologies. Research outcome: Commercialisation of 19 new products, including innovative products. Project No. 1.2.1.1/16/A/004.05, research under the agreement between LFSCC and the CFCA.
- 10/2016–01/2019, MILZU! Ltd. project “Research and development of a cereal flakes packaging-based ecosystem of children’s toys to increase the added value of food products”. Project aim: Development of an educational construction set in collaboration with RTU. Research outcome: Creation of a concept for the construction set. Project No. 1.2.1.1/16/A/004.04, research under the agreement between LFSCC and the CFCA.

The author has applied the theoretical insights from the Doctoral Thesis in practical work, directing the business development and export of two companies during the research, as well as managing a manufacturing company. This involved introducing innovative products and new brands, resulting in the development of a new comprehensive BP approach.

The results of the Doctoral Thesis have been used in the study course “Strategic Marketing”.

**Scientific publications.** The progress and outcomes of the Doctoral Thesis have been disseminated through 11 scientific publications, including eight articles published in conference proceedings indexed in Scopus.

1. Strausa, E., Gaile-Sarkane, E. “Embedding Brand Positioning within Strategic Management”. The 28th World Multi-Conference on Systemics, Cybernetics and Informatics: Proceedings International Institute of Informatics and Systemics, USA, 2024, pp. 124–131. (Indexed in Scopus).
2. Strausa, E., Ence, E., Gaile-Sarkane, E. “Positioning as a Catalyst Towards Innovations”. The 27th World Multi-Conference on Systemics, Cybernetics and Informatics: Proceedings Vol. 1, International Institute of Informatics and Systemics, USA, 2023, pp. 196–202. (Indexed in Scopus).
3. Strausa, E., Gaile-Sarkane, E. “Analysis of Brand Positioning and Branding for the Development of New Brand Positioning Model”. The 26th World Multi-Conference on Systemics, Cybernetics and Informatics: Proceedings Vol. 2, International Institute of Informatics and Systemics, USA, 2022, pp. 142–147. (Indexed in Scopus).
4. Strausa, E., Ence, E., Gaile-Sarkane, E. “Values Based Innovation – New Strategic Approach”. The 26th World Multi-Conference on Systemics, Cybernetics and

Informatics: Proceedings Vol. 2, International Institute of Informatics and Systemics, USA, 2022, pp. 136–141. (Indexed in Scopus).

5. Ence, E., Strausa E., Gaile-Sarkane, E. “Values Based Positioning – the Key to Success in Development of a Brand”. The 25th World Multi-Conference on Systemics, Cybernetics and Informatics: Proceedings Vol. 3, International Institute of Informatics and Systemics, USA, 2021, pp. 117–122. (Indexed in Scopus).
6. Ence, E., Strausa, E., Gaile-Sarkane, E. “Taxonomy of Value Development – How to Classify Values for Application in Business?”. The 24th World Multi-Conference on Systemics, Cybernetics and Informatics: Proceedings Vol. 3, International Institute of Informatics and Systemics, USA, 2020, pp. 54–58. (Indexed in Scopus).
7. Strausa, E., Ence, E. “Insight into Values in the Context of Brand Positioning”. Riga Technical University 61st International Scientific Conference on Economics and Entrepreneurship: Proceedings, RTU Press, 2020.
8. Ence, E., Strausa, E. “Analysis of Values and Interest of Stakeholders: Case of MILZU!”. The 10th International Multi-Conference on Complexity, Informatics and Cybernetics: Proceedings Vol. 1, International Institute of Informatics and Systemics, USA, 2019, pp. 13–17. (Indexed in Scopus).
9. Ozolins, M., Gaile-Sarkane, E., Ence, E., Strausa, E. “Entrepreneurship and Innovation Development at Higher Education Institutions: Opportunities and Solutions”. The 10th International Multi-Conference on Complexity, Informatics and Cybernetics: Proceedings Vol. 1, International Institute of Informatics and Systemics, USA, 2019, pp. 24–28. (Indexed in Scopus).
10. Strausa, E. “Elements Included in Brand Positioning”. Riga Technical University 60th International Scientific Conference on Economics and Entrepreneurship: Proceedings, RTU Press, 2019, pp. 56–56.
11. Ence, E., Strausa, E. “Research on Product Value Added based on Values and Interests of Stakeholders: Case of MILZU!”. Riga Technical University 60th International Scientific Conference on Economics and Entrepreneurship: Proceedings, RTU Press, 2018, pp. 23–30.

Data validation was achieved by presenting the research progress and results at nine **international and local conferences** (in Latvia, the USA, and South Korea).

1. The 28th World Multi-Conference on Systemics, Cybernetics and Informatics (WMSCI 2024), academic report: “Embedding Brand Positioning within Strategic Management”, September 10–13, 2024, Orlando, USA.
2. The 27th World Multi-Conference on Systemics, Cybernetics and Informatics (WMSCI 2023), academic report: “Positioning as a Catalyst Towards Innovations”, September 12–15, 2023, Orlando, USA.
3. The 26th World Multi-Conference on Systemics, Cybernetics and Informatics (WMSCI 2022), July 12–15, 2022, Orlando, USA:  
Academic report No. 1: “Values Based Positioning – the Key to Success in Development of a Brand”;

Academic report No. 2: “Analysis of Brand Positioning and Branding for the Development of New Brand Positioning Model”.

4. SOI & Riga Technical University 2021 Conference, academic report: “Values-Based Innovation – New Strategic Approach”, July 12–15, 2021, South Korea.
5. Riga Technical University 61st International Scientific Conference "Scientific Conference on Economics and Entrepreneurship" (SCEE 2020), academic report: “Insight into Values in the Context of Brand Positioning”, October 16, 2020, Riga, Latvia.
6. The 24th World Multi-Conference on Systemics, Cybernetics and Informatics (WMSCI 2020), academic report: “Taxonomy of Value Development – How to Apply it in Business Development?” September 13–16, 2020, Orlando, USA.
7. The 10th International Multi-Conference on Complexity, Informatics and Cybernetics (IMCIC 2019), Orlando, Florida, USA, March 13–15, 2019:  
Academic report No. 1: “Entrepreneurship and Innovation Development at Higher Education Institutions: Opportunities and Solutions”;  
Academic report No. 2: “Analysis of Values and Interests of Stakeholders: Case of MILZU!”.
8. Riga Technical University 60th International Scientific Conference "Scientific Conference on Economics and Entrepreneurship" (SCEE 2019), academic report: “Elements Included in Brand Positioning. In: Scientific Conference on Economics and Entrepreneurship”, October 11, 2019, Riga, Latvia.
9. Riga Technical University 59th International Scientific Conference "Scientific Conference on Economics and Entrepreneurship" (SCEE 2018), academic report: “Research on Product Value Added based on Values and Interests of Stakeholders: Case of MILZU!”, October 18, 2018, Riga, Latvia.

**Scope and Structure.** The Doctoral Thesis consists of an introduction, three parts, conclusions, recommendations, and a bibliography with 275 references. The total length is 209 pages, including 34 figures, 30 tables, one formula, and 16 appendices.

The Doctoral Thesis is structured into three parts, reflecting the logical progression from theoretical analysis to model development to empirical validation.

**Chapter 1** explores the conceptual and historical evolution of BP and synthesises key theoretical insights. A qualitative content analysis of definitions, theories, and models is conducted to identify recurring elements and dimensions and to highlight the strategic importance of BP in business development.

**Chapter 2** builds on these foundations by examining the elements of BP and its role in customer decision-making and stakeholder interaction. A conceptual model of brand loyalty is constructed to illustrate the link between positioning and performance. In this chapter, the author also formulates hypotheses connecting BP with organisational outcomes (OP and OS) and SM.

**Chapter 3** presents the empirical validation of the developed BP model (TBPCM) through focus group discussions, expert interviews, and a structured Likert-scale survey. The survey

data, collected from company owners and top executives, provide quantitative evidence of the relationships among BP, OP, OS, and SM, thereby testing and validating the proposed hypotheses. Based on these findings, the TBPCM is refined into a validated model (HBPM), which integrates internal brand architecture and external influences. Its practical applicability is demonstrated through the *Joy for Tails* case study. By employing a triangulated approach, the research extends the concept of BP, demonstrating its role not merely as a marketing function but as a strategic mechanism for sustainable business development.

# 1. THE THEORETICAL BACKGROUND

This chapter provides the theoretical foundation for the Doctoral Thesis. It reviews the evolution of BP as a concept, synthesises its main definitions, and examines different models and approaches developed in academic literature. The aim is to establish a comprehensive understanding of how BP has been conceptualised, analysed, and applied, and to identify the gaps and limitations that the Doctoral Thesis seeks to address.

## 1.1. The theoretical framework of brand positioning

In today's over-communicated and product-saturated consumer world, effective positioning is a critical determinant of brand success (Marsden, 2002). As consumers encounter an abundance of brand messages and product choices, the need to establish a clear, differentiated, and strategically consistent brand position becomes paramount (Fuchs & Diamantopoulos, 2010; Pham & Muthukrishnan, 2002; Punj & Moon, 2002).

Although the concept of positioning is widely used in marketing and business literature, its meaning remains ambiguous. Bainsfair (1990) observed that positioning is "one of those words that everyone uses but few people understand." This observation remains valid, as inconsistent definitions and limited integrative frameworks continue to fragment both academic and practical applications.

Given this complexity, this chapter explores the theoretical foundations of BP. It approaches positioning not merely as a marketing communication tool, but as a strategic and multidimensional construct that integrates brand identity, customer perception, strategic objectives, and long-term outcomes. A systematic literature review has been conducted, guided by a narrative and integrative approach as recommended by Snyder (2019), to synthesize key theoretical contributions and identify dominant elements and conceptual gaps.

The chapter begins by outlining the historical evolution of the positioning concept and continues with a review of major definitions, models, and strategic approaches. It concludes with a critical reflection on theoretical limitations that justify the need for a more holistic and integrated BP model.

### 1.1.1. Historical development of brand positioning

The development of **innovation, globalisation, and digitalisation** has a significant influence on the environment, driving rapid competition development and underscoring the importance of effective BP.

In the mid-twentieth century, human and environmental factors became useful for explaining market actor behaviour in addition to economic ones. The freedom of choice for entrepreneurs regarding a range of options, such as selecting a particular marketing strategy or innovation, implies a different level of value for these options (Murphy et al., 2006). According to Bruland (2003), the development of innovation and technology introduced a new direction in economic growth, which is also related to changes in marketing concepts. And according to Godin (2008), innovation developed its current understanding of representations, and this occurred when the literature on innovation expanded (around 1970-1990).



The history of globalisation has been studied extensively, for example, by the National Bureau of Economic Research, and the evidence supports the view that there was a significant expansion of globalisation in the 19th century (O'Rourke & Williamson, 2000). The mentioned study outlines the second great globalisation boom between 1950 and 2000, which resonates with the development of innovation. Globalisation often enables consistent growth that aligns with strategy, thereby opening larger markets for a focused approach. Unlike broadening domestically, expanding globally is likely to leverage and reinforce a company's unique position and identity (Porter, 1996). Likewise, the potential of information and communication technologies was made clear in the 1990s (Sasvari, 2010; Simurina & Jica, 2006). It created a platform not only for digital entrepreneurship but also for an unprecedented form of communication and interaction of brands with society (Kollmann, 2022). The early 21st century marked a rapid transition from the classic industrial production model to a digital or information-based society (Brenner, 2014; Musik & Bogner, 2019). This transformation has fundamentally changed how companies operate and interact with customers (Ritter & Pedersen, 2020; Giraldo-Luque & Fernández-Rovira, 2020; Cagle et al., 2020). Changes in technology and consumer behaviour are key factors in transforming media strategies, as previously used communication methods are evolving into "digital relationships" with customers (Kung, 2008; Kannan & Li, 2017).

Aspects of innovation, globalisation, and the development of information and communication technology are rapidly entering everyday life, compelling more and more entrepreneurs to consider the opinions of their target audience, as well as the impact of information technology, to drive competitiveness.

The issues of national **competitive advantage** and the competitiveness of locations became essential topics in economics and business fields after 1980 (Aiginger, 2006). Until then, the economic approach was reflected in a relatively simplified approach; the value proposition to the customer, the architecture of revenues and costs, or mechanisms to capture value were not so focused. Purchases are assumed to occur if the price is less than the utility yielded; producers will supply if the price is at or above all costs, including a return on capital. The price system resolves everything, and business design issues don't arise. However, Porter suggested that the benefits of either scale or differentiation could serve as profit drivers in the 1980s, based on his studies on competitiveness (Porter, 1980, 1985, 1990). Subsequently, several scientists and authors have studied the aspects of competitiveness and competitive advantage, studying an increasingly broader context (Barney, 1991; Manuel & Alcuaz, 1996; Ma, 1999; Wheelen & Hunger, 2004).

Knox and Bickerton (2003) argue that the concept of BP, as it is now understood, first appeared in the brand management literature as the concept of brand image, which was studied by Boulding in 1956. Features of the idea of positioning can also be observed in the sixties, when Alpert and Gatty (1969) identified positioning as the differentiation of brands depending on consumer perception. In their seminal article *Product positioning by psychological attributes*, they described positioning as a process of differentiating brands based on consumers' psychological perceptions (Alpert and Gatty, 1969). Their work emphasised that consumer evaluation of product attributes plays a crucial role in how brands are positioned in the

customer's mind, laying the foundation for later strategic models of BP. The term “brand positioning” has gained increased recognition since Ries and Trout’s seminal work in 1981. In the early 1980s, Ries and Trout popularized the concept of BP, which suggests that a brand's position should differentiate it from competitors (Ries & Trout, 1981). BP delivers a point of superiority that gives a competitive advantage (Aaker, 1996).

In conditions of high competition, brands need to get a precise and unique position in the market; they must be able to present themselves perceptibly and effectively within a particular market segment or prospect (Zineldin, 2002) – first get the attention of the target audience to earn loyalty.

The evolution of entrepreneurial thought over time (see Fig. 1.1), among other things, contextualises the evolution of BP. The author outlines the development of innovation, globalisation, and digitalisation in the context of history as a background for the creation of the concept of BP.

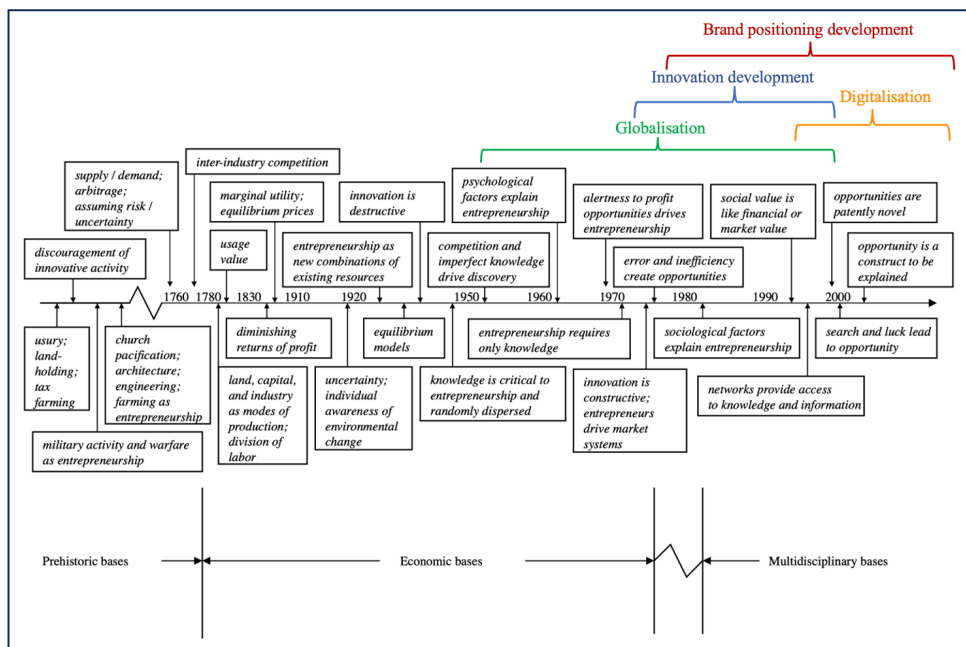


Fig. 1.1. The overview of the conceptual history of entrepreneurial thought in brand positioning context (source Murphy et al., 2006, adapted by the author).

Later in the 2000s, advances in neuroscience and the rise of neuromarketing research shed light on the neural processes underlying consumer emotions and decision-making. Marketers began leveraging insights from neuroscience to design emotionally resonant campaigns (Ariely, 2010). The advent of digital and social media platforms provided new avenues for brands to engage with consumers on an emotional level. Interactive content, storytelling, and user-generated content have become integral to emotional marketing strategies (Kaplan & Haenlein, 2010). In 2016, Kotler expanded the previously developed conceptual 4-step model of branding

to include two new elements: "brand trust" and "brand benefit" (Kotler, 2016). During this period, emotional marketing also became relevant.

After tracing the historical development of BP, which has been shaped by the forces of innovation, globalisation, and digitalisation, these transformative trends have had a profound influence on the evolution of marketing strategies. From the early days of advertising to the contemporary era of digital marketing, the landscape of BP has continually adapted to the changing dynamics of consumer behaviour and technological advancements.

The historical development of BP analysis demonstrates that the emergence of innovation, globalisation, and digital technologies has profoundly influenced not only markets but also the underlying logic behind brand differentiation and consumer engagement. Over time, BP has evolved from a promotional tactic to a strategic necessity. These developments have laid the groundwork for reinterpreting the essence of positioning in today's context. The following section therefore explores how positioning has been defined and conceptualised in the academic literature, providing a foundation for a more integrated theoretical understanding.

### 1.1.2. Brand positioning concept review

Positioning is one of the most complex concepts in marketing (Bhat & Reddy, 1998), and there is no consensus among marketing scholars and practitioners regarding the exact meaning of this concept (Aaker & Shansby, 1982; Crawford, 1985; Mühlbacher et al., 1993; Rigger, 1995). As highlighted by Blankson and Kalafatis (1999), "there has been no single universally accepted definition of the concept of positioning". The boundaries of the concept are often not clearly defined – the question of what exactly is included in the scope of positioning has not been sufficiently addressed in the literature. It remains subject to debate in the marketing community. According to Rigger (1995), the absence of a rigorous definition is inhibiting both practitioners and academic scholars from developing appropriate means of measuring the operationalisation of positioning.

**Overview of BP definitions.** While there is no single universally accepted definition of BP, numerous marketing scholars have offered distinct interpretations over time. Table 1.1 provides a comparative summary of these definitions, illustrating both the conceptual richness and fragmentation within the literature. This overview helps to identify the key recurring elements that later inform the development of a more integrated model.

Table 1.1

Overview of brand positioning definition (created by the author)

|   | Author | Year | Definition                                                                                                                                                                                                                                                                                                    |
|---|--------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Levy   | 1959 | By stressing the attributes of their products, marketers can move beyond the utilitarian values of the product and address consumer needs using behavioural concepts such as imagery, symbolic value and self-concept to create a desired representation of a service or product in the mind of the consumer. |

Table 1.1 (continued)

|    | Author              | Year | Definition                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----|---------------------|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2  | Ries, Trout         | 1981 | Positioning is a marketing method for creating the perception of product, brand or identity. Positioning is where your product image is placed in relation to image of your competitor products. BP is the sum of all activities that position the brand in the mind of the customer relative to its competition. Positioning is not about creating something new or different, but to manipulate the mind set and existing connections. |
| 3  | Day                 | 1981 | Product positioning refers to the customer's perceptions of the place a product or brand occupies in a given market.                                                                                                                                                                                                                                                                                                                     |
| 4  | Lodish              | 1986 | The process of trying to improve the perception of your product by a market segment.                                                                                                                                                                                                                                                                                                                                                     |
| 5  | Quelch              | 1991 | Positioning is a management concept of where a product or service should stand in the marketplace relative to competitive products and services.                                                                                                                                                                                                                                                                                         |
| 6  | Kapferer            | 1992 | Positioning is a process of emphasizing the brand's distinctive and motivating attributes in the light of competition. Positioning needs to result from brand identity. Only well-defined brand identity allows to precisely define BP.                                                                                                                                                                                                  |
| 7  | Myers               | 1996 | It [positioning] is what happens in a customer's mind, how customers view competing product entries.                                                                                                                                                                                                                                                                                                                                     |
| 8  | Perreault, McCarthy | 1996 | Positioning shows how customers locate proposed and/or present brands in a market.                                                                                                                                                                                                                                                                                                                                                       |
| 9  | Trout, Rivkin       | 1996 | Positioning is simply concentrating on an idea – or even a word – that defines the company in the minds of consumers.                                                                                                                                                                                                                                                                                                                    |
| 10 | Wilson, Gilligan    | 1997 | The process of designing an image and value so that the customer within the target segment understand what the company or brand stand for in relation to its competitors.                                                                                                                                                                                                                                                                |
| 11 | Antonides, Raaij    | 1998 | Positioning refers to the consumer's perception of a brand amongst other brands. Positioning mainly results from marketing communication regarding brands, social communication and personal experience.                                                                                                                                                                                                                                 |
| 12 | Ligas, Cotte        | 1999 | BP environments: 1) the marketing environment that positions the product with particular associations in the minds of consumer; 2) an individual's environment that adapts the brand to particular life situations and to his/her own self-image; 3) the social environment that facilitates communication through symbolism.                                                                                                            |
| 13 | Davis               | 2000 | Positioning is the place in consumers' minds that a brand wants to own. It has to be externally driven and relevant, it has to be differentiated from the competition and, most importantly, it has to be valued.                                                                                                                                                                                                                        |

Table 1.1 (continued)

|    | <b>Author</b>         | <b>Year</b> | <b>Definition</b>                                                                                                                                                                                                                                                                                    |
|----|-----------------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 14 | Jain                  | 2000        | Placing a brand in that part of the market where it will receive a favourable perception compared to competing products.                                                                                                                                                                             |
| 15 | Temporal              | 2002        | Positioning takes the basic tangible aspects of the product and builds the intangibles in the form of an image in people's minds.                                                                                                                                                                    |
| 16 | Keller                | 2003        | Positioning is all about identifying the optimal location of a brand and its competitors in the minds of consumers to maximize potential benefit to the firm.                                                                                                                                        |
| 17 | Kotler                | 2003        | Positioning is the act of designing the company's offering and image to occupy a distinctive place in the mind of the target market. The result of positioning is the successful creation of a customer-focused value proposition, a cogent reason why the target market should buy the product.     |
| 18 | Lilien,<br>Rangaswamy | 2003        | Positioning refers to the set of strategies that firms develop and implement to ensure that these differences occupy a distinct and important position in the minds of customers. Positioning is what you try to do to the minds of customers to help them perceive the product differences clearly. |
| 19 | Kapferer              | 2004        | Positioning a brand means emphasising the distinctive characteristics that make it different from its competitors and appealing to the public.                                                                                                                                                       |
| 20 | Winer                 | 2004        | Considering the alternative differentiation possibilities and determining what differential advantages are to be emphasised and communicated to the target customers.                                                                                                                                |
| 21 | Blythe                | 2005        | The grouping of similar product types together in the consumer's perceptual map.                                                                                                                                                                                                                     |
| 22 | Solomon et al.        | 2006        | Developing a marketing strategy aimed at influencing how a particular market segment perceives a good or service in comparison to competition.                                                                                                                                                       |
| 23 | Kerin et al.          | 2007        | Product positioning refers to the place an offering occupies in consumers' minds on important attributes relative to competitive offerings.                                                                                                                                                          |
| 24 | Schiffman,<br>Kanuk   | 2007        | Positioning conveys the meaning of a good or service in terms of how it fulfils needs of consumers.                                                                                                                                                                                                  |
| 25 | Porter                | 2008        | Performing different activities from rivals' or performing similar activities in different ways.                                                                                                                                                                                                     |
| 26 | Kapferer              | 2008        | Positioning concept relies on the application of Maslow's needs hierarchy and the notion that a need is never ever fully satisfied.                                                                                                                                                                  |

Table 1.1 (continued)

|    | Author           | Year | Definition                                                                                                                                                                                                                                                                                                                                                                                               |
|----|------------------|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 27 | Keller           | 2008 | BP clarifies what a brand is all about, how it is unique and how it is like competitors. The aim of BP is thus to explain why consumers should purchase and use a brand's products. The part of the brand identity and value proposition that is to be actively communicated to the target audience and that demonstrates an advantage over competing brands.                                            |
| 28 | Ellwood          | 2009 | BP refers to all its external activities, and, at the same time, it determines behaviour within an organisation.                                                                                                                                                                                                                                                                                         |
| 29 | Hooley et al.    | 2012 | Brand position is the act of deliberately specifying a brand's emphasis on particular attributes.                                                                                                                                                                                                                                                                                                        |
| 30 | Aaker            | 2012 | Positioning should be focused on the emotional and self-expressive benefits of a brand by introducing the brand as an organisation, a person and a symbol.                                                                                                                                                                                                                                               |
| 31 | Schiffman et al. | 2014 | When used effectively, positioning is a powerful tool that is more effective than the characteristics of the actual product itself. Positioning techniques are important to the success of a brand because consumers evaluate the relevance of brands by comparing them with the consistency of their self-image, purchasing brands that are congruent with this image and avoiding brands that are not. |

While the reviewed definitions vary in scope and terminology, several conceptual constants emerge – most notably, the emphasis on perception in the consumer's mind, differentiation relative to competitors, brand identity, and value alignment. These recurring elements highlight the multifaceted nature of BP and underscore its role as a dynamic interface between internal brand logic and external market realities. A more detailed qualitative content analysis of these 31 definitions is provided in Appendix 1. This analysis highlights the relative frequency of key conceptual components, forming an empirical basis for identifying the core dimensions of BP. These findings provide a theoretical foundation for further exploration of how positioning is implemented in models, strategies, and business practices.

**BP concept.** In the face of fierce competition and rapid digitisation, organisations are increasingly aware of and appreciate the importance of their brand in driving performance and sustainability, emphasizing the strengthening of competitive advantages as an essential part of SM. Hooley, Lynch, and Jobber (1992) argue that superior performance is linked to more distinct and generally high-quality positioning, and that both product positioning and company brand reputation are significantly related to firm performance. Marketing has changed dramatically – features of offerings have become less distinctive. Intangible factors gain importance, whereby the management of the brand image, manipulation of consumer perceptions, and positioning of the firm and its offerings in the marketplace become crucial (Ries & Trout, 1981; Hooley et al., 2005; Lindgreen et al., 2004).

Brands are often referred to as the most valuable asset for a company (Keller & Lehmann, 2003; Davis, 2000). Brands help consumers navigate a crowded market, reduce risk when making purchases, and enable us to express ourselves (Aaker, 1996). BP has become one of the key components in marketing thought, recognised by a wide range of authors (Doyle & Saunders, 1985; Maggard, 1976; Aaker & Shansby, 1982; Wind, 1982; Carpenter et al., 1994; Arnott, 1994; Porter, 1996; Blankson & Kalafatis, 2004; Sengupta, 2005; Kapferer, 2012; Urde & Koch, 2014; Kotler & Keller, 2016).

Keller (1999) argues that positioning is essential to creating a strong brand and should be at the basis of all marketing activities. A well-positioned brand appeals to the specific needs of a target audience, leading to high consumer loyalty, positively shaped preferences and beliefs about brand value, and a greater willingness to choose the brand (Schiffman & Kanuk, 2007; Trommsdorff & Paulssen, 2005). However, there is a lack of a coherent definition for BP, and complex implementation has resulted in less appreciation of the concept (Blankson & Kalafatis, 1999). As a result, it has been challenging to measure positioning accurately. BP has been perceived both as the part and the whole of branding.

Positioning is conceptualised as a complex multidimensional construct that attempts to positively adjust the tangible characteristics of the offering and the intangible perceptions of the brand in the marketplace. Scholars have historically classified firm resources as either tangible or intangible (Hofer & Schendel, 1978; Wolff & Reed, 2000; Barney, 1991), and it is difficult for a single intangible or tangible resource to be the sole source of value creation. Firms must usually bundle their portfolio of available resources into capabilities that can be leveraged for successful performance (Teece, 2007; Sirmon et al., 2009).

Some strategy researchers (Ambrosini & Bowman, 2009; Kor & Mesko, 2013; Molloy & Barney, 2015) have suggested that intangible resources are considered the most likely sources of firm success because they are not easily acquired and replicated in factor markets. However, since firms are bundles of intangible and tangible resources, it isn't typical for a firm to compete based on a single intangible resource, as important as it may be (Sirmon et al., 2011; Kor & Mesko, 2013).

Trout & Rivkin (2001) determine the essence of positioning: "Positioning is what you do with the human's mind because it is possible only there". Positioning is essential to a company to differentiate itself in consumers' minds. The purpose of positioning is not to create something new, but to interact with existing mental constructs. Altering entrenched perceptions in the consumer's mind is particularly challenging. That is a system organized by companies that allows one to gain access to a person's consciousness.

A brand creates interactions with stakeholders, and there are many facets to looking at a brand and its position. Brands can be understood from either an input or an output perspective since both marketers and customers participate in the branding process. Input perspectives are based on the notion that branding is a tool for directing resources that influence consumers. Brands can also be viewed from an output perspective, which refers to how customers perceive the brand, either through an image or a relationship. Brands also have a temporal perspective, recognising the evolutionary nature of brands (de Chernatony & Riley, 1998). Empirical

research predominantly examines the effectiveness of specific position strategies in terms of input and outcome (Urde & Koch, 2014). However, the author agrees with the view of positioning as a dynamic and changing process that is influenced by market changes, consumer perceptions, and competitive actions (Langley et al., 2013), and brands continuously emerging as dynamic outcomes of stakeholder interactions (Gyrd-Jones & Kornum, 2013; Vallaster & Wallpach, 2013; von Wallpach et al., 2017).

Reviewing the theories of the positioning concept by authors such as Keller (2001), Kotler (1999), Lury (2005), and Trout (1969, 2000), one must conclude that one of the most essential questions in marketing strategy is the company's positioning in the market. The amount of information a person encounters in everyday life is overwhelming and, therefore, impossible to comprehend. According to Aaker (1997), a person's consciousness selects and accepts only the information that meets their current experience and knowledge. Trout (2001) determines the essence of positioning: "Positioning is what you do to the mind of the prospect. That's where it all happens." Kotler (2016) later said: "Marketers need to target not only the minds of the customers but also their hearts and well-being." Kotler expanded the previously developed branding conceptual four-step model, incorporating two new elements: "brand trust" and "brand beneficence". While BP has been widely discussed in both academic and practitioner literature, comprehensive and systematically integrated approaches to its conceptualisation remain relatively limited.

Both brand image and BP deal with how consumers create a mental picture of a brand; however, positioning takes this thought one step further by recognising that consumers make choices based on comparisons with competing products. Companies must create a unique position in the minds of customers (e.g., Ries & Trout, 1981; Day, 1981; Myers, 1996; Ligas & Cotte, 1999; Temporal, 2002; Keller, 2003; Kotler, 2003; Blythe, 2005), often referred to as psychological positioning. For example, Blythe (2025), following the claims of predecessors, states: "Positioning is about creating a unique place in the mind of the customer, so that the product is remembered and preferred over competitors." Temporal (2002) emphasises that BP is not solely about what a company communicates, but also about how brand attributes are interpreted and internalised in customers' minds. He highlights that positioning is fundamentally about perception – how the brand differentiates itself from competitors and how this distinctiveness is communicated to the market. This underscores the importance of brand image among other positioning attributes, as it plays a critical role in shaping customer expectations and emotional engagement with the brand (Temporal, 2002).

Objective attributes of brands can also be compared; this is called product positioning (Melin, 1999). The company must integrate the product positioning with psychological positioning to avoid striving for a position they cannot achieve.

BP is an acknowledged marketing tool for coordinating the company's communication (Aaker, 1996; Bhat & Reddy, 1998; Keller, 1999; Kalafatis et al., 2000; Ries & Trout, 2001). The concept of positioning relates to position in the same way as a means related to its goal (Melin, 1999). According to Ries and Trout (2001), positioning is the first concept that tries to resolve the complex problem of getting heard in a crowded marketplace. Positioning creates a positive image for a product or company, thereby giving the company a competitive advantage over its



rivals. The set of perceptions, impressions, and feelings that a customer has about a product or company is also referred to as the position (Kotler, 2001). Companies should not leave positioning to chance; they should plan and communicate how they wish to be perceived by customers. How to effectively reach the customer with the correct associations is a significant challenge for marketers today (Ries & Trout, 2001; Trout & Rivkin, 2000). The company must integrate product positioning with psychological positioning to avoid striving for a position they cannot achieve (Melin, 1999).

The brand position must be able to deliver a point of superiority – differentiation that gives a competitive advantage (e.g., Ries and Trout, 1981; Lilien and Rangaswamy, 2003; Kapferer, 2008; Porter, 2008, etc). Differentiation can be created from a functional benefit, an emotional or self-expressive benefit, an organisational attribute, a brand personality, or a customer relationship. Typically, it is not possible to excel in all aspects; instead, the company should strive to avoid inferiority in key attributes while maintaining superiority in at least one area (Aaker, 1996).

To complement the theoretical overview, Appendix 2 presents a qualitative content analysis of key citations and theoretical perspectives on BP. This structured analysis supports the identification of core conceptual categories relevant to the development of the proposed model. These elements are further examined in Section 2.2 of the Doctoral Thesis, where the author analyses theoretical components in greater depth and integrates relevant literature to substantiate the model's conceptual framework.

**Brand interaction with the target audience and building loyalty.** To enhance consumer engagement with a brand, the brand must be aligned with the target audience's values (e.g. Aaker, 1996; Kapferer, 2012). Kotler and Keller (2016) state: "To enhance consumer engagement with a brand, the brand must be aligned with the target audience's values." The emotional attraction, driven by the values of the parties involved, determines strong brand loyalty (e.g., Aaker, 1995; Wheeler, 2009). Common values build more substantial and long-term relationships with consumers. In the 21st century, human values are increasingly integrated into brand management and communication, including product development, as a means of finding a connection with consumers or a group of consumers who share common values. For example, Aaker (1995) defines the components of a brand's personality, which include aspects of personality traits, in shaping a brand's emotional perception. Wheeler (2009) also points out that companies need to establish an emotional connection with consumers to foster long-term loyalty. Appropriate personalisation of the brand and its maintenance in communication creates a stable emotional image of the brand. "Strong brands remain outside the densely populated market," says Wheeler. People fall in love with brands, trust them, and believe in their superiority.

Over the last decade, corporate and brand values have become increasingly linked to ethical attitudes, necessitating a correlation. Busch and Murdock (2014) explore the concept of value-based leadership, emphasizing that contemporary organisations, including brands, must demonstrate ethical responsibility and alignment of their core values with evolving societal expectations and consumer values. This alignment has become particularly critical over the last decade, as stakeholders increasingly demand authenticity and ethical integrity in brand

behaviour and strategic positioning. Values determine motivational reasoning, and understanding the target audience’s values also helps to understand the decision-making process of customers in business, for strategy development, and for innovation positioning as a process.

Fig. 1.2 presents an adapted decision-making model based on Keller’s (2019) framework for conceptualising, measuring, and managing customer-based brand equity, as interpreted through the lens of BP. See also Appendix 4 for a version of the model adapted to a simplified and visually communicable format, suitable for use in presentations or stakeholder discussions.

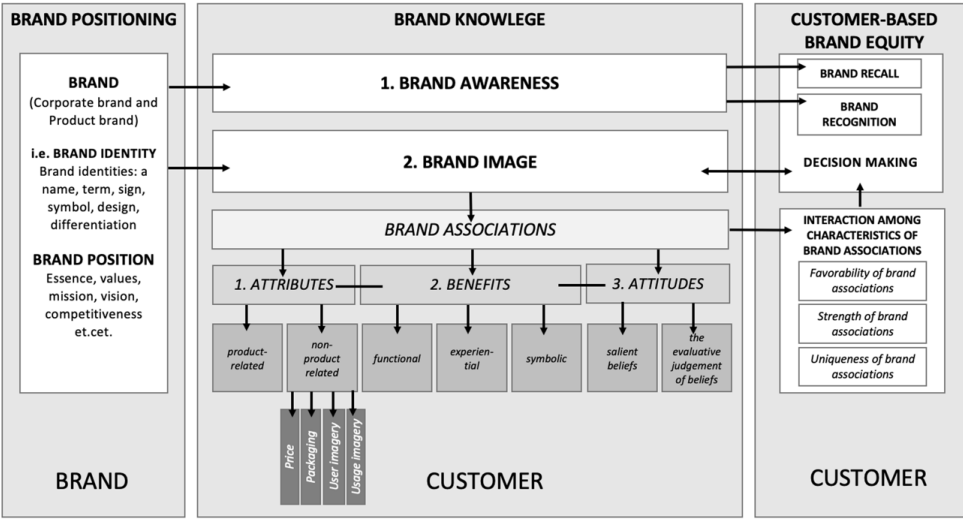


Fig. 1.2. Model of decision-making from the prism of positioning (created by the author, adapting Keller’s statement about conceptualising, measuring, and managing customer-based brand equity, 2019).

**Brand image and brand identity.** As shown in Fig. 1.2, brand image plays a crucial role in forming customer associations and, consequently, in the decision-making process and brand equity. Although brand image has long been regarded as a foundational concept in marketing (Gardner & Levy, 1955), scholars have yet to reach consensus on its precise definition (Dobni & Zinkhan, 1990). Drawing on earlier interpretations by Herzog (1963) and Newman (1957), as well as the associative network memory model, this Doctoral Thesis adopts a definition of brand image as the perceptions consumers hold about a brand, formed through the associations stored in their memory.

Brand associations are the other informational nodes linked to the brand node in memory, containing the meaning of the brand for consumers. The favourability, strength, and uniqueness of brand associations are the dimensions that distinguish brand knowledge and play a crucial role in determining the differential response that constitutes brand equity, especially in high-involvement decision settings. Before considering those dimensions, it is helpful to examine the different types of brand associations that may be present in consumer memory (Keller, 1993). Additionally, Aaker (1996) later indicates a separate perception of BP and identity concepts, stating that a similar concept to brand identity is BP. Both concepts refer to how the

company would like the brand to be perceived by others. BP is seen as part of the brand identity that is actively communicated. Thus, BP is perceived as a narrower concept than brand identity, and BP is integrated into the brand image concept.

BP, including brand identity, is created by predicting the brand image; BP is projected onto the modelled brand image. However, the problem is that the identity is not equated with the brand image; instead, the image is modelled according to the brand identity and other attributes. Kapferer (2008) states that consumers and prospects are often asked to describe their ideal brand and the attributes it would need to gain universal approval. This approach fails to segment expectations and does not define the average brand ideal. These expectations are often aspirational but mutually incompatible, making it difficult for brands to fulfil them without losing their distinctiveness. In pursuing them, such brands may lose their identity and regress to the average level. In seeking to resemble the ideal brand described by consumers (or industrial buyers) at all costs, brands often begin to downplay their differences and appear average. Kapferer mentions brand identity and image mistakes: 1. copying; 2. obsession with creating an attractive image that everyone will like; 3. The imagined identity, the imagined image, does not correspond to the truth.

BP can be done to shape the brand image. According to Aaker (1996), when comparing brand identity with brand image, there are three possible objectives for BP. Objectives for Positioning: 1) augmented, if a dimension needs to be added or strengthened (e.g., add social group acceptance); 2) reinforced and exploited, if the image associations are consistent with the identity and are strong (e.g., reinforce fun and humorous personality); 3) diffused, softened or deleted, if the image is inconsistent with the brand identity (e.g., soften the middle-aged-user image, to increase acceptance among young people). Wheeler (2009) also emphasises that companies must establish an emotional connection with consumers to foster long-term loyalty. Appropriate personalisation of the brand and its maintenance in communication create a stable emotional image of the brand. “Strong brands remain outside the densely populated market,” says Wheeler. People fall in love with brands, trust them, and believe in their superiority.

The distinction between brand identity and image highlights a core challenge in brand management – aligning internal aspirations with external perceptions. Positioning serves as the interface between these two concepts, translating identity into a perceivable and resonant image in consumers’ minds. This dynamic process becomes even more complex when stakeholder values are taken into account. The following section, therefore, turns to the concept of values-based BP, which extends the discussion beyond image management toward deeper motivational and emotional alignment with target audiences.

**Values-based BP.** Marsden (2002) states: “The entire enterprise of branding itself can be understood as an exercise in positioning; using product experience and marketing initiatives to increase profitability by associating trademarks with compelling consumer values”.

Values are abstract representations of desired end-states that serve as guiding principles in people’s lives (Schwartz, 1990). Human values motivate people's choices and serve as the basis for their actions. Values are usually explained by a hierarchy of values (e.g., Scheler, Hartmann, Schwartz). We prefer one good course of action, one type of behaviour, because one value is selected over another (Hartmann, 1967). Frondizi believes that values are prejudging because

people cannot judge without values (Hartmann, 1967). Values are evaluated in the evaluation process. Values are represented in the brain as a hierarchy of emotionally toned thoughts, with what we 'like' and find compelling at the top, and what we loathe at the bottom (Goleman et al., 2002). In business, shared abstract human values are transformed into concrete and material reality when embodied by brands (Allen, 2002).

Brand hexagon by Urde (1999) integrates brand equity and brand identity with a company's direction, strategy, and identity. Both emotions and rational thought are involved, and the consumer's perception and the company's intentions are included in BP. At the centre of the model lies the core process of brand meaning creation, which provides for positioning and core values (see Fig. 1.3).

Fig. 1.3. Brand hexagon model (created by the author, based on Urde's Brand hexagon, 1999).

Roberts' (1994) observation suggests that the target audience should be studied in depth and continuously, as actual actions do not always align with the expressed values. Roberts found: “As with all mental models, there is a difference between our stated values, which we profess to believe, and our values in action, which guide our behaviour”. BP, as a component of a strategic approach, is applied to evaluate and strengthen the correlation between values (Ence et al., 2021).

Understanding what consumers truly value and why is much more complicated, Almquist (2016) and his colleagues have identified 30 “Elements of Value” based on Maslow’s hierarchy of needs that span four categories: functional, emotional, life-changing, and social impact (see Fig. 1.4). In the extensive research (surveyed more than 10’000 customers of nearly 50 U.S.-based companies across multiple consumer-facing sectors), the authors don’t accept a consumer’s statement that a particular product attribute is necessary; instead, they explore what value underlies that statement. Extensive research has found that in general, the more elements provided, the greater customers' loyalty and the higher the company's sustained revenue growth.

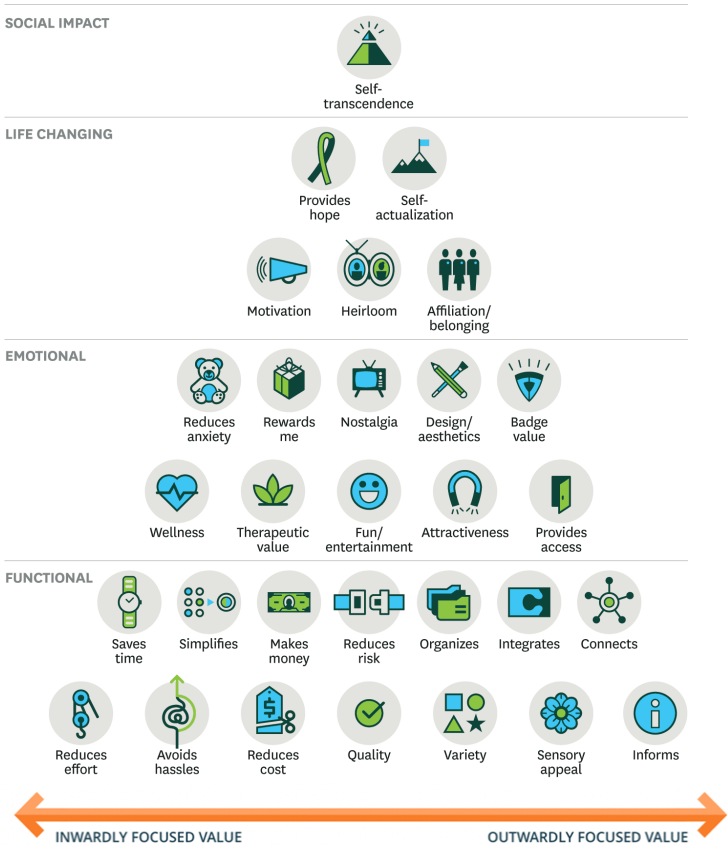


Fig. 1.4. The elements of value pyramid (Almquist et al., 2016).

A recent survey found that successful companies deliver multiple elements of value – these companies experience better business performance. When analysing the value proposition of

brands in the context of positioning, the pyramid can serve as a tool for evaluating values and determining the extent of value dimension coverage.

The importance of the correlation of the values of the brand with the parties involved was determined by Hume as early as the 18th century. He claims that moral distinctions are derived from feelings of pleasure and pain of a special sort, and not from reason (Hume, 1739). Hume studied the dynamics of human choice; he considered that decisions are directly related to our “passions.” However, we preferred to say otherwise. While understanding is undoubtedly essential, any choice becomes more effective with emotional force. Similar findings today apply to BP. Trout (1969) states that positioning results from human perception, and Kotler (2016) asserts that marketing professionals need to target not only the minds of customers but also their hearts and well-being. Therefore, it is essential to delve deeper into the customer to understand the values and motivations that are associated with them. Positioning’s purpose is not to create something new but to interact with what is already in people’s minds using existing responses. To change existing fundamentals in people’s minds is particularly difficult. BP is a system organised by companies that enables them to reach a person’s consciousness (Trout, 2000).

The positioning encompasses several elements, including the "values/communication/relations" element, which pertains to both the brand and stakeholders, thereby forming a unifying platform based on shared values. The author justifies the importance of value-based BP because this approach creates a correlation with the values of stakeholders, which is the primary influencing factor in decision-making and actions (Ence et al., 2021).

A brand needs to be authentic and genuine. 86 % of consumers believe authenticity is a key factor in deciding which brands they support (Gitnux market data report, 2024). Kotler (2016) notes: “Just be true to your brand’s purpose. We live in the era of horizontal communication where vertical control is less effective. Only honesty, originality, and authenticity will work.” The functional and emotional values of a brand can be described as a promise of future satisfaction (Berry, 2000). Marsden (2002) states that profitability can be increased by associating trademarks with compelling consumer values.

Values-based positioning emphasises the importance of fostering emotional and ethical resonance with stakeholders, thereby contributing to long-term brand trust and sustainability. As values increasingly guide consumer and organisational decision-making, the way brands position themselves must reflect these shifts. The discussion now turns to the strategic implications – how companies translate these values and insights into concrete positioning strategies in the marketplace.

**Positioning statement.** Defining a positioning statement for a brand is considered an iterative process, whereby the brand’s team proposes the positioning, gauges consumers’ responses, and then builds on their feedback to refine their thinking – the BP is managed (Chernatony, 2010). Rossiter and Percy (1997) argue that a good positioning statement should have a structure defining the target audience, brand name, category, and benefits of the offer.

Tybout and Sternthal (2005) identify four key elements of the positioning statement: the target group, the frame of reference, the point of difference, and the reason to believe. When developing a BP, Sternthal and Tybout (2002) emphasise that it is essential not to overlook the

importance of clarifying to customers the frame of reference for the brand, identifying standard features with competitors. Clarifying a brand's frame of reference to customers helps them appreciate the cluster of functional benefits they can expect from the brand and thus understand how it can help them achieve their goals.

Once a positioning statement is drafted, the brand's team could consider if: 1) communicates simply what the brand stands for; 2) reflects the key motivations that might drive customers to buy it; 3) differentiates the brand from competitors; 4) captures the imagination and understanding of staff; 5) provides a direction for all staff to follow; 6) does not restrict the brand's scope for future extensions (Chernatony, 2010).

**Lifestyle trends.** Lifestyle trends should also be considered as a factor influencing BP. Lifestyle trends are influenced by the environment and human perceptions of future directions when making decisions today. When describing effective BP, Keller (2013) emphasises that a good positioning must balance current relevance with future potential: "a foot in the present and a foot in the future." This principle ensures both clarity and strategic elasticity in the brand's long-term evolution. It is crucial not only to know the market and competitors, but also to know future trends for successful business development and accurate, purposeful BP. The introduction of new products in the market, as well as the reflection of the concept, reaches the consumers with a time lag; therefore, new product development and BP must take place with a view to the future. Companies, through BP, outline their plans in communication with stakeholders, trying to decide on the deal today and considering their future position.

**BP - dynamic process.** Whilst marketing is defined as a process (AMA, 2013), marketing and strategic marketing management have been dominated by an emphasis on normative models of strategy formation (e.g., Kotler & Keller, 2016; Aaker, 1991). Marketing processes in these terms refer typically to a stepwise process, from business mission, marketing audit, assessment of internal capabilities, and identification of goals, to development of core strategy, marketing mix decisions, and implementation encapsulated in the marketing planning process (Jobber & Ellis-Chadwick, 2012; Evans & Laskin, 1994). In the field of positioning, this approach is primarily replicated as a rational decision-making process involving analysis and implementation (Hooley et al., 2008).

There is currently strong and developing empirical evidence that suggests brands continuously emerging as dynamic outcomes of stakeholder interactions (Gyrd-Jones & Kornum, 2013; Vallaster & von Wallpach, 2013; von Wallpach et al., 2017). When BP is perceived explicitly as a change process, for example, Wider et al. (2018) present a process philosophy as understanding a brand emergence that comprises: 1) heterogeneity, 2) continuous multiplicity, and 3) change. The brand process is constituted by complex assemblages, rather than managerial manifestations, where these assemblages are "not the same from one moment to the next" (Lury, 2009). The process approach appears to encompass the entire field of marketing, from the marketing process (Day, 1990) to marketing-related processes (Tharp & Scott, 1990) and processes of positioning (Urde & Koch, 2014).

However, BP is still sometimes viewed more in terms of identifying a competitive position rather than as a dynamic and intra-organisational process of positioning. Therefore, the

positioning concept is both theoretically and practically underdeveloped, lacking guidance for the management and maintenance of positioning over time (Park et al., 1986; Urde & Koch, 2014).

**Repositioning.** Repositioning is what helps keep well-managed firms at the top of their industries. Repositioning can be used to cope with the arrival of new competitors, the sudden availability of new technologies, and the evolving dynamics of the marketplace with equal effect. Trout and Rivkin (2009) discuss highly competitive conditions as necessitating a change in positioning, indicating a continuous and dynamic positioning process. Brands should continually reposition themselves to actively cope with change and ensure the firm remains relevant and viable (Trommsdorf, 2002).

According to Kapferer (2008), “Back to the core” is a classic revitalising strategy. It does not mean being obsessed with the past, but if the early vision and mission are still valid, trying to come back to it while acknowledging that the product itself may need to be updated.”

While positioning is traditionally associated with brand creation and market entry, it also serves as a powerful approach in brand audits and brand revitalisation. According to de Chernatony (2021), BP is not a one-time strategic declaration but a living construct that must be monitored and re-evaluated over time. Through positioning-based audits, organisations can assess whether the brand is still perceived in line with its intended identity and whether the communicated value proposition remains relevant in changing environments. Such audits examine how well the brand’s positioning aligns with its vision, identity, stakeholder expectations, and marketplace realities. This allows firms not only to validate consistency but also to detect gradual strategic drifts or perceptual gaps. De Chernatony (2021) emphasises that “brand audits must go beyond visual and verbal cues and explore whether the positioning continues to reflect what the brand promises and delivers”.

Therefore, a positioning framework, such as the one used during initial brand definition, can be successfully reapplied to assess internal alignment, stakeholder perceptions, and brand health. This approach makes BP a dynamic diagnostic mechanism, instrumental for ensuring continuity, strategic coherence, and brand equity over time.

**Positioning for the master brand, corporate brand, and product brand.** Though most brand-building models were developed for product-based brands (de Chernatony & Segal-Horn, 2003), the corporate branding process is also widely studied (e.g., Aaker, 1996; Melin, 1999; Keller, 2003; Urde, 2003; Knox & Bickerton, 2003; de Chernatony, 2010).

A master brand is the primary brand in a firm’s portfolio. A corporate brand is considered a master brand when its products use the unifying corporate identity. A master brand generates leverage, synergy, and clarity (Aaker, 2004). A key difference between a corporate brand and a product brand is that responsibility for the former lies at a higher level in the organisation (Balmer, 2001). As the corporation itself becomes the focus, the values it represents become key elements of differentiation strategies (Hatch & Schultz, 2003). A strong corporate brand will create positive customer perceptions of existing products and new product extensions (Hatch & Schultz, 2003; Knox & Bickerton, 2003). According to Aaker (2004), the corporate brand plays a prominent role in the brand portfolio. Urde (2003) states that core values serve as



a link between the corporate brand and the product brand. They provide credibility to the corporate brand while differentiating product brands (see Fig. 1.5).

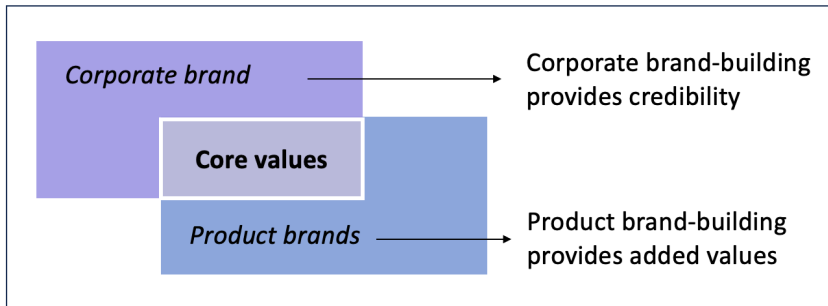


Fig. 1.5. Core value framework linking a corporate brand to product brands (Urde, 2003).

The Core Value Framework, developed by Urde (2003), illustrates the strategic link between a corporate brand and its product brands through shared core values. The model emphasises that corporate brand building should be grounded in clearly defined core values, which serve as a unifying foundation across internal culture, brand identity, and external brand expressions. By aligning all brand activities with these core values, organisations can foster consistency, authenticity, and long-term strategic coherence across their brand architecture.

Some brands also require multiple positions. Keller (2003) argues that when brands span numerous product categories, as is often the case for corporate brands, they are likely to have many related but distinct positions. Therefore, the brand has specific core values applicable to all markets, with approximately 5 to 10 key associations with the most critical brand dimensions. Associations can be identified through a mental map, a detailed portrait of all salient brand associations for a particular target market and then grouped into related categories. Each category is a potential core value.

Several authors emphasise a shift from product brands to corporate brands, both in practice and theory (Knox & Bickerton, 2003; De Chernatony, 2001; Harris & de Chernatony, 2001; Leitch & Richardson, 2003). The sender of a message must represent the actual source (i.e., the company behind the brand), which is the case for corporate brands (Kapferer, 2001).

### 1.1.3. An overview of the types of brand positioning strategies

In essence, a positioning strategy (intended or actual positioning) is defined as “an attempt to move brands to a particular location within a perceptual product space” (Dillon et al., 1986) and is generally implemented to communicate a brand image and differentiate the brand from competitors to achieve a position (Park et al., 1986). Thus, a positioning strategy can reflect the intended or the actual positioning.

There are different approaches to defining BP, and brands can use several of them to achieve their strategic positioning objective. For example, strategies for master brands include umbrella or corporate positioning, positioning against competitors, positioning by attribute, positioning by price-quality, filling several market positions, and packaging (Aaker & Shansby, 1982; Schiffman et al., 2014). Schiffman et al. (2014) outline several positioning strategies applicable

to master brands, including umbrella positioning, attribute-based and competitor-based approaches, as well as packaging and price–quality positioning.

Although only the intrinsic dimension positioning is usually discussed (Ries and Trout, 2001), price is also a strong determinant. Riezebos (2003) argues that BP takes place along two dimensions: the relative price and the intrinsic dimension. Three strategies exist for positioning along the price dimension: low-cost, premium, and prestige. When a low-cost strategy is employed, the brand adds little value to the product and typically serves only as a sign of recognition. Riezebos argues that companies should strive to align their intrinsic attributes with those of more exclusive brands. By proposing this, Riezebos goes against what is often said in the positioning literature, that a brand should be distinguishable from other brands. For premium and prestige strategies, there are many possibilities to make the brand meaningful to consumers. These brands should capitalise on their advantages, whether based on material or immaterial aspects. When positioning on intrinsic attributes, the brand either adopts a functional approach, in which the attributes remain central, or an emotional approach, in which the experience surrounding the brand is most important.

The marketing literature outlines a range of strategic approaches to BP, reflecting how brands differentiate themselves based on attributes, competitors, price, symbolism, and other criteria. Table 1.2 summarizes the most frequently discussed positioning strategies, illustrating the diversity of methods used to establish a brand’s place in the market.

Table 1.2

A compilation of diverse brand positioning strategies (created by the author)

| No. | BP strategy approach             | Author            | Year | Definition                                                                           |
|-----|----------------------------------|-------------------|------|--------------------------------------------------------------------------------------|
| 1   | Price-based positioning          | Kotler P.         | 1988 | Emphasises the brand's value proposition in terms of price.                          |
| 2   | Attribute positioning            | Ries A., Trout J. | 1986 | Focused on specific product features or attributes to differentiate the brand.       |
|     |                                  | Trout J.          | 2000 |                                                                                      |
| 3   | Competitor-based positioning     | Ries A., Trout J. | 1986 | Positions the brand relative to competitors, highlighting points of differentiation. |
| 4   | Usage or application positioning | Ries A., Trout J. | 1986 | Focuses on specific use-cases or applications of the product.                        |
| 5   | Innovative positioning           | Moore G.          | 1991 | Highlights the brand's commitment to innovation and cutting-edge solutions.          |
|     |                                  | Chesbrough H.     | 2003 |                                                                                      |
|     |                                  | Hippel E.         | 2005 |                                                                                      |
| 6   | Cultural or symbolic positioning | Aaker D.          | 1995 | Associates the brand with cultural symbols, values, or lifestyle elements.           |

Table 1.2 (continued)

| No. | BP strategy approach          | Author                  | Year | Definition                                                                               |
|-----|-------------------------------|-------------------------|------|------------------------------------------------------------------------------------------|
| 7   | User-based positioning        | Aaker D.                | 1995 | Tailors the brand's messaging to resonate with a specific target audience.               |
| 8   | Benefit positioning           | Kotler P., Keller K. L. | 2006 | Emphasises the unique benefits and solutions a product or service provides to consumers. |
| 9   | Problem-solving positioning   | Kotler P.               | 2006 | Positions the brand as a solution to specific consumer problems or challenges.           |
| 10  | Quality or luxury positioning | Kapferer J.-N.          | 2012 | Positions the brand as a high-quality or luxury option in the market.                    |

The wide range of positioning strategies discussed in the literature confirms that no single approach is universally applicable. Brands must choose strategic paths that align with their capabilities, target audience, and competitive context. However, the application of these strategies requires theoretical support. The following section, therefore, reviews key BP models that offer structured guidance for implementing these strategies effectively.

Positioning is inseparable from SM because “strategic positioning means performing different activities from rivals or performing similar activities in different ways” including operational effectiveness activities (Porter, 1996).

#### 1.1.4. Literature review of models of brand positioning and branding

Various positioning models describe how elements interact with each other in the context of BP. The main elements are explored in depth in part 3, in practical studies. Different models of BP and branding exist, each employing distinct approaches. Each offers its unique attributes. BP models and branding models help to guide the positioning process purposefully. BP should be viewed as a complex means to achieve benefits for the company.

Over the years, scholars have developed various models to conceptualise the process and elements of BP. These models differ in focus – from brand identity and customer perception to emotional benefits and value-based frameworks. Table 1.3 presents a selection of nine representative BP models derived from the literature (see also Appendix 3 for a detailed overview).

Brand positioning models (created by the author)

| No. | Year | Author          | Name of model                                                 |
|-----|------|-----------------|---------------------------------------------------------------|
| 1   | 1986 | Park W. et al   | Brand concept management                                      |
| 2   | 1996 | Aaker D.        | Brand identity planning model                                 |
| 3   | 1999 | Urde M.         | Brand hexagon                                                 |
| 4   | 2001 | Keller K.L.     | Customer-based brand equity model                             |
| 5   | 2002 | Davis S.        | Brand asset management process                                |
| 6   | 2003 | Urde M.         | Internal and external core value-based brand building process |
| 7   | 2010 | Kotler P. et al | 3i model                                                      |
| 8   | 2011 | Urde M.         | Market and brand-oriented framework                           |
| 9   | 2016 | Kotler P.       | 6-step branding conceptual model                              |

The proposed models provide a comprehensive view of BP:

1. Model No. 1: Park et al. (1986) present a normative framework, termed Brand concept management, for selecting, implementing, and controlling a brand image over time.
2. Model No. 2: Aaker (1996), using the Brand identity planning model, proposes strategic brand analysis as a starting point for planning brand identity. This analysis encompasses the examination of customers, competitors, and the firm itself. Customer analysis includes factors such as motivation, trends, needs, and segmentation. The firm must determine the functional, emotional, and self-expressive benefits that customers seek. It is also necessary to analyse current and future competition. BP, as well as the strengths and weaknesses of competitors, are essential inputs. The key to differentiating the brand lies in knowing how competitors are perceived among customers. Another critical issue is how competitors want to be perceived, which is evident in their advertising.
3. Model No. 3: Urde (1999) has developed Brand hexagon – the model integrates brand equity and brand identity with a company's direction, strategy, and identity. Both emotions and rational thought are involved, and the consumer's perception and the company's intentions are included in BP. At the centre of the model lies the core process of brand meaning creation, which consists of the positioning and core values.
4. Model No. 4: According to the Keller's (2001) created Customer-based brand equity model, building a strong brand involves four steps: 1) establishing the proper brand identity, that is, establishing breadth and depth of brand awareness, 2) creating the appropriate brand meaning through strong, favourable, and unique brand associations, 3) eliciting positive, accessible brand responses, and 4) forging brand relationships with customers that are characterized by intense, active loyalty. Achieving these four steps, in turn, involves establishing six key brand-building blocks: brand salience, brand performance, brand imagery, brand judgments, brand feelings, and brand resonance. The most valuable brand-building block, brand resonance, occurs when all the other brand-building blocks are established. With true brand resonance, customers exhibit a

high degree of loyalty to the brand, actively seeking opportunities to interact with it and share their experiences with others.

5. Model No. 5: Davis (2002) suggests follow to Brand asset management process, which involves 11 steps in four phases: 1) developing a brand vision, 2) determining the company's "brand picture" by understanding consumer perceptions about the brand and of competitor brands, 3) developing a brand asset management strategy, to determine the correct strategies for achieving goals according to the brand vision, 3) supporting a brand asset management culture.
6. Model No. 6: The Internal and external core value-based brand building process, as outlined by Urde (2003), provides a framework based on the idea that a brand's identity is developed through a continual and ongoing interaction between the organisation's identity and that of the customer. In this way, the organisation's values, overall mission, and vision of what is to be achieved – beyond generating profits – obtain their true meaning. Brands can therefore be seen as symbols of an organisation's efforts and ambitions.
7. Model No. 7: Emotional marketing was introduced as a new emerging trend in Marketing 3.0, developing the 3i model, among other things. Kotler et al. (2010) propose that the purpose of the brand triangle is that, according to the model, even though a brand may already have an identity in consumers' minds, it does not necessarily have to be a good one, and that firms need to be aware of this. It serves as a reminder for businesses to be authentic, as consumers tend to quickly form an opinion about whether a brand is authentic or not. According to Kotler et al., the BP should be done effectively, reaching the target market and responding to the customer's needs and wants. The mention above gives the company a brand identity, but differentiation is needed to ensure it is a positive one, as brand differentiation leads to a strong brand image. A brand with good brand integrity makes promises of delivering value and lives up to them, which is essential for a successful company; all three components should be functional.
8. Model No. 8: Urde et al. (2011) developed a framework. The market and brand-oriented framework show schematically that outside-in and inside-out perspectives, respectively, reflect the market and brand-oriented paradigms: they are different, but synergistic. This conceptual framework is generally used in the review and categorisation of existing brand models. The model offers an explicit and logical structure, clearly distinguishing the internal, core, and external components of a corporate brand's identity.
9. Model No. 9: Starting from 2016, Kotler expanded the Branding conceptual model, incorporating two new elements: brand trust and brand beneficence. He points out that "marketers need to target not only the minds of the customers but also their hearts and well-being". According to Kotler (2016), a company should start by setting the brand's purpose, using positioning and differentiation to communicate that purpose, and ultimately enrich the brand's identity. Brand trust is essential, and the final consideration is whether the brand delivers brand beneficence: does the brand serve the person and society well?

While each model offers valuable insights, most focus either on internal brand-building or consumer-facing logic. Few integrate the broader strategic and sustainability-related implications of positioning. Given the growing importance of long-term economic viability and stakeholder alignment, this section examines the role of BP in sustainable business development.

## **1.2. The importance of brand positioning strategy in business development**

BP strategy constitutes a cornerstone of contemporary business development, as it links organisational identity with market perception and competitive advantage. Its importance extends beyond communication, shaping long-term growth, differentiation, and sustainable value creation for companies operating in dynamic and competitive environments.

### **1.2.1. Factors affecting sustainable business development**

Sustainability is broadly understood through three interconnected dimensions: environmental sustainability, which involves the responsible management and conservation of natural resources; social sustainability, which emphasises equitable and accountable behaviour toward society; and economic sustainability, which focuses on fostering long-term economic growth and financial responsibility (Purvis et al., 2019; World Commission on Environment and Development, 1987). These dimensions collectively aim to ensure that present needs are met without compromising the ability of future generations to meet their own needs.

The author acknowledges the importance of all three dimensions, but **the Doctoral Thesis specifically focuses on economic sustainability within the context of BP for sustainable businesses**. The research aims to investigate BP as a strategic approach to sustainable business development. This emphasis reflects the critical need to align business strategy, BP, and marketing practices with sustainable economic principles in today's competitive and resource-conscious market. The generation of a business case for sustainability has implications for a business's competitiveness strategy (Baumgartner & Ebner, 2010), and competitive advantage is also a critical element of BP. Poor sustainability strategies can create conflicting goals between competitiveness and sustainability, thereby increasing the likelihood that the plan will be dropped (Long, 2020).

The idea of “sustainable development” in the environmental and social context was first widely articulated in the 1987 United Nations Brundtland Report (World Commission on Environment and Development, 1987). The “Brundtland definition” of sustainable development was framed as “...development that meets the needs of the present without compromising the ability of future generations to meet their own needs”. It posits that the only truly sustainable form of progress is that which simultaneously addresses the interlinked aspects of economy, environment, and social well-being. In the subsequent two years, around 140 alternative and variously modified definitions of “sustainable development” emerged. Currently, it has been estimated that approximately three hundred definitions of “sustainability” and “sustainable

development” exist within the broad domain of environmental management and the associated disciplines that link to it, either directly or indirectly (Johnston et al., 2007).

Businesses are founded and run for economic purposes. However, companies are increasingly developing strategies that integrate sustainability goals and objectives. These strategies aim not only to mitigate negative social and environmental impacts but also to enable businesses to have a positive and regenerative impact on society and the natural world. This is important, as businesses, and in turn, the strategies they use, can have a profound influence on production and consumption patterns (Michaelis 2003). A shift away from a focus on short-term profit to longer-term performance is often at the centre of many sustainable strategies. The extension of time horizons reduces the likelihood of businesses inflicting negative externalities on communities and can make many sustainability initiatives attractive in terms of ROI (Fowler and Hope, 2007). The “win-win” results can refer not only to BP but also to factors such as enhanced attractiveness as an employer and improved capacity to innovate (Schaltegger & Wagner, 2011).

The development of sustainable strategies requires linking sustainability to the creation of shareholder value. Linking these types of values legitimizes sustainability actions within conventional business contexts, highlighting how generating benefits for wider stakeholders is advantageous to a business's long-term prosperity (Hart et al., 2005; Porter and Kramer, 2011). Enhanced business performance is linked to contextual factors, including the health of ecosystems and local communities. The competitiveness of a company and the health of the communities around it are closely intertwined, providing further rationale and drivers for sustainable strategies. Therefore, management involvement is essential, and strategic BP can help integrate sustainability goals into the company's operations. In addition, OP is widely recognised as a **multidimensional construct**, encompassing both financial and non-financial indicators and reflecting a firm's overall efficiency and effectiveness in the short term (Venkatraman & Ramanujam, 1986; Richard et al., 2009). Complementing this, OS emphasises a company's long-term viability and strategic resilience, highlighting its ability to balance economic objectives with adaptive practices and stakeholder expectations (Dyllick & Muff, 2016; Montiel & Delgado-Ceballos, 2014). Taken together, these dimensions capture the dual logic of business development, linking immediate performance outcomes with the pursuit of sustained growth.

**Sustainable business development.** Sustainable business development encompasses various factors that contribute to economic viability and long-term growth while providing responsible environmental and social impacts. Since BP is examined in this Doctoral Thesis in the context of sustainable business, Table 1.4 outlines factors identified in the literature that contribute to long-term business sustainability.

Table 1.4

Factors that contribute to sustainable business development (created by the author)

| No. | Factors                            | Author                       | Year | Summary of study                                                                                                                                                                                                                                                                                                       |
|-----|------------------------------------|------------------------------|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Environmental Management Practices | Sharma, S., & Vredenburg, H. | 1998 | The importance of proactive environmental management strategies in sustainable business development is highlighted. Firms that adopt environmentally friendly practices tend to develop capabilities that enhance their competitiveness and long-term viability.                                                       |
| 2   | Corporate Social Responsibility    | McWilliams, A., & Siegel, D. | 2001 | Corporate social responsibility involves integrating social and environmental concerns into business operations. Firms engaging in corporate social responsibility activities tend to achieve better financial performance and long-term sustainability due to improved relationships with stakeholders.               |
| 3   | Stakeholder Engagement             | Freeman, R. E. et al.        | 2007 | Engaging with various stakeholders, including employees, customers, communities, and investors, is essential for sustainable business development. The importance of managing relationships with stakeholders to ensure organisational resilience and long-term success are emphasised.                                |
| 4   | Supply Chain Management            | Seuring, S., & Müller, M.    | 2008 | Sustainable supply chain management involves considering environmental, social, and economic factors throughout the supply chain. This study proposes a conceptual framework for integrating sustainability principles into supply chain management practices, which is crucial for long-term business sustainability. |
| 5   | Innovation and Technology Adoption | Hart, S. L., & Dowell, G.    | 2011 | The research discusses how innovation and technology adoption can drive sustainable business development. Companies that invest in sustainable technologies and innovation are better positioned to adapt to changing market demands and environmental regulations, thus ensuring long-term success.                   |



Table 1.4 (continued)

| No. | Factors      | Author                         | Year | Summary of study                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----|--------------|--------------------------------|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6   | Brand and BP | Porter, M. E., & Kramer, M. R. | 2011 | Businesses can create shared value by aligning their corporate strategies with societal needs. This includes leveraging the power of their brand and BP to address environmental and social challenges while simultaneously achieving economic gains. Companies that are perceived as socially and environmentally responsible through their branding efforts can enhance customer loyalty, attract talent, and differentiate themselves in the market, contributing to long-term business success. |

Extensive studies have been carried out in the scientific literature on the subject under consideration in this chapter. The mentioned research underscores the multidimensional nature of sustainability and the need for businesses to adopt holistic approaches to ensure long-term economic, environmental, and social progress. Among other things, BP plays a crucial role in sustainable business development, as it can significantly influence consumer perception, market competitiveness, and long-term profitability. By incorporating brand and BP into sustainability strategies, businesses can not only improve their reputation but also drive positive societal impact, leading to economic resilience and long-term development. Additionally, factors such as regulatory compliance, government policies, Employee Well-being and Engagement, Financial Investment, and Access to capital all impact business sustainable development.

**The importance of brand strategy in business development.** Essentially, strategy is a three-stage process involving analysis, formulation, and implementation. During the analysis phase, management needs to look both internally and externally. Understanding the wider business environment is fundamental. It is then necessary to formulate plans that are appropriate to both current and future circumstances. Finally, implementation ensures that our plans are put into practice. Managers must ensure that due care and attention are paid to each of these stages. In this way, strategy avoids being little more than rhetoric and starts to become a practical reality of business life (Drummond et al., 2008).

Brand orientation means that the formulation of the company's strategy is based on brands, focusing the company's commitment and resources on building, developing, and nurturing them. This approach achieves a platform for a sustainable competitive strategy (Urde, 1994). Corporate management capable of exploiting the potential of brands can obtain long-term competitive advantages – a strategy for survival in an increasingly competitive landscape.

Positioning is the most critical stage in the brand's asset management strategy. Carefully considered positions provide development directions for new products, market expansion, communication, pricing, and selection of distribution channels. BP is a process of creating an

image, distinctive properties, positive associations, and values in consumers’ minds to establish a sustainable trademark image and foster consumers’ attachment to this trademark (Fayvichenko, 2016). Aaker and Shansby (1982) conclude: “The positioning decision is often the crucial strategic decision for a company or brand because the position can be central to customers’ perception and choice decisions.” They note that a clear positioning strategy can ensure that the elements of the marketing program are consistent and supportive.

The reviewed literature confirms that BP, when aligned with sustainability-oriented thinking, can enhance both brand value and business resilience. Yet, to leverage this potential, companies must embed positioning into their strategic planning processes. The following section, therefore, focuses on the role of BP in business development, particularly in strategic planning and long-term competitiveness.

**1.2.2. Factors that contribute to brand economic viability and long-term growth**

Researching the factors that determine long-term brand development (BD), without emphasizing the issues of sustainability as environmental and social aspects, relevant studies are reflected in the scientific literature.

Long-term growth and success in business development are influenced by various factors, as evidenced by scientific research across different fields. Here are some key factors supported by scientific sources, see Table 1.5.

Table 1.5

Factors that contribute to brand economic viability and long-term growth (created by the author)

| No. | Factors            | Author                           | Year | Description                                                                                       | Aspect of BP                                                                                                                               |
|-----|--------------------|----------------------------------|------|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Market Orientation | Kohli, A. K.,<br>Jaworski, B. J. | 1990 | A market-oriented approach, focusing on understanding and meeting customer needs and preferences. | A well-defined BP strategy ensures that the brand resonates with its target market, effectively addressing their desires and expectations. |

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Table 1.5 (continued)

| No. | Factors                               | Author                          | Year | Description                                                                                                                                                                          | Aspect of BP                                                                                                                                                                                                                                                                                             |
|-----|---------------------------------------|---------------------------------|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2   | Organisational culture and leadership | Schein, E. H.                   | 1990 | A strong organisational culture and effective leadership are critical for fostering innovation, adaptability, and employee engagement, all of which contribute to long-term success. | BP reflects the values, personality, and identity of the organisation. Leaders play a critical role in shaping and communicating the brand's positioning both internally and externally. Perspectives on organisational culture and leadership shape and reinforce the brand's identity and positioning. |
| 3   | Strategic planning and management     | Barney J. B.                    | 1991 | Long-term success requires effective strategic planning and management.                                                                                                              | BP includes a strategic decision about product development, marketing strategies, and competitive differentiation. By defining a unique and compelling position in the market, businesses can sustain a competitive advantage over the long term.                                                        |
| 4   | Adaptability and flexibility          | Tushman, M. L., O'Reilly, C. A. | 1996 | In a dynamic business environment, the ability to adapt to change and embrace flexibility is crucial for long-term survival and growth.                                              | Businesses may need to periodically reassess and adjust their BP to remain relevant and competitive in evolving market conditions.                                                                                                                                                                       |
| 5   | Human capital development             | Becker, B. E., Huselid, M. A.   | 1998 | Investing in human capital through training, development, and talent management initiatives enhances organisational capabilities and competitiveness over the long term.             | Employees deliver the brand promise to customers. Human capital development initiatives should include education on the brand's positioning and values, ensuring that employees understand their role in reinforcing the brand's identity and messaging.                                                 |

Table 1.5 (continued)

| No. | Factors                                  | Author                       | Year | Description                                                                               | Aspect of BP                                                                                                              |
|-----|------------------------------------------|------------------------------|------|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| 6   | Innovation and technological advancement | Damanpour, F., Schneider, M. | 2006 | Continuous innovation and adoption of new technologies are crucial for long-term success. | Innovative solutions that align with the brand's positioning can enhance its relevance and competitiveness in the market. |

These factors interact with one another and are influenced by external and internal dynamics, shaping the long-term trajectory of business development.

Miles and Mangold (2005) have established an association between positioning and firm success in the marketplace by employing an "**employee branding**" positioning strategy. On the other hand, a brand-oriented approach also includes a focus on the **target audience aspect**—how the involved parties perceive and value the brand. The components included in BP, such as competitiveness, differentiation, brand identity, and brand trust, create a brand image that shapes the attitudes of the target audience, influencing the brand's market position through their choices (Kotler, 2016; Wheeler, 2009). By consistently maintaining a strong brand position, a successful brand image provides a long-term competitive advantage.

In recent years, the outcomes of BP have also been revisited in light of digital transformation. Keller (2020) emphasises that the brand resonance model, traditionally centred on loyalty, attachment, and community, must now also capture dimensions of **authenticity and engagement** as critical drivers of consumer–brand relationships. In the digital era, positioning strategies that foster transparent value communication and interactive brand experiences are more likely to sustain loyalty and resonance (Keller, 2020). This extension highlights that positioning outcomes are not static but evolve with changes in consumer expectations and technological environments, reinforcing the need for a dynamic, stakeholder-oriented approach to brand management.

Recent developments in the branding literature increasingly emphasise the role of multi-stakeholder collaboration and **value co-creation** in shaping brand identities. Iglesias and Ind (2020) argue that brand identity is constructed through dynamic interactions between internal and external stakeholders, advocating for a participatory approach to brand building, rather than a top-down one. Similarly, Ranjan and Read (2016) present a rigorously conceptualised model of value co-creation, distinguishing between co-production and value-in-use, and provide a measurement framework to assess this process. These perspectives expand traditional marketing and consumer-based paradigms, suggesting that positioning is not solely a managerial or communicative act, but still a co-creative, relational dynamic emerging from a network of actors.

Another perspective that extends the understanding of BP is the concept of the "**social dilemma**." Van Riemsdijk et al. (2017) demonstrate how consumers often face conflicting values, such as balancing self-interest with societal concerns, when evaluating BP strategies. They indicate that effective positioning can mitigate these tensions by employing reinforcement

strategies that align consumer values with brand promises. While their study focused on animal-friendly product positioning, the underlying principle highlights a broader challenge for brands: reconciling diverse stakeholder expectations.

In addition to traditional and stakeholder-based perspectives, recent research has also begun to explore how data-driven and algorithmic approaches can inform BP. Cancellieri et al. (2023) propose a **“brand network booster”** system that applies semantic network analysis to brand associations, enabling a deeper understanding of brand image and its connectivity within networks of meaning. Similarly, Zhao et al. (2023) develop a dynamic “brand-topic” model that tracks polarity-bearing topics in user reviews, revealing how brand-related sentiment and associations evolve. These studies demonstrate the increasing importance of computational methods in capturing the fluid and multidimensional nature of BP in the digital era.

Taken together, the reviewed factors and perspectives demonstrate that BP is a multidimensional construct that goes beyond consumer perceptions alone. It is closely linked not only to customer attitudes and brand image but also to OP indicators such as profitability, ROI, competitiveness, and brand equity. The literature highlights that successful positioning requires strategic clarity, leadership support, stakeholder alignment, and, increasingly, the ability to integrate data-driven and algorithmic insights into decision-making. These findings reinforce the view that BP should not be treated as a narrow marketing tool but rather as a strategic mechanism that supports long-term growth and economic viability. This also underlines the necessity of embedding BP into the broader framework of SM, which will be the focus of the following section.

### **1.2.3. The impact of brand positioning on organisational performance and organisational sustainability**

Already 3 decades ago, authors stated that the choice of a positioning strategy is significantly correlated with financial performance (Fisher, 1991; McAlexander et al., 1993; Porter, 1996). The studies also later demonstrate the importance of positioning strategies' capability in contributing to firm performance (Hooley et al., 2005; Blankson et al., 2008). Consequently, the greater the emphasis placed on integrating positioning into SM and implementing positioning strategies, the higher the financial performance and competitive advantages.

The findings reveal that while “overall firm objectives” do not relate to any of the sub-positioning strategies, “sales”, “profits”, “ROI”, “market share”, “company image”, and “consumer perceptions” are the six most impacted by positioning strategies. Conclusions and theoretical and managerial implications are discussed (Blankson et al., 2008).

Positioning has a significant impact on a company's financial performance (Blankson et al., 2008; Brooksbank, 1994; Devlin et al., 1995; Ennew & Mirza, 1995; Kalafatis et al., 2000; Kalra & Goodstein, 1998; Suzuki, 2000). Hence, the most crucial decision a firm should make about its brand and product is how to position it.

Several authors (Brooksbank, 1994; Day et al., 1990; Fisher, 1991; Porter, 1996; Urban & Hauser, 1993) are of the view that the long-term success of companies and their products depends on how well they are positioned in the marketplace. Positioning has an impact on crucial consumer-based outcome variables such as higher consumer loyalty, higher brand

equity and value (Knox, 2004; Hartmann et al., 2005), positively shaped preferences and beliefs about brand value, greater willingness to search for the brand (Schiffman and Kanuk, 2007; Trommsdorf & Paulssen, 2005; DiMingo, 1988), perceived price sensitivity (Kalra & Goodstein, 1998), brand affect (Jewell, 2007) and brand salience and recall (Alba and Chattopadhyay, 1986). Effective positioning of the firm's products is crucial for achieving and maintaining superior performance (Cravens and Piercy, 2009).

It has been acknowledged that brand value represents the profit potential of brand assets, mediated by brand market strength (Feldwick, 1996; Kapferer, 2008), indicating its impact on the economic and financial perspective.

A scientific theory confirms that BP affects OP and OS. The relationship between BP, OP, and OS is supported by various marketing and SM theories, as shown in Table 1.6.

Table 1.6

Factors that contribute to brand economic viability and organisational performance (created by the author)

| No. | Factors                           | Author                     | Year         | Description                                                                                                                                                                                                                       |
|-----|-----------------------------------|----------------------------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Resource-based view (RBV)         | Wernerfelt B.<br>Barney J. | 1984<br>1991 | Firms can achieve a sustainable competitive advantage through the acquisition and management of valuable, rare, inimitable, and non-substitutable resources. BP can be considered a strategic resource that influences OP and OS. |
| 2   | Market-based view (MBV)           | Porter M.E.                | 1980         | A firm's performance is determined by industry forces and its position within the industry. Effective BP can differentiate a firm from its competitors, potentially enhancing its performance and sustainability.                 |
| 3   | Stakeholder theory                | Freeman R. E.              | 1984         | Organisations can achieve long-term success by considering the interests of all stakeholders, not just shareholders. A strong BP can improve relationships with stakeholders, which in turn can lead to better OP and OS.         |
| 4   | Corporate identity and reputation | Fombrun C. J.              | 1996         | A well-positioned brand contributes to a strong corporate identity and reputation, which can attract customers, employees, and investors, thereby improving both OP and OS.                                                       |

These theories provide a conceptual foundation for understanding how BP could positively affect OP. However, the specific impact and the mechanisms through which BP influences these outcomes would typically be confirmed through empirical research in the context of individual organisations or industries.

**The impact on positioning, sales and market performance.** BP not only defines how a brand is perceived in the market but also has tangible effects on sales, market share, and price sensitivity. Chaudhuri (2002), in a study published in the *Journal of Advertising Research*, demonstrates that while advertising directly contributes to brand sales, its broader influence on market share and the ability to command premium prices is indirect. These effects are mediated by brand reputation, which functions as a critical strategic asset linking positioning elements to commercial performance. In particular, brand familiarity and perceived brand uniqueness, both central elements of positioning, are identified as the key drivers of reputation. Reputation, in turn, significantly shapes brand sales, market share, and relative price. Advertising can only enhance these outcomes when it builds upon substantial reputational capital. As Chaudhuri (2002) emphasises: “It is only by building reputational capital that firms can command higher market share and premium pricing.”

This underscores the strategic role of brand reputation as a mediator between positioning efforts and measurable business outcomes. It also illustrates that brand reputation, as a facet of brand image (Keller, 2013), is an outcome of long-term positioning consistency and brand trust.

Moreover, empirical meta-analyses by Christodoulides and de Chernatony (2010) and Chatzipanagiotou et al. (2016) further confirm that brand equity functions as a bridging mechanism between internal brand clarity and external consumer behaviour, reinforcing **positioning as a performance-driving capability rather than a static identity element.**

Taken together, these findings support the integration of brand performance elements, such as Brand image, Brand trust, Brand equity, and Value proposition, into the holistic approach of BP. They validate positioning not only as a communicative or creative process but as a strategic and measurable lever that enables brands to achieve superior commercial outcomes.

**The Brand Strength Index (BSI).** BSI, developed by Brand Finance, provides a structured approach for evaluating the link between brand management and OP. It incorporates input measures (such as brand investment and innovation activity), equity measures (including stakeholder perceptions), and output measures (like financial results and customer behaviour), thereby capturing both strategic and operational dimensions of brand impact (Thomson, 2020). This framework supports the notion that BP, when aligned with strong brand management capabilities and stakeholder value creation, can significantly enhance both OP and long-term sustainability. It reflects a diagnostic logic, reinforcing the importance of integrating positioning with capability assessment and market context analysis. As explained by Thomson (2020), the BSI model integrates input, equity, and output metrics to provide a comprehensive view of brand strength.

This multidimensional perspective is well reflected in the Brand Strength Index (BSI) developed by Brand Finance, which offers a structured model for evaluating brand impact across three key areas: inputs (such as marketing investment, innovation spending, and internal brand capabilities), equity (brand familiarity, consideration, and loyalty among stakeholders), and outputs (financial results and customer behaviours). By capturing both the strategic inputs and tangible outcomes, the BSI framework links BP and management actions to measurable business value.

Notably, the BSI approach aligns with the principles of value-based brand management, emphasizing that tracking how each element influences others enables companies to determine the return on investment (ROI) of specific brand-related actions and to diagnose areas where brand support or perception may require improvement. As such, BSI not only complements traditional brand equity measures but also supports strategic brand decision-making and sustainability-oriented planning (Thomson, 2020).

#### **1.2.4. Integrating brand positioning into strategic management**

Considering the previously discussed importance of BP in the context of company strategy, the author examines the significance of integrating BP into SM.

BP is an integral part of SM, as the essence of strategy is choosing to perform activities differently from rivals (Porter, 1996). Today, not only are marketing communications and marketing activities brand-oriented, but there is also an ongoing discussion about the importance of consistency between the company's internal processes, organisational culture, and brand guidelines to ensure a unified and authentic brand concept. In the scientific literature, the importance of BP is often emphasised, not only within the marketing framework but also in the context of business strategy. Aaker and Shansby (1982) claim that product positioning is so central and critical that it should be considered at the level of a mission statement. Dovel (1990) considers positioning as the essence of a business and the backbone of a business plan. Crawford (1985) believes that positioning is intended to drive the entire marketing program of the organisation and views positioning as an integral part of total strategy, not just an advertising ploy. Product, brand, price, promotion, and distribution must all be consistent with the positioning statement. Thus, BP serves as a basis not only for the brand strategy but also for the company's strategy, which outlines a more far-reaching impact on business development. Author of marketing books Neumeier (2005) claims: "If you don't manage your brand with strategy and skill, your brand can easily turn against you. A brand is what customers say it is."

A growing body of recent research underscores the importance of aligning a company's internal culture with its brand guidelines. In particular, internal branding – the process of aligning employees' understanding and behaviour with the organisation's brand values – has been shown to improve brand commitment, citizenship behaviour, and ultimately competitive advantage (Park & Kim, 2024; Ahmed & Hashim, 2022). Park and Kim (2024) demonstrate that public organisations that successfully embed their internal values into daily work processes experience heightened employee engagement and lower turnover intentions, pointing to stronger internal coherence (i.e., alignment of vision, mission, culture, and brand). Similarly, Ahmed and Hashim (2022) model how internal brand management activities, such as communication, training, and leadership, boost intrinsic motivation and strengthen employees' relationships with the brand, thereby supporting sustainable branding and strategic robustness. This internal alignment not only reinforces external consistency but also enables brands to deliver authentic, unified experiences and enhance organisational resilience.

Marketing has become an increasingly important element of the SM process, and the concept of positioning has become fundamental to the success of firms' marketing strategies. However,



it must be recognised that the concept of BP in the business environment is not fully realised, often resulting in a separation and focus on individual positioning elements. Business achievement involves complex, interdependent, or even conflicting tasks. Increasingly, such tasks are undertaken against a backdrop of constant change, intense competition, and limited resources, and marketing strategy has become a vital component of success. A well-considered and effectively implemented marketing strategy should simplify business tasks. Strategy is a series of tools and techniques that guide the organisation to success through a process of understanding and meeting customer needs (Drummond et al., 2008). According to Urde (1999), “The brand is a strategic platform for interplay with the target group and thus is not limited to being an unconditional response to what at any moment is demanded by customers.” This perspective frames the brand not merely as a reactive market tool, but as a proactive and guiding mechanism for strategic interaction with stakeholders. Strategy includes the selection of the company's product market scope (Porter, 1980), and "the company must decide what kind of value it wants to provide to whom" (Porter, 1999). On the other hand, strategy involves pooling its resources and capabilities (Barney, 1991; Prahalad & Hamel, 1990).

A complementary perspective is provided by Grant (1991), who developed a resource-based framework for strategy analysis. This framework emphasises an “inside-out” logic of strategy: organisations begin by identifying and classifying their resources, appraising capabilities relative to competitors, and assessing the rent-generating potential of these resources. Strategy is then formulated to exploit these capabilities, while resource gaps are identified and replenished to sustain long-term performance (see Fig. 1.6).

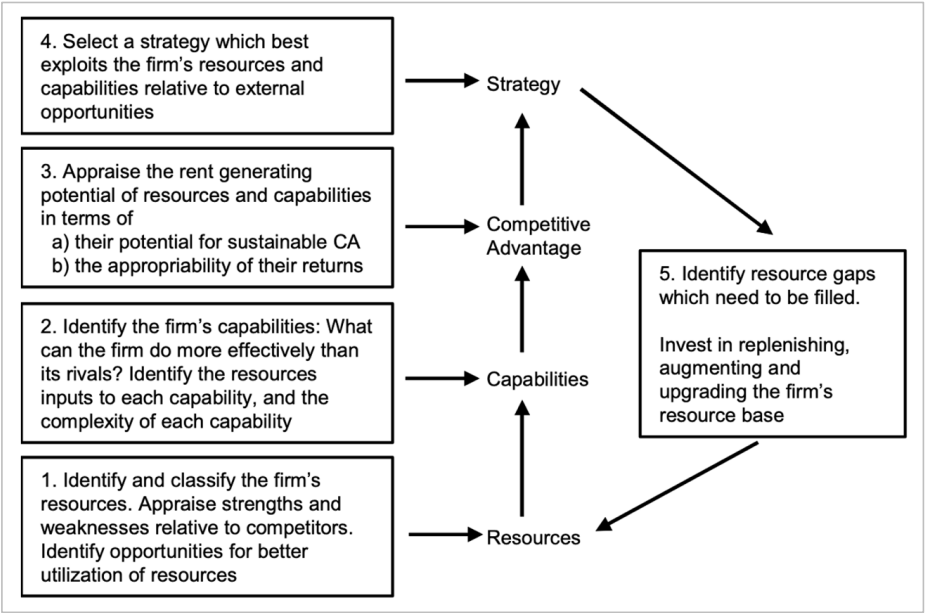


Fig. 1.6. A resource-based approach to strategy analysis: a practical framework (Grant, 1991).

From this viewpoint, BP can be conceptualised as both a strategic resource (embedded in the firm’s identity, values, and intangible assets) and a dynamic capability (driving differentiation,

adaptability, and market relevance). The RBV logic thus reinforces the role of BP as a critical component of SM, linking internal strengths to competitive advantage and sustainable growth. The subsequent parts of the Doctoral Thesis will further examine the conceptual elements of BP and construct a holistic, multidimensional model. This framework aims to operationalise positioning in an SM context.

### 1.2.5. Principles of successful brand positioning

Effective positioning is a critical component of a business's long-term success and sustainability. When a company successfully positions itself in the marketplace, it can lead to a range of benefits that directly impact its performance and sustainability.

**Differentiation.** Effective positioning sets a business apart from its competitors by highlighting its unique value proposition and benefits. This differentiation can lead to a competitive advantage and the ability to command premium pricing. Competitive advantage is the foundation of superior performance, and understanding the anatomy of competitive advantage is critical for general managers who bear primary responsibility for the long-term survival and success of a company (Ma, 1999). It is suggested that a company needs a rationale to justify its existence, and this rationale is cited as creating value better than competitors can, contributing to society in ways that are unique and irreplaceable. These are all critical questions that address many facets of the anatomy of competitive advantage.

Differentiation, a core element of BPP, directly influences value proposition and pricing strategy. By looking at the reference value, which is the price of offerings that satisfy the same need as yours and adding and/or subtracting the differentiation value of the offering, you get the economic value of that offering (Nagle et al., 2011). For an estimated economic value, see Fig. 1.6. Additionally, the sales force will have all the right tools and arguments to communicate the values to the customer. The differentiation value can be anything that offers increased performance, reduced costs, or both when compared with the customer's best alternative (Farres, 2012). This will result in an estimation of the economic value of a product based on customer value (Hinterhuber, 2008).

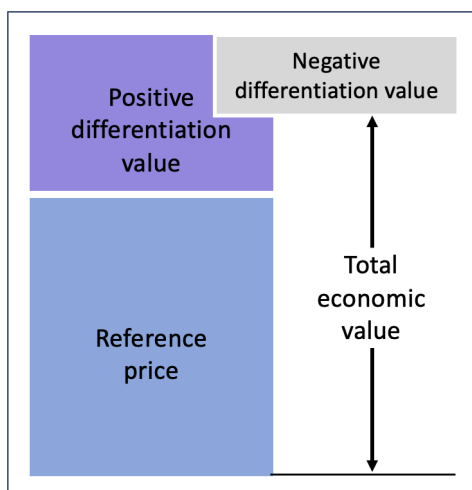


Fig. 1.7. Estimated economic value (Nagle et al., 2011).

As reflected in Fig. 1.7, the differentiation value plays a crucial role in determining the price, which in turn affects the company's profit margin and market competitiveness. The diagram illustrates the concept of Total Economic Value, which is composed of a Reference Price (the baseline price of the closest alternative) and the net Differentiation Value, which can be either positive or negative (Nagle et al., 2011). A positive differentiation value indicates that customers perceive the offering as superior to alternatives and are willing to pay a price premium. Conversely, a negative differentiation value signals a perceived inferiority or lack of recognisability, which forces the company to compete primarily on price.

This has important implications for market entry and export contexts, where brands often begin with a negative differentiation value by default due to low brand awareness or a lack of perceived added value in unfamiliar markets. In such cases, the company must actively build positive differentiation – through strategic BP, clear communication of value proposition, and trust-building efforts – to justify a price above the reference level and improve profitability.

Effectively, BP directly shapes the perceived differentiation value, thereby enabling pricing strategies that reflect more than cost-based logic and support sustainable export growth.

**Innovation.** Innovation has become a critical strategic dimension in ensuring sustainable brand differentiation and market relevance. In the context of successful BP, innovation is not viewed as a separate or parallel activity but as a direct outcome of coherent and value-driven positioning strategies (Kapferer, 2012; Urde, 2003). A strong and clearly articulated BP framework provides the structural foundation for innovation by guiding product development, communication, and experience design in line with the brand's identity and values (Keller, 2013).

Contemporary research suggests that brands with strong positional clarity are better equipped to generate innovations that align with stakeholder expectations and foster long-term engagement. Positioning based on purpose and values enables brands to identify opportunities for innovation that go beyond functional benefits and address deeper emotional and social needs (e.g. Kapferer, 2012; Keller, 2013). This is particularly evident in the emergence of values-based innovation, where the brand's strategic orientation is directly informed by shared values and stakeholder co-creation (Strausa, Ence & Gaile-Sarkane, 2023). The positioning acts as a catalyst for innovation. When brands apply the principles of BP early in the innovation process – through audience alignment, identity clarity, and value proposition definition – the resulting innovations are more consistent with the brand's strategic intent and more likely to succeed in the market (Strausa, Ence & Gaile-Sarkane, 2022).

Furthermore, internal branding plays a key role in facilitating innovation by ensuring that employees understand and support the brand's positioning. Internal alignment contributes to innovation effectiveness and strengthens the consistency of the brand's market expression (e.g. Urde, 2003; Ind, 2003; Ahmed & Hashim, 2022). In this way, positioning bridges internal capabilities and external expectations, enabling innovation to emerge from within the organisation's cultural and strategic framework.

Recent research reinforces the view that innovation contributes not only to product or BD but also to broader business growth, including export performance. Innovations that offer strategic or operational advantages are increasingly recognised as enablers of competitiveness in

international markets. Empirical evidence suggests a positive relationship between innovation and exporting, with particular emphasis on the role of marketing innovation and innovation variety as critical factors influencing export readiness and success (Altuzarra et al., 2023). Moreover, studies show that export market participation can itself stimulate innovation activity, creating a mutually reinforcing dynamic between innovation capacity and international expansion (Salomon & Jin, 2010). In addition, firms that integrate innovation with environmental information disclosure tend to achieve better financial results, highlighting that innovation aligned with transparency and sustainability creates added value for both stakeholders and OP (Xie et al., 2022).

Innovation represents not only an outcome of strong positioning but also a fundamental principle of successful brand strategy. When aligned with a brand's identity, purpose, and stakeholder values, innovation reinforces differentiation, enhances market relevance, and contributes to sustainable competitive advantage.

**Unrepeatability of positioning.** Unrepeatability is a key principle in strategic BP, particularly for ensuring long-term differentiation and competitive sustainability. According to Keller et al. (2002) and Keller (2003), a sustainable brand position should be defensible, resistant to imitation, and pre-emptive – creating a space in the consumer's mind that is difficult for competitors to occupy. Ideally, a brand's positioning should be difficult to replicate (Cravens, 2000; Evans et al., 1996), and it should confer a lasting differential advantage (Czepiel, 1992; de Chernatony, 2010).

Pham and Muthukrishnan (2002) argue that positioning decisions should consider not only current favourability but also the brand's capacity to adapt to future challenges. While attributes such as favourability, differentiation, and credibility can be assessed cross-sectionally, the sustainability of a positioning strategy can only be validated a posteriori through longitudinal data (Dillon et al., 2001; Keller, 2003). Nevertheless, the uniqueness dimension of positioning allows marketers to make informed inferences about the potential longevity of a brand's competitive advantage.

From an SM perspective, the principle of unrepeatability also contributes to brand equity and consumer loyalty. A unique positioning that remains resilient against competitive erosion strengthens brand consistency and reinforces consumer trust (Aaker, 1996; Kapferer, 2012). In this regard, positioning must not only be meaningful and relevant, but also distinct and difficult to imitate – a condition that requires strategic focus and continuous adaptation to market dynamics.

**Targeted marketing.** A well-defined positioning strategy helps a business identify and target its ideal customers. By understanding the needs and preferences of its target audience, the company can create more effective marketing campaigns that resonate with potential buyers. The better a brand serves a consumer's goal, the higher the expected reward. Barden (Barden 2013) recommends basing positioning on a category goal. The brand that owns the dominant goal will win. If explicit superiority is not possible, it is necessary to create differentiation with indirect goals. According to Barden, successful propositions link both. Barden emphasises that it is essential to transfer the brand's position into specific, target audience-directed signals that

activate the goal within the mind of the consumer. All communication must address a single, unified goal – if signals align with this goal more effectively than those of competitors, the brand will be purchased.

A well-defined positioning strategy helps a business identify and target its ideal customers. By understanding the needs, aspirations, and preferences of its target audience, a company can create more effective marketing campaigns that resonate with potential buyers and generate long-term engagement. Positioning enables the brand to focus on delivering value that is relevant to a specific audience segment, rather than adopting a broad or diluted communication approach (Kotler & Keller, 2016).

In this context, goal-oriented positioning has gained increasing relevance. Barden (2013) emphasises that brands should define their positioning based on a dominant category goal – the primary need that consumers seek to fulfil when purchasing within a given category. He argues that “the brand that owns the goal, wins” (Barden, 2013). This means that when a brand aligns itself explicitly with the most relevant goal of the category, it gains a competitive advantage in the consumer’s mind. According to Barden, when explicit superiority is not achievable, brands can still differentiate by associating with indirect goals, thus anchoring themselves in alternative but meaningful consumer motivations. A successful positioning strategy, therefore, links both the brand’s value proposition and the consumer’s goal, creating a coherent and emotionally resonant narrative.

Furthermore, Barden underlines the importance of signal alignment – the consistent transfer of the brand’s position into clear, targeted signals that activate the desired goal in the consumer’s mind. All brand communication must consistently support the same single goal; otherwise, the consumer’s attention and association may be diluted. If the brand’s signals align more closely with the goal than those of its competitors, it is more likely to be chosen.

Such targeted positioning not only enhances marketing effectiveness but also increases ROI by ensuring that messaging, channel strategies, and product offerings are tailored to the intended audience (Christodoulides & de Chernatony, 2010). The ability to link brand attributes to a specific consumer motivation reinforces brand relevance and enhances brand strength.

**Customer trust and brand loyalty.** When a business consistently delivers on its brand promises, it fosters not only customer satisfaction but also long-term brand loyalty. A well-positioned brand that aligns its value proposition with customer expectations builds trust and credibility, resulting in greater customer retention and increased lifetime value (e.g. Keller, 2013; Chaudhuri & Holbrook, 2001). As brand trust accumulates through repeated positive experiences, customers become less price-sensitive and more likely to engage in repeat purchases and brand advocacy (Morgan & Hunt, 1994).

BP plays a critical role in shaping consumer perceptions of reliability and authenticity. When a brand communicates a clear, relevant, and differentiating message and consistently delivers on it, trust is reinforced (Delgado-Ballester & Munuera-Alemán, 2005). Trust, in turn, enhances brand attachment and resilience, making customers more likely to explore new products or services from the same brand (Dwivedi et al., 2021).

This relational capital enhances a brand’s ability to expand into new categories or markets, leveraging its existing emotional equity and consumer confidence. A well-established brand

image, built through effective positioning, serves as a platform for market expansion, allowing the brand to grow horizontally (across categories) or vertically (into new segments) with reduced risk and marketing costs (e.g., Aaker, 1996; Kapferer, 2012).

Moreover, strong BP enhances resilience to economic fluctuations. Brands that have cultivated emotional connection and perceived value tend to retain customer loyalty even during economic downturns, as customers rely on trusted brands for consistency and reassurance (e.g., Chaudhuri, 2002; Keller, 2013). Emotional loyalty becomes a buffer against switching behaviour prompted by price competition or uncertainty.

From a business sustainability perspective, BP serves as a strategic tool for long-term growth and stability. It secures recurring revenue streams by establishing a loyal customer base that drives consistent demand (Urde, 2003). Sustainability, in this context, extends beyond environmental or social responsibility – it includes the brand's ability to maintain competitive advantage, economic performance, and stakeholder trust over time (Baumgartner & Ebner, 2010).

Effective positioning is not merely a marketing instrument – it is a strategic foundation for OP, customer relationship management, innovation, and sustainability. It ensures coherence between the brand's identity, internal capabilities, and market expectations, enabling businesses to thrive in dynamic environments.

The above discussion demonstrates that effective BP is not merely a marketing instrument – it serves as a strategic foundation for organisational operations, customer relationship management, innovation, and long-term sustainability. It ensures coherence between brand identity, internal capabilities, and market expectations, enabling organisations to adapt and thrive in dynamic environments.

#### **1.2.6. Limitations of existing brand positioning approaches**

Despite the richness of conceptual and practical insights on BP, several critical issues remain unresolved in both academic and applied contexts. One of the most prominent challenges is the dichotomy between functional and emotional positioning approaches. Functional positioning focuses on tangible product attributes such as quality, features, performance, or price, while emotional positioning aims to create affective bonds, symbolic associations, and personal relevance in the minds of consumers (e.g., Aaker, 1996; Keller, 2003; Kapferer, 2012).

However, these two approaches are often treated as mutually exclusive in many traditional models. For instance, early models such as Ries and Trout's (1981) positioning theory emphasised the importance of owning a functional concept or word in the consumer's mind (e.g., "safety" for Volvo). In contrast, later frameworks, like Aaker's (2012) or Marketing 3.0 and 4.0 by Kotler et al. (Kotler et al., 2017), emphasised emotional and values-based connections. In practice, brands that rely solely on emotional claims without delivering on functional promises risk creating dissonance and eroding trust. Conversely, overly rational positioning can fail to build strong customer loyalty or long-term brand equity in saturated markets.

Furthermore, several models are based on static assumptions of brand identity and market context. For example, the Brand identity planning model (Aaker, 1996) provides a structured

but relatively linear framework. It lacks mechanisms for adapting positioning over time, especially in turbulent or value-driven markets. Similarly, Keller's Customer-based brand equity model (2001) is influential in defining brand salience and resonance, but it provides limited guidance on managing positioning across different cultural, ethical, and stakeholder contexts.

From a managerial perspective, companies often struggle to operationalise these models consistently. Many brands struggle to align their internal culture with external messaging or sustain their positioning across product lines, markets, and over time. Real-world failures – such as Pepsi's ill-fated 2017 "Live for Now" campaign (BBC, 2017; Vranica, 2017), which was perceived as tone-deaf and inauthentic – illustrate the consequences of emotionally driven positioning that lacks grounding in authentic brand identity and stakeholder alignment.

Scholars have emphasised the growing need for adaptive, value-integrated positioning models that can operate in increasingly complex and digitised environments. For instance, Chen et al. (2022) argue that BP in digital ecosystems must incorporate stakeholder-driven meaning creation and ethical coherence. Likewise, Müller and Li (2023) highlight that artificial intelligence, and real-time analytics are transforming the formation of brand perceptions, calling for models that reflect fluid, co-created, and evolving brand identities.

The author sees a need for a holistic approach to BP in order to

- integrate both functional and emotional positioning dimensions into a single system;
- provide a dynamic framework that accounts for internal capabilities, external market pressures, and changing stakeholder values;
- ensure alignment between brand identity, delivery, and perceived value;
- support continuous adaptation and repositioning, not just initial market entry.

This would overcome the fragmentation of previous models and provide a valuable tool that is both strategically sound and operationally useful in a real business environment.

### 1.3. Scientific gap and problem statement

Despite extensive research in branding and marketing strategy, the concept of BP remains theoretically fragmented and practically inconsistent. Over the past three decades, BP has evolved into a central concept in brand management and strategic marketing. Numerous conceptual frameworks have been developed, including Brand concept management (Park et al., 1986), the Brand identity planning model (Aaker, 1996), the Customer-based brand equity model (Keller, 2001), the 3i model (Kotler et al., 2010), and the Brand hexagon (Urde, 1999). While each of these models contributes to understanding BP, most approach the concept from isolated or partial perspectives.

**Theoretical gap.** The literature lacks an integrated, holistic model that systematically links BP with SM. Existing models tend to focus on individual aspects of BP, such as differentiation (Aaker, 1996), emotional branding (Keller, 2001), or internal value alignment (Urde, 2003), without offering a comprehensive and integrated approach. Among the nine analysed models, none incorporate both internal brand-building logic and external strategic drivers within a unified framework. Furthermore, BP is rarely conceptualised as a multidimensional construct

that includes strategic objectives and measurable business outcomes. The lack of integration among these components limits the applicability of existing models in dynamic business environments and in scenarios for sustainable growth. In addition, empirical validation of these models remains limited, particularly regarding how positioning decisions translate into OS, OP, and competitive advantage.

This theoretical gap highlights the need for a more integrated and practically applicable BP model. Based on the reviewed literature and the identified conceptual limitations, the study provides an analytical examination of the key factors and components influencing BP. This analysis serves as the foundation for the conceptualisation of a holistic approach to brand positioning.

**Practical gap.** In practice, BP is often treated as a tactical or communication-related activity rather than as a strategic mechanism embedded in organisational development and long-term planning. Such a narrow operationalisation constrains the potential of positioning to influence performance, stakeholder relationships, and sustainable value creation. Organisations lack a structured, practically applicable model that connects business strategy to BP, stakeholder expectations, and performance indicators. As a result, many firms struggle to manage positioning as a continuous, adaptive, and value-generating process.

Moreover, only a limited number of studies have examined the relationship between OS and higher levels of OP, and how BP, when effectively implemented, contributes to both performance and long-term sustainability outcomes. Existing research rarely conceptualises positioning as a systemic driver that extends beyond marketing boundaries and directly supports sustainable growth trajectories. Furthermore, prior studies indicate that the impact of BP on OS depends on the degree of strategic integration—namely, the extent to which positioning is embedded within broader strategic management and decision-making systems. The lack of research from this perspective, particularly incorporating insights from senior executives and company owners who directly shape strategic integration, reveals a significant gap in understanding BP's long-term value-creation potential.

This conceptual gap defines the scientific problem addressed in this Doctoral Thesis: although brand positioning is widely recognised as a critical component of competitive strategy, its holistic integration into strategic management processes and its impact on sustainable organisational performance remain insufficiently explored and empirically validated. To address this problem, the study proposes and validates the HBPM – a multidimensional framework that links internal brand logic, stakeholder relationships, and external market dynamics. By empirically testing the interactions among BP, SM, OS, and OP, the research develops a model demonstrating how BP, when strategically integrated into SM processes, can enhance organisational performance and sustainability outcomes. The study's methodological approach, based on a triangulated research design and multi-level empirical validation, ensures both the theoretical robustness and practical relevance of the developed HBPM.



## 1.4. Summary of theoretical foundations and conceptual logic

The preceding theoretical review has revealed that BP is a complex and multidimensional construct, shaped by various perspectives in the academic literature and business practice. The analysis of over 31 definitions, historical evolution, and leading BP models demonstrates that positioning is not only a communication tool but a strategic framework that affects brand perception, business performance, and long-term sustainability.

Despite the conceptual richness, existing approaches tend to be fragmented, lacking integration between internal brand identity, external stakeholder expectations, and outcome-oriented metrics. Based on the reviewed literature, several key dimensions and categories emerge as foundational for building a holistic BP framework. Table 1.7 below summarizes the main positioning dimensions derived from definitions, models, and strategic perspectives, and links them to the research aim of developing a new holistic model. These elements serve as the conceptual scaffolding for the analytical and empirical parts of the Doctoral Thesis.

Table 1.7

Summary of brand positioning dimensions and conceptual structure (created by the author)

| Positioning Dimension          | Core Aspects                                                                 | Derived from                                                                                                       | Relevance for holistic approach                   |
|--------------------------------|------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| <b>External influences</b>     | Market context, competition, cultural trends, digitalisation, sustainability | Porter (1980); Ries & Trout (1981); Keller (2013); Kotler et al. (2010); Ma (1999); Wheeler (2012)                 | Defines positioning constraints and opportunities |
| <b>Internal brand identity</b> | Brand mission, values, personality, organisational culture                   | Aaker (1996, 2012); Urde (1999, 2003); Kapferer (1992, 2012); Tomiya (2010); Schiffman et al. (2014)               | Ensures authenticity and internal alignment       |
| <b>Customer perception</b>     | Brand image, associations, trust, relevance, loyalty                         | Keller (2001, 2008, 2013); Aaker (1996); Ligas & Cotte (1999); Temporal (2002); Trout (2003); Florin et al. (2007) | Determines positioning effectiveness              |
| <b>Strategic objectives</b>    | Differentiation, competitive advantage, growth, innovation                   | Aaker & Shansby (1982); Ma (1999); Porter (1996, 2008); Keller et al. (2002); Kotler (2016)                        | Aligns brand position with business strategy      |
| <b>Business outcomes</b>       | Performance, equity, sustainability, resilience                              | Hooley et al. (2005); Blankson et al. (2008); Chaudhuri (2002); Urde (2003); Kapferer (2008); Farres (2012)        | Justifies BP as a value-creating tool             |

This conceptual summary outlines the logical foundation for the new holistic model, which will be developed based on these five interrelated dimensions. Each of them will be further analysed in Chapter 2 to refine the structure and relationships between components, and to operationalise the variables for empirical validation.

The theoretical framework and literature review demonstrate that BP is a conceptually rich but fragmented, theoretically diverse field, with multiple definitions, conceptual perspectives, and strategic models that often emphasise isolated elements such as differentiation, perception, or identity. While these contributions provide valuable insights, they typically lack an integrated approach that connects internal brand logic with external market dynamics and long-term business outcomes.

Existing frameworks rarely address positioning as a dynamic, value-driven, and organisation-wide process. The need for a more holistic understanding has been further amplified by recent trends such as digital transformation, stakeholder co-creation, and values-based branding.

Based on this synthesis, the Doctoral Thesis identifies five core dimensions that underpin an integrated BP logic – external influences, internal brand identity, customer perception, strategic objectives, and business outcomes. These dimensions serve as the conceptual basis for the analytical and empirical work presented in the following chapters.

## **2. ANALYSIS OF FACTORS AND COMPONENTS INFLUENCING BRAND POSITIONING**

Building on the theoretical foundations established in Chapter 1, this chapter focuses on the analytical examination of BPE and conceptual components. While the theoretical part identified definitional diversity, model fragmentation, and the lack of a unified positioning framework, the present chapter seeks to synthesise key BP dimensions using structured qualitative analysis. The main objective of this chapter is to develop an evidence-based analytical foundation for the construction of a new holistic model and to support the formulation of research hypotheses for empirical validation.

To achieve this, the chapter employs a qualitative content analysis methodology, grounded in the frameworks of Elo & Kyngäs (2008) and Mayring (2014). The analysis follows an inductive approach and includes

- A content analysis of 31 BP definitions, with binary matrix construction and element clustering.
- An examination of 56 theoretical citations and sources, coding for 11 identified positioning elements and mapping their influence domains (market, brand, customer).
- A classification and attribute-based evaluation of nine BP and branding models, assessing their logic, structure, and methodological orientation.
- A conceptual interpretation of BP through the lens of the “Theory of Marketing” (Lüdicke, 2015), as well as brand-customer interaction and decision-making logic.

The analytical process integrates inductive grouping, element frequency analysis, and domain-based interpretation, enabling the author to organise and visualise positioning components by their function, stakeholder alignment, and strategic purpose. Visualisations, frequency charts, and matrix-based tables support the clarity and replicability of the findings.

These results form the basis for constructing the holistic BP approach, as well as for developing conceptual frameworks such as the Decision-making interaction model, the Brand-stakeholder interaction model, and the Brand-customer touchpoint framework. The findings also support the development of five hypotheses that link BP with OP, OS, and SM.

Overall, this chapter provides the analytical bridge between theoretical synthesis and empirical testing, ensuring methodological coherence, conceptual depth, and a structured foundation for the empirical part of the Doctoral Thesis.

### **2.1. Qualitative content analysis of elements of brand positioning definitions**

To explore how BP is conceptualised across academic and practitioner literature, a qualitative content analysis was conducted on a sample of 31 definitions. This analysis aimed to identify the key elements commonly used to define BP and to provide a structured basis for further theoretical development and model construction.

The methodological approach followed an inductive framework based on the principles proposed by Elo and Kyngäs (2008) and Mayring (2014), ensuring systematic, transparent, and replicable procedures. The analysis consisted of three main phases:

### 2.1.1. Initial review and open coding.

Each definition was carefully read and examined for semantically relevant segments. Words or phrases indicating distinct concepts (e.g., “differentiation”, “perception in the mind”, “brand identity”, etc.) were identified and coded as first-level conceptual indicators.

To structure the results of the content analysis and facilitate further theoretical synthesis, six conceptual groups were identified based on recurring themes across the 31 BP definitions. These categories reflect both classical and emerging dimensions of BP (see Table 2.1).

Table 2.1

Refinement of conceptual group labels for brand positioning elements (created by the author)

| No. | Grouped elements                                             | Refined conceptual label       |
|-----|--------------------------------------------------------------|--------------------------------|
| 1   | Mind of consumer                                             | Customer perception            |
| 2   | Differentiation / Competition / Unique Offer                 | Competitive differentiation    |
| 3   | Values / Needs / Connection                                  | Value and relevance alignment  |
| 4   | Brand identity / Self-concept / Self-image / Self-expression | Internal brand identity        |
| 5   | Segment placement                                            | Target segment orientation     |
| 6   | Image / Symbols                                              | Symbolic and visual expression |

The identified codes are grouped into broader conceptual categories based on thematic similarity

1. **Customer perception** refers to the mental image or position the brand occupies in the consumer’s mind, which is the foundational objective in many traditional positioning approaches.
2. **Competitive differentiation** captures the brand’s unique offer, distinctiveness, and its ability to stand out in a competitive environment.
3. **Value and relevance alignment** addresses how the brand resonates with customer values, emotional needs, and expectations, highlighting the increasing importance of personalisation and meaningful engagement.
4. **Internal brand identity** includes elements related to the brand’s essence, mission, and its role as a tool for customer self-expression and identity reinforcement.
5. **Target segment orientation** represents the alignment of positioning with specific consumer segments, reflecting strategic targeting decisions.
6. Finally, **Symbolic and visual expression** encompasses the brand’s symbolic language, visual identity, and imagery used to create emotional and associative meaning.

These six categories form the analytical foundation for the subsequent conceptual modelling.

### 2.1.2. Frequency mapping.

A binary coding matrix was created, indicating the presence (1) or absence (0) of each element in every definition. This allowed the author to calculate frequencies for each conceptual element across the dataset and to identify the most dominant themes. The resulting categories and frequencies are seen in Table 2.2.

Table 2.2

Frequency of brand positioning element groups across 31 definitions (created by the author)

| Element group                  | Frequency | % of definitions (N=31) |
|--------------------------------|-----------|-------------------------|
| Customer perception            | 23        | 74.2 %                  |
| Competitive differentiation    | 17        | 54.8 %                  |
| Value and relevance alignment  | 11        | 35.5 %                  |
| Internal brand identity        | 9         | 29.0 %                  |
| Target segment orientation     | 5         | 16.1 %                  |
| Symbolic and visual expression | 4         | 12.9 %                  |

The frequency analysis of coded elements across 31 BP definitions reveals that the most dominant themes are customer perception (present in 74.2 % of definitions) and competitive differentiation (54.8 %). These elements represent the core of traditional positioning logic, where perception and competitive distinction are central.

Meanwhile, concepts related to value and relevance alignment (35.5 %) and internal brand identity (29.0 %) are moderately represented, indicating a shift toward more human-centric and identity-driven approaches. Less frequent are references to target segment orientation (16.1 %) and symbolic and visual expression (12.9 %), suggesting underrepresentation of emotional and symbolic dimensions in classical definitions. The full coding matrix and frequency table based on the 31 analysed definitions are available in Appendix 1, and results are visualised in Fig. 2.1.

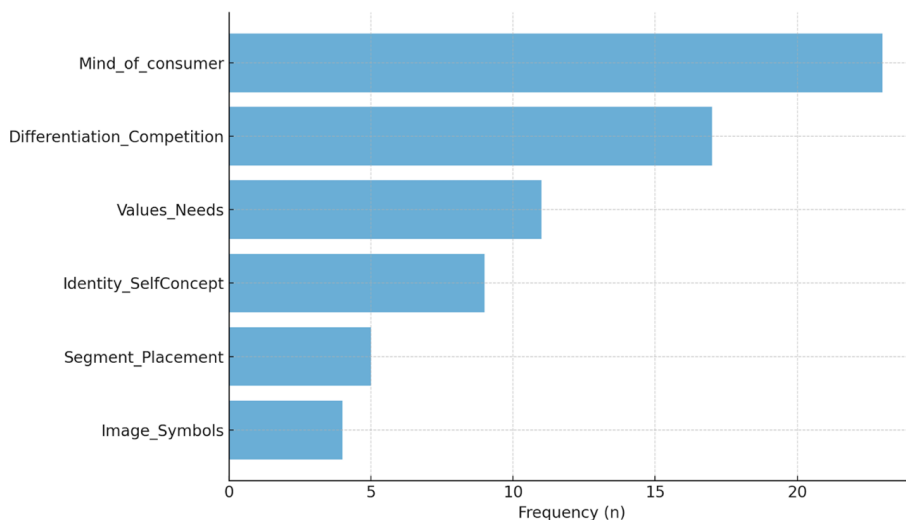


Fig. 2.1. Frequency of brand positioning elements in 31 definitions (author's developed framework).

These insights provide the conceptual basis for further analysis of theoretical perspectives and for identifying structural elements to be included in the new holistic model.

This foundational analysis serves as the basis for the following section, which extends the inquiry into theoretical sources and explores the elements of theories, citations about BP.

## **2.2. Qualitative content analysis of elements of theories, citations about brand positioning, and analysis of the impact of elements on objects**

To deepen the understanding of the structure and function of BP, this section examines how key positioning elements are represented and conceptualised in theoretical literature. BP is approached not only as a communicative message but as a strategic construct comprised of core conceptual elements that influence brand-building across multiple levels.

A qualitative content analysis was conducted based on 56 theory-based citations and conceptual statements collected from academic sources (see Appendix 2). This analysis aims to identify which positioning elements appear most frequently in theoretical models and how they are interpreted concerning strategic BD. As a result, eleven distinct elements were identified: 1) Brand differentiation, 2) Competition, 3) Brand perception in the minds of consumers, 4) Brand identity, 5) Adaptation to individual needs, 6) Benefits evaluated, 7) Relation, Synergy, Communication, 8) Compliance with the self-image, 9) Product attributes, 10) Symbolism, and 11) Knowledge of trends.

The analysis follows a structured sequence. First, a frequency analysis is performed to evaluate the prevalence of each element across the sources. Then, in order to interpret their strategic relevance, the elements are mapped to one of three influence domains – market, brand, and customer. This step helps to clarify the conceptual focus and functional orientation of each element. Finally, the elements are grouped into six overarching conceptual categories, following the same categorisation logic used in Section 2.1 (definition-based analysis). This integrated analytical framework ensures continuity between theoretical and definitional perspectives, serving as a conceptual foundation for the development of BP's holistic approach.

**A qualitative content analysis.** A complete list of analysed theoretical excerpts and citations, including the assigned conceptual elements for each, is provided in Appendix 2. This appendix presents the results of a qualitative content analysis of theoretical citations and statements related to BP.

Table 2.3 presents the frequency with which each conceptual element appears across 56 theory-based citations and sources. The most common elements relate to differentiation, competition, and perception, while symbolic and adaptive components are mentioned less frequently.

Table 2.3

Frequency of brand positioning elements in theoretical sources (N = 56) (created by the author)

| Element                  | Frequency | % of sources (N = 56) |
|--------------------------|-----------|-----------------------|
| Brand differentiation    | 21        | 37.5 %                |
| Competition              | 18        | 32.1 %                |
| Brand perception         | 16        | 28.6 %                |
| Brand identity           | 13        | 23.2 %                |
| Adaptation to needs      | 13        | 23.2 %                |
| Benefits evaluated       | 12        | 21.4 %                |
| Relation / communication | 7         | 12.5 %                |
| Self-image alignment     | 4         | 7.1 %                 |
| Product attributes       | 4         | 7.1 %                 |
| Symbolism                | 2         | 3.6 %                 |
| Trend awareness          | 2         | 3.6 %                 |

The qualitative content analysis of 56 theoretical citations and sources reveals that Brand differentiation (37.5 %) and Competition (32.1 %) are the most frequently referenced elements in BP theory. These are closely followed by Brand perception (28.6 %), Brand identity, and Adaptation to needs (both 23.2 %), which together form the core of traditional positioning logic.

Benefits Evaluated appears in 21.4 % of sources, indicating moderate attention to value-based considerations. In contrast, symbolic and emotional constructs such as Relation / Communication (12.5 %), Self-image alignment (7.1 %), Product attributes (7.1 %), Symbolism (3.6 %), and Trend awareness (3.6 %) are referenced far less frequently.

This distribution suggests that BP is still predominantly framed as a rational, functional, and competitive construct in the academic discourse. Symbolic, emotional, and adaptive dimensions – though increasingly relevant in practice – remain underdeveloped in theory. This disparity indicates that academic models still emphasise rational, functional logic, while practical brand building increasingly relies on emotional engagement, symbolic associations, and adaptability to consumer values and market changes.

### 2.2.1. Frequency analysis

Differentiation and Competition emerge as the most referenced elements, followed by Perception in mind, Brand identity, and Adaptation to individual needs. Fig. 2.2 visualises the frequency of each conceptual element identified in theoretical citations.

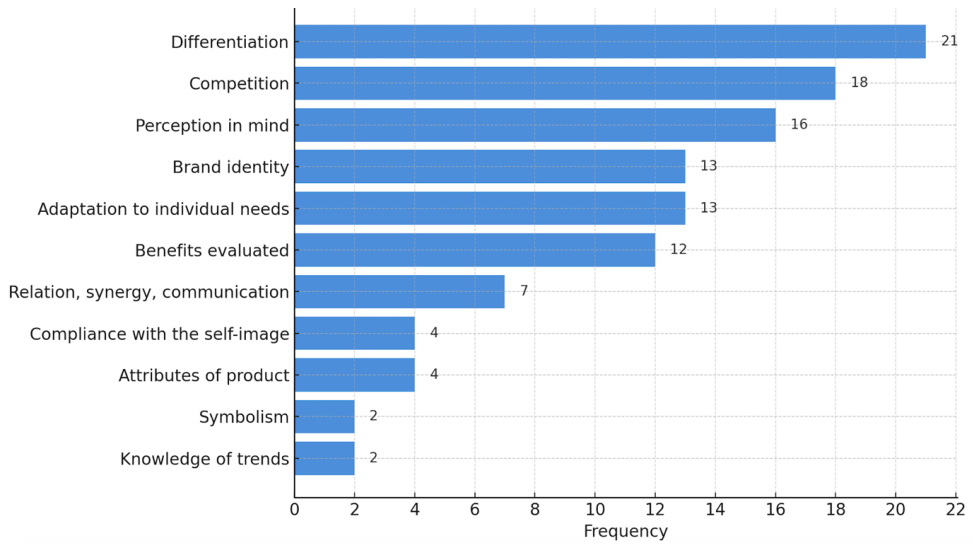


Fig. 2.2. Frequency of theoretical brand positioning elements (N = 56) (author's developed framework).

The percentage of BPE (Fig. 2.3) reflects six main elements: Differentiation 19 %, Competition 16 %, Brand perception in the minds of consumers 14 %, Brand identity 13 %, Adaptation to individual needs of the target audience 12 %, and benefits evaluated (11 %). On the other hand, such positioning elements as Knowledge of trends (2 %) and Symbolism (2 %) were found to be the least in the study.

Trend knowledge is theoretically underemphasised, yet increasingly necessary in a digital and value-based market environment (Kotler et al., 2017; Holt, 2016; Gensler, 2013). Similarly, the symbolic function of brands – their capacity to become carriers of cultural or personal meaning – is well-established in consumer behaviour research but still marginal in positioning theory (Aaker, 1996; Kapferer, 2012; Escalas & Bettman, 2005).



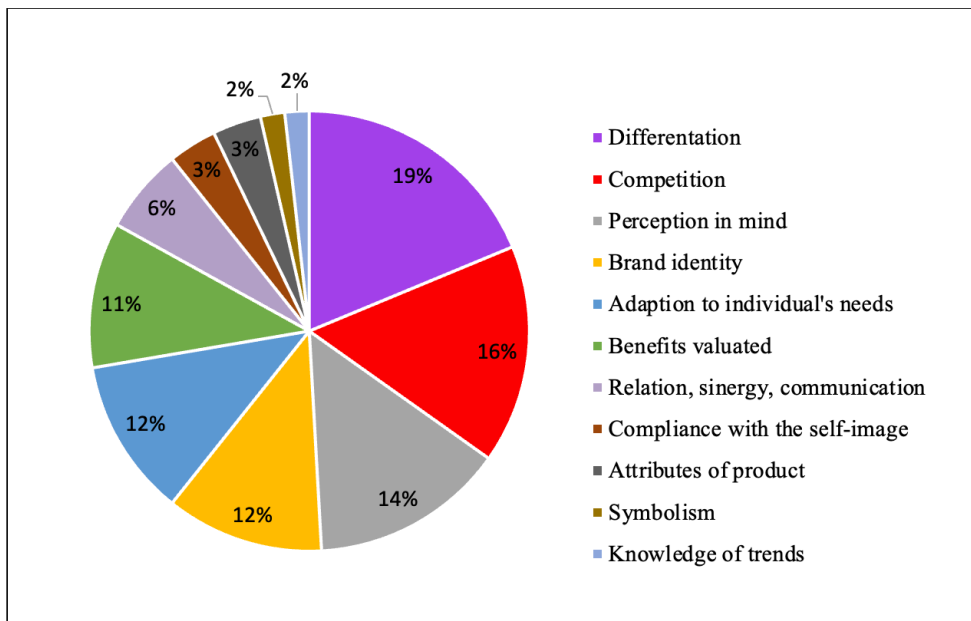


Fig. 2.3. Proportional share of brand positioning elements based on frequency of mentions (author's developed framework).

These findings are consistent with the definition analysis presented in Section 2.1, where similar thematic patterns were identified. Together, the results highlight a conceptual imbalance that supports the need for a more integrated and multidimensional positioning framework – one that reflects not only differentiation and perception, but also values, identity, stakeholder dynamics, and long-term brand relevance.

### 2.2.2. Influence domain mapping

Building on the frequency analysis, the elements are then mapped to three influence domains (market, brand, customer) to explore their functional role in positioning.

Based on the conceptual logic, the identified elements are attributed to the respective domains of positioning influence: market, brand, and customer (see Table 2.4). The market directly determines differentiation and competition, the brand influences the brand identity, symbolism (visualisations), knowledge of trends and product attributes, while the customer forms the perception of the brand in the mind, evaluates the correspondence of the offer and the brand to individual needs, evaluates the benefits, and also determines the correspondence of the brand to the self-image.

Table 2.4

Compliance of brand positioning elements with the object of influence (created by the author)

| Category           | Total | Category relevance |
|--------------------|-------|--------------------|
| Differentiation    | 21    | marketplace        |
| Competition        | 18    | marketplace        |
| Perception in mind | 16    | customer           |

Table 2.4 (continued)

| Category                         | Total | Category relevance |
|----------------------------------|-------|--------------------|
| Brand identity                   | 13    | brand              |
| Adaptation to individual needs   | 13    | customer           |
| Benefits evaluated               | 12    | customer           |
| Relation, synergy, communication | 7     | brand/customer     |
| Compliance with the self-image   | 4     | customer           |
| Attributes of product            | 4     | brand              |
| Symbolism                        | 2     | brand              |
| Knowledge of trends              | 2     | brand              |

The brand influences the brand identity, symbolism, knowledge of trends, and product attributes. At the same time, the customer, through their self-image, creates the brand perception, evaluates the offer and brand compliance, assesses the benefits, and determines their involvement, loyalty, and sense of belonging to the brand. The results indicate that only the elements Relationships and Synergy refer to two factors: both brand and stakeholders – it differs from the others concerning the object of influence. These elements unite the brand and the customer, and by summarizing the results, the authors observe that focusing on positioning between the two parties involved creates the strongest emotional bond (see Fig. 2.4).



Fig. 2.4. Correspondence of elements to objects of influence (author's developed framework).

The study of the relevance of the elements determining the influence of the positioning elements allows us to conclude that "Relationship" is an essential element because it is where the factors of the brand and the customers meet. However, the percentage of this element is not high (7 %). The growing relevance of the Relationship element aligns with recent studies. Studying the

literature, the author concludes that several authors note that it is the relationship with the consumer, not the product's characteristics, that promotes loyalty, bringing forward a new facet of marketing – emotional marketing. F. Kotler's 6-step branding conceptual model, and correlating with the above, presents "Brand trust" and "Brand beneficence" as key concepts influencing consumer perception (Kotler, 2016).

Relations/Synergy represents a brand's ability to build two-way relationships and emotional intimacy with its customers. Rarely highlighted in theory, but in practice, it is crucial (e.g., brands with a community base).

### 2.2.3. Conceptual grouping

To ensure conceptual continuity with the previous definition analysis, elements are grouped into conceptual categories following Section 2.1 (definition-based analysis). The identified theoretical elements were grouped into the same conceptual categories. This grouping not only enhances comparability between literature sources and theoretical constructs but also reveals structural gaps and convergences in the current understanding of brand positioning (see Table 2.5).

Table 2.5

Grouping of theoretical brand positioning elements by category (created by the author)

| No. | Element                                    | Grouped Category               |
|-----|--------------------------------------------|--------------------------------|
| 1.  | Brand differentiation                      | Competitive differentiation    |
| 2.  | Competition                                | Competitive differentiation    |
| 3.  | Brand perception in the minds of consumers | Customer perception            |
| 4.  | Brand identity                             | Internal brand identity        |
| 5.  | The adaptation to individual needs         | Value and relevance alignment  |
| 6.  | Benefits evaluated                         | Value and relevance alignment  |
| 7.  | Relation, synergy, communication           | Symbolic and visual expression |
| 8.  | Compliance with the self-image             | Internal brand identity        |
| 9.  | Attributes of the product                  | Competitive differentiation    |
| 10. | Symbolism                                  | Symbolic and visual expression |
| 11. | Knowledge of trends                        | Internal brand identity        |

The grouped structure serves as a foundation for model development and empirical validation. For example, elements such as Brand differentiation, Competition, and Product attributes are grouped under Competitive differentiation, while Perception in the Mind is aligned with Customer perception. Elements such as Brand identity, Self-image compliance, and Knowledge of trends formed the Internal brand identity category. This alignment reinforces the theoretical logic and prepares the ground for an integrated positioning framework. Theoretical elements are grouped by conceptual category, as seen in Fig. 2.5.

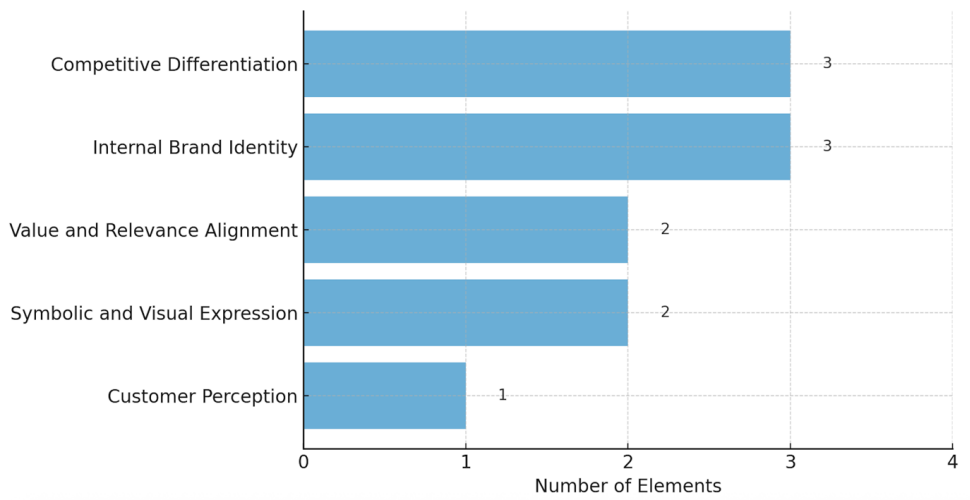


Fig. 2.5. Grouped theoretical elements by conceptual category (author's developed framework).

The theoretical analysis of BPE reveals a consistent dominance of functional, rational constructs – particularly Brand differentiation, Competition, and Perception. Symbolic and adaptive elements, while recognised in contemporary branding practices, remain underrepresented in classical theory.

The mapping of elements to the domains of market, brand, and customer further demonstrates that customer-related positioning logic, though conceptually rich, lacks a strong quantitative representation. Only one element, Relation/Synergy, spans both brand and customer domains, highlighting a theoretical gap in modelling mutual value creation.

The grouping of elements into conceptual categories, consistent with the definition analysis in Section 2.1, creates an integrated framework that reflects the structural and functional logic of positioning. These findings form the conceptual foundation for the development of the initial theoretical model of BP, which will subsequently be empirically tested and refined into the new holistic model – HBPM in later sections.

Building on the theoretical foundations presented here, the following section analyses how BP models incorporate, or omit, these conceptual elements. The classification of existing models and the analysis of their structural uniqueness will allow for further comparison between theoretical logic and applied modelling.

### 2.3. Classification of brand positioning models and analysis of unique attributes of the models

This section explores the structural characteristics and theoretical orientations of BP models through two complementary lenses. First, the “Theory of Marketing” framework is applied, based on the value perspectives *of*, *in*, and *with* marketing (Lüdicke, 2015), to interpret how BP is conceptually framed within broader marketing logic.

Second, a classification and comparative analysis of nine BP and branding models is conducted to identify their methodological foundations, purpose orientation, and unique structural attributes. The models are grouped by their underlying approach – holistic, process-based, or component-based – and analysed for their consistency with the theoretical perspectives and their contribution to positioning practice.

The aim is to understand not only how positioning models function individually, but also how they reflect evolving marketing logic and contribute to the development of a comprehensive positioning framework.

### 2.3.1. Perspective of a “Theory of marketing” for business positioning

To better understand the theoretical framing of BP models, this section adapts M.K. Lüdicke’s (2015) “Theory of Marketing”, which distinguishes between three conceptual perspectives: “**of**” marketing, “**in**” marketing, and “**with**” marketing. These perspectives help explain how marketing, and in this context, BP, is situated as either a meta-theory, an embedded function, or a co-creative process.

- The “**of**” perspective refers to the *nature* of marketing itself – its definition, scope, and conceptual role. It is meta-theoretical and extractive, aligned with classical transactional marketing, where customers are viewed as sources of value. This view focuses on short-term gains, profit maximisation, and success metrics such as revenue and sales volume.
- The “**in**” perspective focuses on the value embedded in a product, service, or brand. It highlights product-centric or brand-centric value creation, positioning as an internal subsystem that contributes to broader marketing goals. Success indicators include quality, satisfaction, and perceived functional or symbolic benefit.
- The “**with**” perspective represents value *co-creation* between the brand and its stakeholders, rooted in relationship marketing and service-dominant logic (Vargo & Lusch, 2004). Here, positioning goes beyond functional value to include community, collaboration, loyalty, and long-term engagement.

These perspectives provide a structured framework for evaluating how BP models reflect various levels of marketing theory. They range from transactional to relational, from value extraction to value co-creation. (see Fig. 2.6, adapted and exposed from Lüdicke).

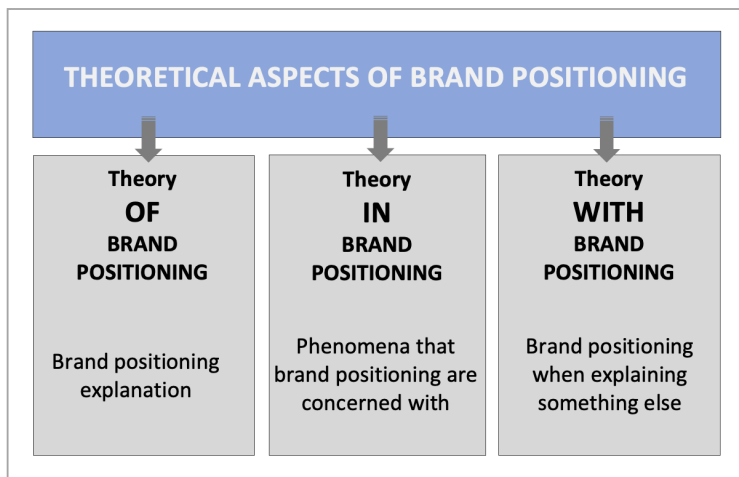


Fig. 2.6. Theoretical aspects of brand positioning (author’s adapted and expanded framework from Lüdicke (2015)).

Based on this framework, the analysis of nine BP and branding models indicates that **all models are positioned within the “in” marketing perspective**. This confirms that BP is predominantly conceptualised as an internally focused system – a function *within* marketing rather than a theory *of* marketing or a co-creative *with* process.

While some models reference emotional or symbolic aspects, few address co-creation, stakeholder involvement, or dynamic exchange. As a result, **the “with” marketing perspective remains underrepresented**, and none of the reviewed models provide a holistic integration across all three value logics.

This theoretical gap reinforces the justification for developing a new BP model that reflects contemporary marketing thinking, integrating strategic, emotional, symbolic, and stakeholder-driven dimensions.

The following section (2.4) builds upon these insights to present the author's theoretical model, synthesizing findings from the literature, model analysis, and conceptual categorisation into a unified and holistic positioning framework.

### 2.3.2. Analysis of brand positioning approaches and unique attributes of models

To better understand the logic, scope, and methodological diversity of existing BP models, the author conducted an attribute-based analysis of nine selected models. This analysis examines each model’s origin, conceptual focus, methodological approach, and intended application – whether it is primarily oriented toward the brand, the company, or the customer.

The goal is to compare how different models operationalise BP and which unique attributes they incorporate. This comparative overview helps identify conceptual patterns, structural differences, and potential gaps in existing frameworks, thereby supporting the justification and development of a new, more integrated model.

The findings are summarised in Table 2.6, which presents the unique attributes and methodological approaches of the analysed BP and branding models.

Table 2.6

Unique attributes of the models (created by the author)

| No. of model | Name of model                                                 | Basic, delivered from       | Method/ approach         | Purpose, direction |
|--------------|---------------------------------------------------------------|-----------------------------|--------------------------|--------------------|
| 1            | Brand concept management                                      | Consumer needs              | Process approach         | Brand              |
| 2            | Brand identity planning model                                 | Brand identity              | Process approach         | Brand              |
| 3            | Brand hexagon                                                 | Brand orientation           | Holistic approach        | Company & brand    |
| 4            | Customer-based brand equity model                             | Brand orientation           | Holistic approach        | Brand              |
| 5            | Brand asset management process                                | Brand orientation           | Process approach         | Brand              |
| 6            | Internal and external core value-based brand building process | Emotional marketing, values | Process approach         | Brand & company    |
| 7            | 3i model                                                      | Emotional marketing, values | Holistic approach        | Brand              |
| 8            | Market and brand-oriented framework                           | Brand orientation           | Holistic approach        | Brand & company    |
| 9            | 6-step branding conceptual model                              | Emotional marketing, values | Component-based approach | Brand              |

Different BP and branding models employ various methodological approaches to define and structure the positioning process (Strausa et al., 2022). To examine this diversity, the author analyses nine models, identifying each model's conceptual focus, methodological structure, and strategic orientation. The comparative results are summarised in Table 2.6, which highlights the unique attributes and modelling logic of each framework.

This analysis builds on the previously published research, where nine BP and branding models were analysed to determine their structure, logic, and unique attributes (Strausa & Gaile-Sarkane, 2022). The author identified three dominant methodological approaches used across the models – the holistic approach, process approach, and component-based approach – and synthesised their elements to inform the creation of a new model. Upon evaluation, it was concluded that three of these approaches dominate among the models analysed:

- The holistic approach;
- The process-based approach;
- The component-based approach.

These three approaches serve different functions within positioning logic. The holistic approach integrates BP within a broader organisational context. The process approach focuses on

structured phases of BD and positioning implementation. The component-based approach, meanwhile, relies on distinct elements of brand structure or communication logic without necessarily offering an integrative system.

Fig. 2.7 illustrates the methodological approaches across the analysed models, showing that holistic and process-based logics dominate, while other approaches appear only sporadically. The identification of these approaches supports the view that BP is a complex, multidimensional concept. Effective BP should not only ensure differentiation and relevance to the target audience but also contribute to long-term business outcomes – such as customer loyalty, stakeholder alignment, perceived value, and sustainable brand equity. These insights provide further justification for the development of a holistic, strategically embedded model of BP proposed later in this Thesis.

To study the modelling logic behind various BP frameworks, the author conducted a conceptual analysis of five distinct methodological approaches identified in the literature: the holistic approach, systems approach, process approach, component-based approach, and analytical approach.

These approaches differ in their conceptual orientation, level of integration, and modelling function. The figure below illustrates the defining logic and core characteristics of each approach (see Fig. 2.7).

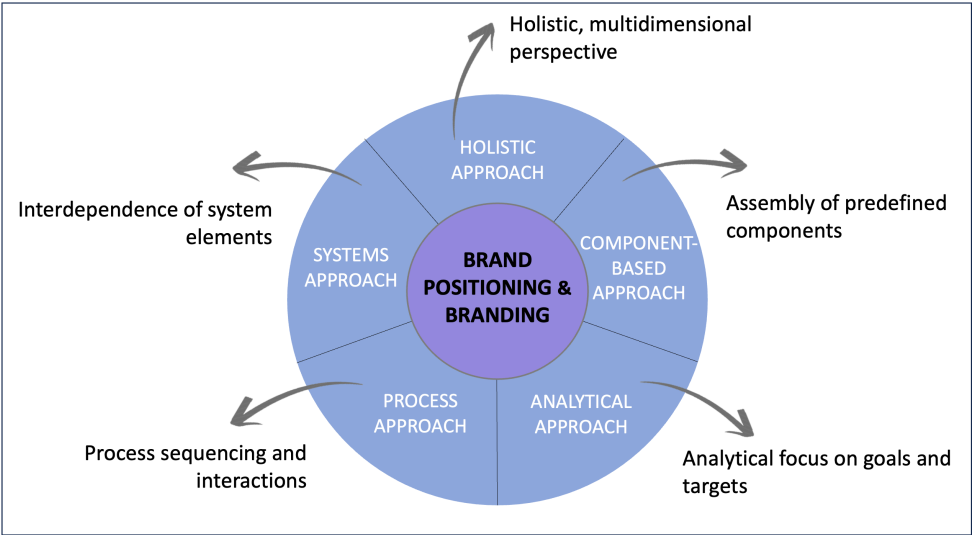


Fig. 2.7. Classification of methodological approaches in brand positioning models (author’s adapted conceptual framework).

Approaches differ in how they interpret the role of positioning in brand strategy – whether as an integrated process, a system of parts, a set of predefined components, or a linear decision framework.

The model illustrates that each methodological approach represents a different way of constructing and interpreting BP logic.



- The holistic approach views positioning as a multidimensional, integrative system that considers the interactions between internal and external brand aspects, as well as stakeholder dynamics.
- The systems approach emphasises the interconnectivity and interdependence of components, using systematisation to combine or segment brand elements.
- The process approach sees positioning as a sequential activity – guiding the step-by-step implementation of brand identity and communication strategy.
- The component-based approach involves assembling positioning frameworks from predefined modules or attributes, without necessarily ensuring conceptual coherence.
- The analytical approach isolates BP as a decision-based structure focused solely on goals and target outcomes, often lacking contextual integration.

This conceptual model serves as a foundation for evaluating existing models and supports the development of a more integrative positioning logic, proposed in later chapters.

To deepen the methodological comparison, the author conducted a detailed analysis of nine BP and branding models, identifying their conceptual bases, modelling logics, and strategic orientations. The findings are summarised in Table 2.7, which presents each model's origin, methodological approach, and directional purpose – whether it targets the brand, the company, or both. A detailed description of each model is provided in Section 1.1.4 and Appendix 3.

Table 2.7

Unique attributes and methodological approaches of brand positioning models (created by the author)

| No. of model | Name of model                                                 | Basic, delivered from       | Method/ approach  | Purpose, direction |
|--------------|---------------------------------------------------------------|-----------------------------|-------------------|--------------------|
| 1            | Brand concept management                                      | Consumer needs              | Process approach  | Brand              |
| 2            | Brand identity planning model                                 | Brand identity              | Process approach  | Brand              |
| 3            | Brand hexagon                                                 | Brand orientation           | Holistic approach | Company & brand    |
| 4            | Customer-based brand equity model                             | Brand orientation           | Holistic approach | Brand              |
| 5            | Brand asset management process                                | Brand orientation           | Process approach  | Brand              |
| 6            | Internal and external core value-based brand building process | Emotional marketing, values | Process approach  | Brand & company    |
| 7            | 3i model                                                      | Emotional marketing, values | Holistic approach | Brand              |

Table 2.7 (continued)

| No. of model | Name of model                       | Basic, delivered from       | Method/ approach         | Purpose, direction |
|--------------|-------------------------------------|-----------------------------|--------------------------|--------------------|
| 8            | Market and brand-oriented framework | Brand orientation           | Holistic approach        | Brand & company    |
| 9            | 6-step branding conceptual model    | Emotional marketing, values | Component-based approach | Brand              |

Based on this classification, the models were grouped by the methodological logic they reflect. As shown in Fig. 2.8, the holistic approach is the most prevalent among the analysed models (45 %), followed closely by the process approach (44 %). Only one of the nine models (11 %) is based on the component-based approach, indicating a lower tendency to apply fragmented or pre-defined modules in BP logic.

This distribution suggests a clear preference in branding literature for models that offer structural coherence (process logic) or strategic integration (holistic logic), as opposed to those that focus narrowly on components without systemic alignment.

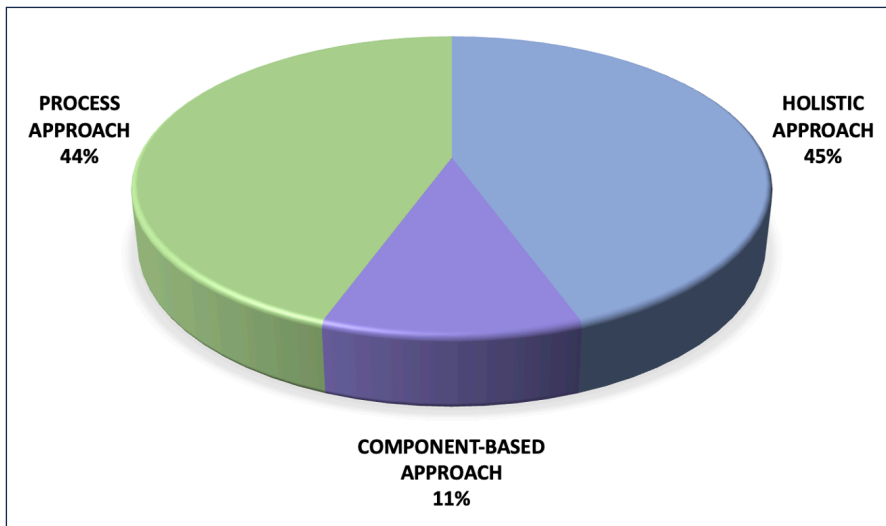


Fig. 2.8. Distribution of methodological approaches in brand positioning and branding models (author's developed classification).

The findings illustrated in Fig. 2.8 support the development of a holistic positioning model by demonstrating that most existing frameworks incorporate structured or integrative logic, yet few achieve complete conceptual synthesis across strategic, emotional, and stakeholder-oriented dimensions.

**Elements of the BP and branding models.** Within the research, the key elements of BP models were identified and synthesised through qualitative content analysis (see Table 2.8), while a detailed description of the models is provided in Section 1.1.4.

Table 2.8

Overview of positioning elements across brand positioning and branding models (created by the author)

| No. | Name of model                                                 | Elements of models                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | Brand concept management                                      | Brand concept stages (introduction, elaboration, fortification); brand concepts (functional, symbolic, experimental); positioning strategies; developing marketing mix; consumer perceptions of image/position.                                                                                                                                                                                                                                                                                |
| 2   | Brand identity planning model                                 | Developing a brand vision: elements of a brand vision.<br>Determining brand picture: determining brand image; creating brand contract; brand-base customer model; developing a brand asset management strategy: positioning the brand; extending the brand; communicating brand's positioning; leveraging the brand; pricing the brand. Supporting a brand management culture: measuring return on brand investment; establishing a brand-based culture.                                       |
| 3   | Brand hexagon                                                 | Positioning, core values, product category; product; vision and mission; brand name; company name; target audience.<br>Awareness; associations; loyalty. Quality, personality, communication.                                                                                                                                                                                                                                                                                                  |
| 4   | Customer-based brand equity model                             | Brand identity model: strategic brand analysis (customer analysis, competitor analysis, self-analysis); strategic identity system (brand identity (brand as product; brand as organisation; brand as person; brand as symbol)); value proposition (functional benefits; emotional benefits; self-expressive benefits); credibility (support other brands); relationship; brand identity implementation system (brand identity elaboration; brand position; brand-building programs; tracking). |
| 5   | Brand asset management process                                | Stages of BD (identity, meaning, response, relationships); branding objective at each stage (deep broad brand awareness, points-of-parity & difference, positive, accessible reactions; intense, active loyalty); building blocks (salience, performance, imagery, judgments, feelings, resonance).                                                                                                                                                                                            |
| 6   | Internal and external core value-based brand building process | Internal brand building process (mission, vision, organisational values, core values, brand architecture, product attributes, personality, BP, communication strategy, internal brand identity); brand equity; external brand building process (identity of the brand consumer; interest & brand sensitivity; brand awareness; brand associations; added values; self-image; relationship; brand loyalty).                                                                                     |

Table 2.8 (continued)

| No. | Name of the                         | Elements of models                                                                                                                          |
|-----|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| 7   | 3i model                            | Brand identity; brand image; brand integrity; brand; positioning; differentiation                                                           |
| 8   | Market and brand-oriented framework | The brand promise and core values; stakeholders (external); the organisation (internal). Market oriented approach; brand oriented approach. |
| 9   | 6-step branding conceptual model    | Brand purpose; BP; brand differentiation; brand identity; brand trust; brand beneficence.                                                   |

This table illustrates that BP is a multidimensional process involving strategic direction, emotional connection, consumer perception, values, and identity. However, it also reveals that no single model integrates all relevant dimensions.

The models were analysed to identify four meta-categories of positioning logic:

- parts involved (e.g., brand, company, consumer);
- areas involved (e.g., internal/external);
- positioning objectives (e.g., trust, differentiation);
- expected outcomes (e.g., loyalty, alignment with stakeholder values).

These findings informed the next step – the development of a theoretical model (TBPCM) to address identified conceptual gaps.

The analysis confirms that most models correspond with the *"in"* perspective of marketing theory, reflecting an internalised, product-/brand-centred logic. Few, if any, models extend into the *"with"* perspective, leaving stakeholder co-creation, symbolic meaning, and shared value underrepresented. While existing frameworks provide valuable guidance, the synthesis of model elements, attributes, and underlying logic indicates that they are fragmented and lack comprehensiveness. Several models incorporate structured stages, emotional elements, or brand–customer alignment, but no model alone covers the full spectrum of strategic, functional, symbolic, and stakeholder-oriented positioning.

These gaps provide a clear justification for the development of a new theoretical BP model – one that integrates not only structural coherence but also reflects contemporary brand-building realities, including emotional connection, symbolic value, and co-creative stakeholder dynamics.

Building upon this analysis, the following section introduces the author's proposed theoretical model. It integrates the identified positioning elements, perspectives, and structural dimensions into a unified BP framework, forming the conceptual basis for a holistic and adaptable BP logic.

## 2.4. Impact of brand positioning on the decision-making process of the customer

Customers experience numerous decision-making situations daily – from routine product selections to more complex brand evaluations. While the specific nature of these decisions may

vary by context, price sensitivity, or involvement level, the underlying behavioural mechanism generally follows a recognisable sequence of value-based evaluation, emotional filtering, and experiential learning.

Decision-making is shaped not only by functional product features, but also by symbolic meaning, brand associations, and the degree to which the brand resonates with the customer's values, identity, or aspirations. In this context, BP plays a critical role in shaping consumer perceptions at each stage of the decision-making journey – influencing awareness, preference, choice, and post-purchase evaluation.

As information environments become more saturated and competitive pressure intensifies, consumers increasingly rely on mental shortcuts and affective cues to process brand information efficiently. A well-structured BP strategy can therefore simplify decision-making by clearly communicating relevance, differentiation, and emotional value. This section examines how BP engages with consumer psychology and behavioral logic, ultimately influencing purchasing decisions and shaping the formation of brand loyalty.

### 2.4.1. Human decision-making behaviour and brand interaction

Based on the research findings, the author developed a model that illustrates the stages of human decision-making and integrates BP touchpoints into this process (see Fig. 2.9). This model demonstrates how brand perception, shaped through strategic positioning, interacts with customer values, emotions, and memory, ultimately influencing behaviour and brand choice.

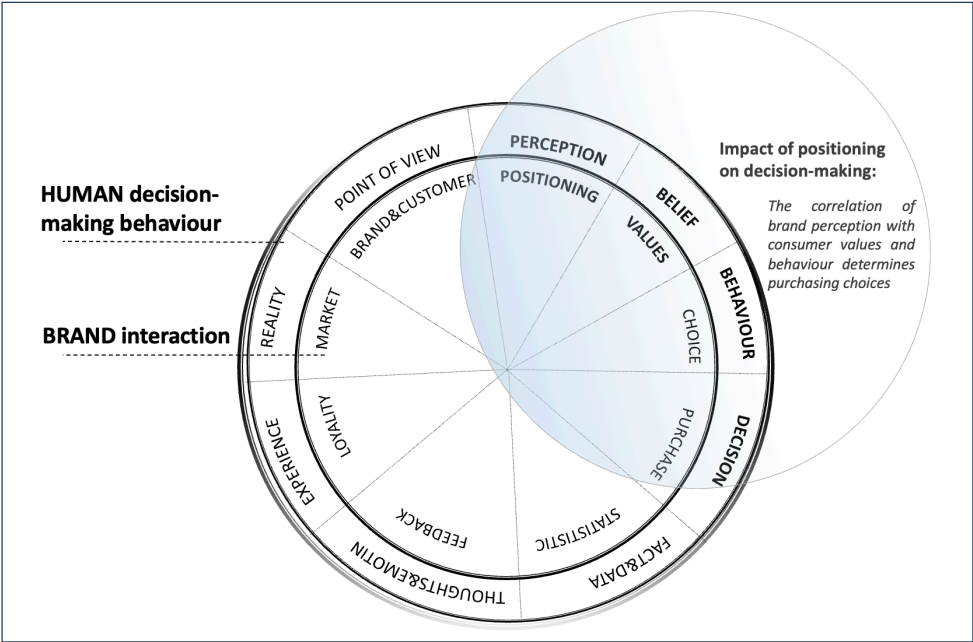


Fig. 2.9. The model of human decision-making process and its interaction with brand positioning (the author’s developed framework, scientific novelty).

Human behaviour in decision-making situations follows a cyclical and experiential logic. Individuals filter decisions through their point of view, which is shaped by prior experience and

knowledge. In a decision-relevant context, a person evaluates an offer or situation through the lens of personal beliefs and values. Depending on how well the situation aligns with those internal standards, a decision is made, resulting in a specific behavioral outcome.

These behavioral outcomes form part of an evolving knowledge base, shaping how similar situations are approached in the future. Each decision not only results in an immediate action but also contributes to the accumulation of experience that influences long-term consumer behaviour. In this cycle, BP operates as a key informational and emotional input that activates brand associations and consumer perceptions at critical stages of evaluation.

The interaction between a brand and customer occurs within specific decision-making moments, where the brand either aligns with or contradicts the consumer's internal expectations. This determines whether loyalty is built or lost. The customer's experience with a brand becomes not only a response but a learning event, directly affecting future brand-related decisions.

#### **2.4.2. Conceptual model of brand loyalty – interactions with stakeholders in the context of brand positioning**

Human decision-making, as discussed in the previous section, follows a cyclical and experiential logic in which prior experience, beliefs, and values shape each choice. Within this process, BP acts as a key input that activates brand associations and influences evaluation. Yet individual decision-making does not occur in isolation: it is embedded within a broader system of interactions where multiple stakeholders shape and reinforce brand meaning.

A well-positioned brand, therefore, functions not only as a cue in consumer decision moments but also as a relational mechanism that connects the organisation with its stakeholders. It communicates relevant value propositions while simultaneously building symbolic and emotional connections that shape consumer attitudes and behaviour. Research shows that such connections foster trust, attachment, and willingness to choose the brand, particularly in high-involvement decision contexts where symbolic and emotional value outweighs functional attributes (Aaker, 1996; Keller, 2001).

Scholars, including Kapferer (2012) and Urde (2003), highlight that brand equity and loyalty emerge when internal coherence and external relevance are consistently integrated into positioning strategies. These perspectives converge on the idea that positioning is more than a communication activity: it is an interactive, systemic process that enables long-term loyalty and business growth.

Building on this logic, the author developed a stakeholder-oriented conceptual model that presents BP as a relational bridge between brand expression and the formation of brand image, recognition, and loyalty (see Fig. 2.10). The model illustrates how positioning functions as a dynamic mechanism: beginning with the brand concept and its competitive context, moving through market positioning and stakeholder engagement, and culminating in brand recognition, loyalty, and the emergence of a “beloved brand.”

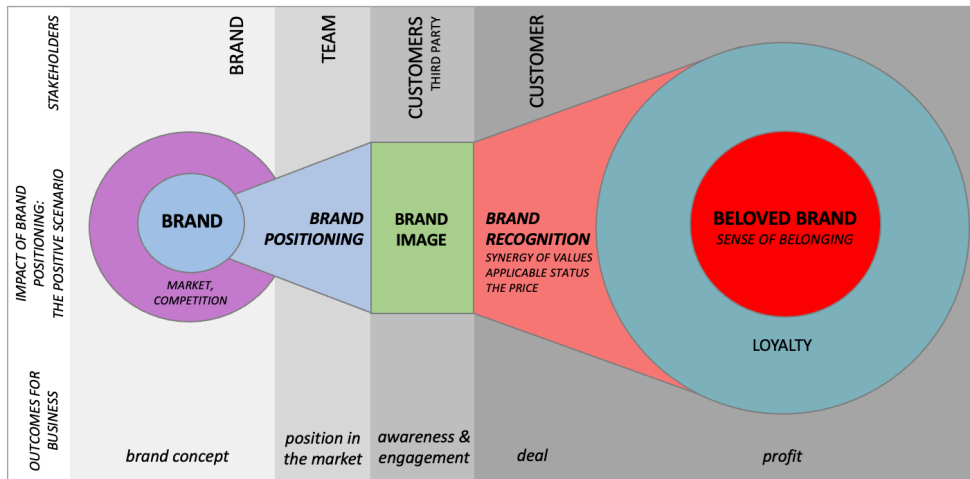


Fig. 2.10. Conceptual model: brand interactions with stakeholders: the context of brand positioning (author-created model, scientific novelty).

This framework integrates both tangible characteristics (product attributes, performance) and intangible associations (symbolism, identity resonance, trust), showing how stakeholder interactions at multiple levels – the brand organisation, employees, third-party actors, and customers – co-create brand meaning. By aligning internal brand architecture with external expectations, positioning serves as both a diagnostic tool and a transformative process that translates strategy into lasting outcomes: awareness, engagement, recognition of value, loyalty, and ultimately, sustainable profitability.

The novelty of this model lies in its explicit incorporation of stakeholder interactions into the brand loyalty formation process. Unlike traditional models, which emphasise consumer perception or communication in isolation, this framework visualises positioning as an ongoing system of relationships. It demonstrates that BP's strength depends on the coherence of organisational intent and responsiveness to stakeholder values, positioning it as a strategic governance mechanism for building loyalty and supporting sustainable business growth.

The comparative analysis of “The model of human decision-making process and its interaction with brand positioning model” and “Conceptual model: brand interactions with stakeholders: the context of brand positioning” demonstrates that both frameworks are interconnected and complementary, reflecting the multi-level nature of brand positioning (BP). Although they operate at different analytical levels – the former at the *individual* (consumer) level and the latter at the *organisational* (stakeholder) level – both models are governed by the exact underlying mechanisms: **cognitive**, **emotional**, and **behavioural** processes.

At the individual level, BP shapes customer decision-making by influencing how information is processed (cognitive), how trust and attachment are formed (emotional), and how value congruence between personal and brand values guides behavioural outcomes, such as preferences and loyalty. At the stakeholder level, the same mechanisms manifest as perception of brand credibility (cognitive), shared identity and emotional commitment (emotional), and sustained cooperation, advocacy, or partnership behaviour (behavioural).

The unifying principle across both models is **value congruence** – the alignment between the brand’s internal value system and its stakeholders’ values. This alignment functions as the central integrative mechanism that links cognition, emotion, and behaviour into a coherent structure of relationships. When value congruence is achieved, BP transcends its communicative role and becomes a strategic coordination system that harmonises brand meaning across different actors and interaction levels.

Thus, the two models collectively demonstrate that effective BP operates as a multi-level process of meaning creation, in which internal brand identity and external stakeholder perceptions are continuously aligned through shared values and reciprocal engagement. This synthesis provides theoretical evidence that BP simultaneously contributes to individual decision-making efficiency and organisational sustainability, thereby reinforcing the logic of the HBPM.

## 2.5. Development of hypotheses

To deepen the investigation into the strategic role of BP, this section develops research hypotheses derived from the theoretical and analytical work presented in the preceding chapters. Drawing on the author’s earlier studies and the literature on positioning, performance, and sustainability, the hypotheses aim to model how BP, when embedded into SM, influences both OP and OS.

As outlined in Section 1.2, **business development is examined through two complementary indicators: OP and OS**. OP is recognised as a multidimensional construct that captures short-term efficiency and effectiveness across both financial and non-financial outcomes (Venkatraman & Ramanujam, 1986; Richard et al., 2009). OS reflects a firm’s long-term viability and resilience, emphasising the alignment of economic objectives with adaptive strategic practices (Dyllick & Muff, 2016; Montiel & Delgado-Ceballos, 2014). These dimensions constitute the dual outcome pillars of sustainable business development – performance ensures operational and financial viability, whereas sustainability reflects resilience, stakeholder trust, and responsible resource management (Baumgartner & Ebner, 2010; Nidumolu et al., 2009).

Previous studies have typically investigated these factors in isolation – for example, the impact of brand equity on financial performance (Aaker, 1996; Keller, 2001; Knox, 2004) or the role of stakeholder orientation in supporting sustainability (Urde, 2003; Kotler et al., 2010; Kotler et al., 2017). However, there remains a lack of research conceptualising BP as a **holistic construct** and examining its combined influence on both performance and sustainability.

To address this gap, the hypotheses of this Doctoral Thesis are formulated to investigate **how BP contributes to OP and OS, and how this effect depends on its integration into SM**. On this basis, four central elements are identified: BP, OP, OS, and SM.

**The following hypotheses are proposed.**

- **H1.** Higher organisational performance (OP) is associated with higher levels of organisational sustainability (OS) ( $OP \rightarrow OS$ ).



- **H2a.** Strong brand positioning (BP) is associated with higher levels of organisational performance (OP) ( $BP \rightarrow OP$ ).
- **H2b.** Strong brand positioning (BP) is associated with higher levels of organisational sustainability (OS) ( $BP \rightarrow OS$ ).
- **H3a.** The effect of brand positioning (BP) on organisational performance (OP) depends on BP integration into strategic management (SM) ( $BP \rightarrow SM \rightarrow OP$ ).
- **H3b.** The effect of brand positioning (BP) on organisational sustainability (OS) depends on BP integration into strategic management (SM) ( $BP \rightarrow SM \rightarrow OS$ ).

The model (Fig. 2.11) illustrates these hypothesised relationships, where BP serves as the independent construct, OP and OS as dependent variables, and SM as the conditional factor. Arrows indicate the proposed effects (e.g.,  $BP \rightarrow OP$  corresponds to H2a).

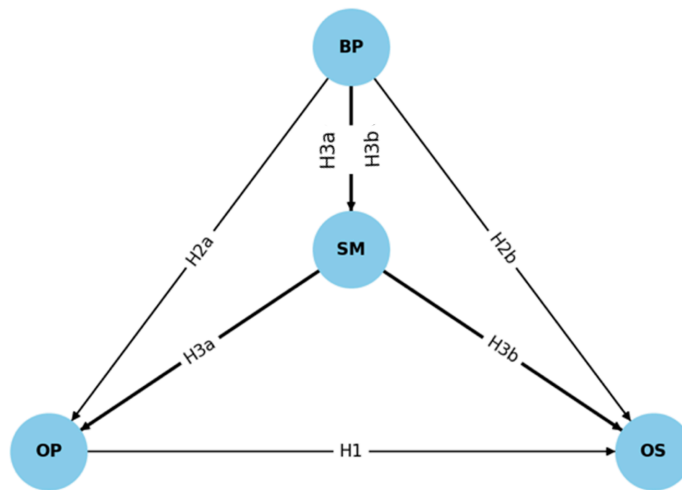


Fig. 2.11. Conceptual model: interaction between brand positioning, strategic management, organisational performance, and organisational sustainability (author-created framework).

By establishing this hypothesis framework, the study will move from conceptual modelling to empirical testing. The hypotheses reflect the author's proposition that BP, when strategically embedded, supports enhanced OP and contributes to sustainable business development. These assumptions are empirically examined in Chapter 3.

The preceding stages of the Doctoral Thesis – including the development of theoretical and analytical insights, the examination of BPE structures, and the comparison of positioning approaches – **conceptualise BP as a multidimensional and holistic construct**. These research stages form the foundation for the validation phase.

Chapter 3 develops and empirically tests a new holistic approach to BP, examining a set of hypotheses that strengthen the strategic relevance of BP by integrating it into SM.

### 3. EMPIRICAL STUDY

The empirical study phase is crucial for verifying the internal coherence, practical usability, and explanatory power of the newly developed conceptual model, thus fulfilling the Doctoral Thesis aim of establishing **BP as a strategic approach for sustainable business development**.

To develop a scientifically grounded BP model as a holistic approach, the author evaluated and synthesized findings from the literature review, qualitative insights from focus groups (conducted in 2023), expert interviews (conducted in 2024), quantitative analysis, and prior methodological approaches. As a result, the conceptual TBPCM was developed in 2022 as the initial stage of the model development process.

In the subsequent research phases, the TBPCM was evaluated and refined through focus group discussions with branding and marketing professionals, expert interviews with senior executives, and its practical application in a real-life BD project. This triangulated approach ensured that the conceptual model was validated through multiple complementary methods: expert-based insights, practitioner-driven evaluation, and application in a real business context. The practical case involved implementing the model within an export-oriented brand development initiative, allowing the assessment of its strategic coherence and usability.

This iterative process led to the development of the enhanced model – HBPM in 2024. The HBPM is a conceptual model that integrates both internal and external BPE.

The empirical validation of the conceptual model, conducted through a quantitative survey of top executives in 2024, confirmed the model's relevance and effectiveness. The findings demonstrate that BP affects OP and OS, and, critically, that embedding BP into SM significantly amplifies its positive impact.

#### 3.1. Overview of the empirical research design

The structured model development process is based on a systematically sequenced and methodologically grounded approach, incorporating elements commonly used in conceptual model construction and validation within management and branding research. Drawing upon theoretical literature, empirical findings, and the author's practical experience in strategic BP, the process reflects a multi-phase pathway designed to ensure both scientific rigor and practical relevance. The research employed a triangulated methodology, combining theoretical analysis, qualitative exploration, and practical application. The empirical study applied a qualitative validation logic, using purposive sampling and guided by the principle of theoretical saturation (e.g., Patton, 2015; Guest et al., 2006). In this type of model-validation research, the aim is not statistical generalisation but conceptual refinement and theoretical validation through context-rich data (e.g., Eisenhardt, 1989; Yin, 2018). Accordingly, senior executives and strategic decision-makers from diverse industries were selected to ensure that the findings reflected strategic-level BP practices.

While the author's experience is not part of the formal empirical dataset, it informed the contextual framing and application logic of the model, consistent with established perspectives

on theory-informed and practice-enriched conceptual model development (MacInnis, 2011; Jaakkola, 2020; Hair et al., 2019).

The process comprises **seven sequential phases**, each contributing to the refinement and validation of the HBPM.

To provide a clear overview of the research logic, methodology, and the sequential development process of the conceptual model, Fig. 3.1 presents the integrated research structure applied in this Doctoral Thesis. This structure illustrates the alignment between the theoretical and analytical framework and the empirical research framework, supporting the development, validation, and application of the HBPM. This structure aligns the theoretical and analytical frameworks with the empirical research framework, supporting the development, validation, and application of the HBPM in both research and practical BD contexts.

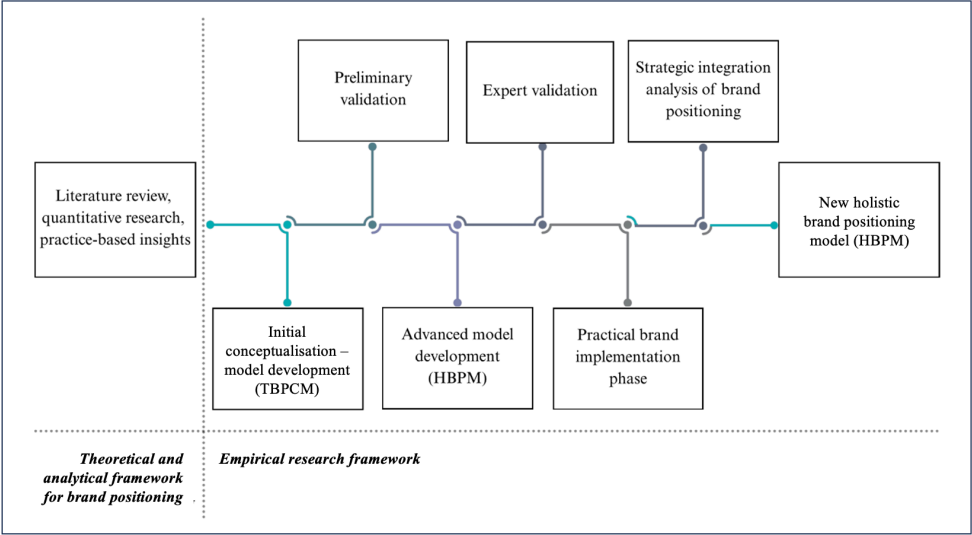


Fig. 3.1. Integrated research structure for the development and validation of the holistic brand positioning model (author’s developed framework).

The figure illustrates the structure and methodological flow of the research design, combining theoretical and analytical foundations with empirical validation and application stages. This section outlines the empirical research structure, methods applied, and sequential phases used to validate and enhance the developed BP theoretical model (TBPCM). The structured model development process comprises the following seven phases, as shown in Table 3.1.

Table 3.1

The structured model development process (created by the author)

| Stage No. | Empirical research stage name        | Description                                                                                                                                                      | Research outcome                                                       | Methodology                                       |
|-----------|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|---------------------------------------------------|
| 1         | Initial conceptualisation (TBPCM)    | Development of a theoretical BP model based on triangulated evidence based on literature review, quantitative research, and practice-based insights integration. | Developed new model: TBPCM                                             | Analytical synthesis method, conceptual modelling |
| 2         | Preliminary validation               | Validation of the theoretical model (TBPCM) through focus group of brand professionals to assess initial conceptual clarity.                                     | Validation insights and feedback                                       | Qualitative evaluation via focus group            |
| 3         | Advanced model development (HBPM)    | Construction of an expanded holistic model integrating internal and external dimensions.                                                                         | Finalised model HBPM structure incorporating five strategic dimensions | Conceptual synthesis; model refinement            |
| 4         | Expert validation                    | Semi-structured expert interviews (N=13).                                                                                                                        | Empirical validation of the model.                                     | Qualitative research; semi-structured interviews  |
| 5         | Practical brand implementation phase | Implementation of the model in the business environment – brand creation processes.                                                                              | Strategic BP using HBPM                                                | Case study method; model-driven BD                |
| 6         | Strategic integration analysis of BP | An exploratory study was conducted to investigate the interrelationship between BP and SM                                                                        | Empirical evidence and hypothesis confirmation                         | Online survey; hypothesis testing                 |
| 7         | Final consolidation of the HBPM      | This Doctoral Thesis introduces a newly developed and empirically validated HBPM, addressing both theoretical foundations and strategic applicability.           | Validated HBPM                                                         | Cumulative integration; conceptual consolidation  |

The empirical research process was designed to ensure a coherent and systematic validation of the developed BP model. It consists of a sequential set of activities that combines qualitative

and quantitative research methods, triangulated with expert and practitioner input. The aim was to both validate the theoretical structure and refine it based on practical applicability.

1. **Initial conceptualisation.** TBPCM is developed based on triangulated evidence, including A) a thorough literature review, integrating key concepts from leading BP theories and frameworks, B) a qualitative content analysis of BP definitions and theoretical perspectives, C) a comparative analysis of existing models, D) the author's experience in applied branding, which provided contextual insight for model development.

TBPCM is created, reflecting key dimensions and interrelations identified in the results of the exploratory phase of the research. This model serves as a transitional model to the new HBPM, defining the core dimensions and elements influencing BP developed during the validation process.

2. **Preliminary validation.** The TBPCM was validated through a structured focus group involving branding professionals and marketing practitioners. Feedback led to the conceptual adjustment of key model elements. Validation insights and feedback on TBPCM's clarity, relevance, and comprehensiveness are the result of this phase.
3. **Advanced model development.** An iterative refinement of the model structure is carried out based on expert assessment, creating HBPM with additional dimensions and integrating internal and external dimensions. The finalised HBPM structure, incorporating five strategic dimensions, has been developed.
4. **Expert validation.** Semi-structured expert interviews (N=13) were conducted to empirically assess the construct validity of the proposed model by evaluating the relevance, clarity, and interrelation of its dimensions and elements. Empirical validation of the model demonstrates internal consistency of dimensions and identifies inter-element relationships relevant for strategic BP.
5. **Practical brand implementation phase.** In this phase, application of the HBPM is performed in the structured development of an authentic brand. The model served as a strategic framework for guiding BP in brand value alignment and identity creation throughout the brand-building process. The developed brand is currently being introduced to international markets, validating the HBPM's practical relevance and strategic coherence in real-world business environments. As a result, a strategic brand is created and positioned using HBPM; ongoing market implementation demonstrates the model's applicability and effectiveness in branding for export-oriented ventures.
6. **Strategic integration analysis of BP.** An exploratory study was conducted to investigate the interrelationship between BP and SM. Building on the literature review, particularly the RBV of strategy formulation, this phase examined how business leaders perceive the role of BP within the SM framework. A set of hypotheses was formulated and tested through an online survey conducted among company executives (N =15). The aim was to determine whether embedding BP into strategic planning contributes to stronger brand outcomes and whether companies that treat BP as an integrated part of their strategy perceive greater strategic clarity and BP effectiveness. Empirical evidence confirms that BP, when embedded into SM, is perceived to be more impactful and

aligned with long-term business value creation. These findings reinforced the relevance of internal dimensions in the HBPM structure and supported the development of strategy-linked model adaptations.

7. **Final Consolidation of the HBPM.** In the final stage, the newly developed and empirically validated HBPM is consolidated, representing the culmination of all prior conceptual, empirical, and practical research phases. This stage synthesises insights gained from the model's theoretical foundation, expert validation, practical application, and strategic integration analysis.

The consolidation of the HBPM ensures that the model is not only conceptually coherent but also grounded in empirical findings and practically applicable. It addresses the long-standing fragmentation in the literature by integrating external influences, internal brand architecture, strategic positioning logic, performance indicators, and outcomes into a single system. Unlike prior approaches that treated positioning as a communication or identity-based exercise, the HBPM demonstrates its role as a strategic resource and management mechanism, directly linked to OP and OS.

This structured research framework provides a robust empirical foundation for the theoretical assumptions of the HBPM, ensuring both scientific rigor and practical relevance. The validation involving export-oriented firms further illustrates the international applicability of the HBPM, suggesting its significance beyond the Baltic context and across diverse industries.

### **3.2. Development of a new theoretical brand positioning model**

A brand must have a clear and consistent brand position and integrity across all its elements to be perceived as a cohesive entity. Strategic BP helps create a unified brand, ensuring that all brand actions are consistent. Therefore, in response to the identified conceptual gaps in the existing BP literature and the need for a more integrated strategic branding framework, TBPCM was developed as the foundation for the HBPM, as shown in Fig. 3.2.

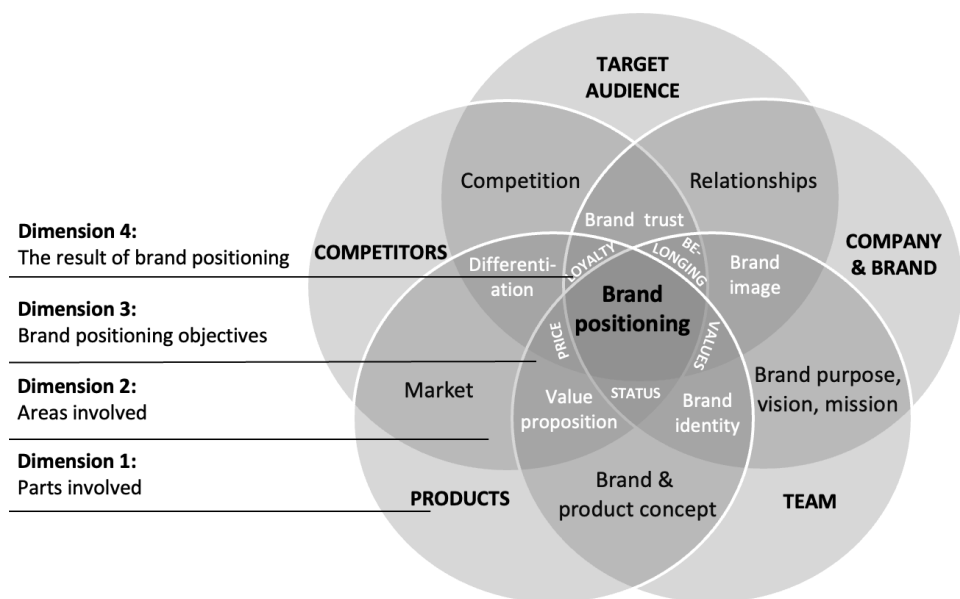


Fig. 3.2. Initial model: Theoretical brand positioning conceptual model (author's developed model).

The resulting TBPCM comprises four interconnected dimensions, including internal BPE groups: the parts involved, areas involved, BP objectives, and the outcome of BP, as shown in Table 3.2.

Table 3.2

Dimensions and included elements of the theoretical brand positioning conceptual model  
(created by the author)

| Dimension | Name of Dimension | Included Elements                                                                           |
|-----------|-------------------|---------------------------------------------------------------------------------------------|
| <b>D1</b> | Parts involved    | Target audience; Company & brand; Team; Products; Competitors.                              |
| <b>D2</b> | Areas involved    | Market; Competition; Relationship; Brand Purpose, Vision, Mission; Brand & product concept. |
| <b>D3</b> | BP objectives     | Differentiation; Brand trust; Brand image; Brand identity; Value proposition.               |
| <b>D4</b> | The result of BP  | Loyalty; Belonging; Values; Status; Price.                                                  |

This structure provided a coherent framework that enabled an understanding of the interdependency between strategic inputs and BP outputs, laying the groundwork for the later development and empirical validation of the HBPM. This integrative framework makes a significant contribution by combining strategic and perceptual elements into a unified structure

with practical relevance for brand building and brand revision. It will later prove particularly relevant in export-driven contexts.

The model construction process began with a systematic literature review of seminal and contemporary works on BP, branding strategy, and marketing theory. It identified recurring dimensions, influential factors, and structural limitations across existing conceptual models. Key theoretical foundations were drawn from strategic brand management (e.g., Keller, Aaker), differentiation and perceptual positioning theory (e.g., Ries & Trout), and value co-creation perspectives. Parallel to this, a qualitative content analysis was conducted on 31 distinct definitions of BP, as well as academic and practitioner perspectives. This enabled the identification of latent themes and component clusters central to the BP phenomenon. A comparative analysis of existing BP models further supported the structuring of conceptual elements and interrelationships.

To ensure contextual relevance, the author integrated professional experience in strategic branding and export market development, utilizing it as an interpretive layer to refine the model's logic and coherence. This application-driven lens, though not formally part of the empirical data collection, aligned with established practices that acknowledge practitioner-informed conceptual development (MacInnis, 2011; Jaakkola, 2020).

The TBPCM is distinct in its integrative and systemic orientation, bringing together previously fragmented perspectives in BP theory and paving the way for a more holistic view.

**The methodological approach used to develop the TBPCM** is grounded in theoretical foundations from academic research. For the systematic literature review, Snyder (2019) provides a precise categorisation and structure suitable for business research. In the qualitative content analysis phase, the methods of Elo & Kyngäs (2008) and Mayring (2014) were adopted to guide the inductive identification and grouping of themes from BP definitions. The use of the Elo & Kyngäs (2008) and Mayring (2014) frameworks ensured a systematic approach to qualitative theme extraction, both of which are widely adopted in content analysis across social science research. These authors provide established frameworks that support transparent and replicable analytical processes. Additionally, the conceptual foundation of this model has been presented in two peer-reviewed academic publications (Strausa et al., 2022; Strausa et al., 2023), providing further validation of its academic contribution.

**Ethical considerations.** Participation in the focus groups, interviews, and surveys was entirely voluntary, with informed consent obtained from all participants. Anonymity and confidentiality were strictly maintained, and the data are presented in aggregated form to prevent identification of individuals or organisations. All collected information was used exclusively for academic purposes in the context of this doctoral research. By integrating practice-based knowledge, the research design also aligns with the academic rationale described by MacInnis (2011) and Jaakkola (2020), who emphasise that practical insights can make meaningful contributions to conceptual development, particularly in applied disciplines such as branding.

Given its integrative conceptual structure, the TBPCM serves as a foundational framework that requires empirical validation and refinement. The following section describes the preliminary



validation process of the model through expert input and its iterative transformation into the HBPM.

### **3.3. Validation of the theoretical brand positioning conceptual model**

To ensure the conceptual robustness, theoretical validity, and practical relevance of the newly developed TBPCM, a qualitative validation was conducted using expert focus groups. This phase served as a critical step between the initial conceptual model development and the creation of the HBPM. The method chosen, focus group interviews, was established for evaluating participants' understanding, perceived utility, and relevance of theoretical frameworks in applied research (Krueger & Casey, 2015; Morgan, 1997). To validate the conceptual model and test the proposed hypotheses, a two-step methodological triangulation was applied: 1) qualitative exploration via focus groups and semi-structured expert interviews; and 2) quantitative confirmation will be obtained through a survey of top executives during the next phase of research. While the initial phase focused on open-ended expert evaluations and discussion-based validation, the survey phase employed a structured Likert scale to quantify perceptions and relationships. Participants also evaluated the assumed relationships between BP, SM, and organisational outcomes.

**Focus Group Design and Participants.** The focus group research was conducted in October 2023 through two in-person sessions in Latvia. Each session lasted 80 minutes and included 8 participants, resulting in a total of 16 branding and marketing professionals representing 16 different organisations, 10 of which export their products or services (see ethical considerations in Section 3.2).

The participants held senior roles, including brand managers, marketing managers, executives, export managers, and marketing specialists across various industries such as food and beverage manufacturing, technology, agriculture, construction, education, and cosmetics. Notably, 62 % of participants had direct experience with brand internationalisation or export market development, and the average professional experience across participants was 9 years. Most participants represented small and medium-sized enterprises, with three participants from large companies and two startups.

Participants were selected through purposive sampling, based on their senior managerial roles, direct involvement in strategic decision-making, and experience in brand management and business development. Additional criteria included industry diversity, company size, and export orientation, ensuring that the focus group brought together a broad range of perspectives relevant to the research objectives. Characteristics of focus group participants are shown in Table 3.3.

Table 3.3

Characteristics of focus group participants (author's compilation)

| Participant | Industry            | Company size | Position                     | Relevant expertise                                           | Experience (years) | Export |
|-------------|---------------------|--------------|------------------------------|--------------------------------------------------------------|--------------------|--------|
| A           | Retail              | SME          | Category Buyer               | Product assortment development, Brand assessment             | 14                 | no     |
| B           | Logistic            | SME          | Social media specialist      | Marketing tactics, Brand communication                       | 6                  | yes    |
| C           | Distribution        | Large        | Key account manager          | Sales expansion, Brand adaptation to the market, Brand sales | 12                 | yes    |
| D           | Agriculture         | Startup      | Owner, executive             | BD, Strategic marketing                                      | 4                  | no     |
| E           | Marketing agency    | SME          | Owner                        | Merchandising, Branding, Brand assessment, BP                | 21                 | yes    |
| F           | Telecommunications  | Large        | Marketing manager            | Marketing management, Strategic marketing, Branding, BP      | 8                  | no     |
| G           | Beauty care         | SME          | Social media specialist      | Marketing tactics, Brand communication                       | 7                  | no     |
| H           | Producing           | Large        | Marketing manager            | Marketing management, Marketing strategy, Branding, BP       | 8                  | yes    |
| I           | Producing           | SME          | Export manager               | Brand adaptation, Brand sales, BP                            | 7                  | yes    |
| J           | Pet Products Retail | SME          | Marketing manager            | Marketing management, Marketing strategy, Branding, BP       | 8                  | no     |
| K           | Producing           | SME          | Communication specialist     | Brand communication, Advertising                             | 5                  | yes    |
| L           | Sales               | SME          | Key account manager          | Sales expansion, Brand adaptation to the market, Brand sales | 8                  | no     |
| M           | Agriculture         | SME          | Communication specialist     | Brand tactics, Brand communication                           | 6                  | yes    |
| N           | Producing           | SME          | Business development manager | BD, Product development, Brand adaptation to the market, BP  | 9                  | yes    |

Table 3.3 (continued)

| Participant | Industry        | Company size | Position                     | Relevant expertise                    | Experience (years) | Export |
|-------------|-----------------|--------------|------------------------------|---------------------------------------|--------------------|--------|
| O           | IT              | Startup      | Owner, executive             | SEO, web creation, Marketing strategy | 11                 | yes    |
| P           | Interior design | SME          | Customer relation specialist | BP, Brand sales, BD                   | 15                 | yes    |

**Objectives and Structure of the Focus Group.** The primary objectives of the focus group sessions were:

- To assess the conceptual logic and completeness of the TBPCM;
- To evaluate the clarity and relevance of the dimensions and their elements;
- To collect feedback on element naming and perceived interconnections;
- To explore the model's applicability for real-world BD and strategic planning;
- To identify potential extensions or adjustments needed for a better practical fit;
- To test the proposed hypotheses.

The focus group discussions were semi-structured and guided by a question set tailored to address the above objectives (see Appendix 5). Questions focused on perceived clarity of the model, interdependencies among elements, potential missing elements, and overall usability for branding purposes.

**Key findings and interpretations.** The focus groups yielded the following key insights:

- **Model comprehension and relevance.** 94 % of participants found the model structure easy to understand and conceptually sound. 81 % agreed that it appeared comprehensive in its current form, while others noted that they were not qualified to assess completeness.
- **Perceived practical utility.** Participants affirmed the model's applicability in various real-world contexts, particularly in brand creation, brand audit, brand refreshing, marketing planning, and export strategy development.
- **Need for external factor inclusion.** 56 % of participants emphasised the importance of integrating external influences, such as political, socio-cultural, legal, and economic changes, into the model. Cited examples included the COVID-19 pandemic and war-related crises, which had forced brands to reposition quickly in response to shifting societal priorities (e.g., safety, health, national identity).
- **Extension to export-driven branding.** The model was considered especially suitable for brands entering international markets, where positioning clarity and message alignment are crucial for perceptibility and success.
- **Element naming and detail.** While most participants understood the elements, 25 % suggested that element subcomponents should be described in more detail, to make the

model more understandable. Some also proposed reviewing the wording of the element names, as similar concepts can be labelled differently in different contexts.

- **Support for the hypotheses.** Evaluating the assumed relationships between BP, SM, and organisational outcomes, a strong consensus emerged among participants. 88 % (14 out of 16 participants) confirmed the hypothesized interrelations, stating that effective BP contributes significantly to OP and OS, and that its strategic integration enhances this effect. These qualitative insights provided early empirical evidence in support of the hypotheses.

**Model Adjustment and Development Implications.** Based on these findings, the author incorporated a fifth dimension, External influences, into the evolving HBPM framework. This dimension was structured using the widely recognised PESTLE framework (Aguilar, 1967; Johnson et al., 2008), which encompasses the following factors: Political, Economic, Socio-cultural, Technological, Legal, and Environmental. This extension acknowledged that strategic BP is shaped not only by internal brand factors but also by dynamic macro-environmental influences.

The focus group validation phase served as a crucial milestone in transitioning from the TBPCM to a more holistic and application-ready framework (HBPM). It demonstrated that the model not only held theoretical merit but was also perceived as strategically and operationally valuable by experienced practitioners.

**Conclusion: Preliminary Validation Outcomes for the TBPCM.** The expert focus group validation confirmed the TBPCM's conceptual robustness, theoretical validity, and practical relevance. Participants emphasised the dynamic interplay between internal brand elements and the importance of internal consistency in positioning strategies. Notably, the discussions highlighted the significant role of external macro-environmental factors, including political, economic, and cultural dynamics, in influencing strategic BP decisions.

These insights underscored the need to expand the initial model beyond internal strategic dimensions. As a direct result, the model will be refined and evolved into the more comprehensive HBPM, which incorporates both internal brand architecture and external contextual influences. The HBPM will thus be better equipped to address the complexities and dynamics of contemporary branding environments, particularly in export-oriented contexts. Confirmation is provided by early empirical support for the hypotheses, which were later tested in the executive interviews and survey.

The author proposes the following tasks for further research in this phase of the work:

- To improve the names of the elements and create more detailed descriptions of the elements in further research, based on participant feedback and repeated study of scientific literature on specific topics.
- To test the updated model, we conducted in-depth expert interviews and applied it in practical BD.
- To develop and describe the approved model in further stages of the research.

### 3.4. Practical refinement of the model: in-depth interviews and business case implementation

Following the initial theoretical development and preliminary validation of the TBPCM through expert focus groups, the model underwent further refinement through real-world application and validation among experts. These practical insights were obtained in two complementary ways: 1) conducting in-depth expert interviews with experienced professionals involved in brand strategy and management, and 2) applying the model in a real business context to guide the creation and positioning of a new brand.

While the focus group validation highlighted the need to incorporate a fifth dimension, “External Influences”, to capture macro-environmental factors (aligned with the PESTLE framework), the subsequent qualitative stages enabled a deeper examination of how the model performs in practice. The in-depth interviews provided detailed evaluations of model components and tested their perceived clarity, applicability, and interrelations across different organisational settings. At the same time, the business case offered an opportunity to operationalise the evolving model within the strategic and creative processes of real-time BD. This stage reflects a triangulated approach to model refinement by integrating practitioner knowledge, stakeholder feedback, and applied branding experience. Together, these inputs supported the transition from the validated theoretical framework (TBPCM) to the more comprehensive and practice-ready HBPM, which better reflects the dynamic complexity of contemporary branding environments.

#### 3.4.1. Adaptation of the brand positioning model for qualitative evaluation

The previously tested TBPCM was expanded to include a fifth dimension, and the author also reviewed the names and placement of elements within the model. Before further research in focus groups, refinements of model dimensions and elements were made to the model for subsequent validation:

- During the refinement of the model, the element originally titled “Brand purpose, Vision, Mission” was revised to **“Brand identity, mission, vision”**. This change reflects a deeper conceptual understanding of the internal logic and interrelationships among these components. Based on an extensive literature review and the author’s empirical findings, it was concluded that brand mission and vision are not separate from brand identity; instead, they are derived from it and serve as its strategic extension. These elements represent the outward and inward expressions of identity in communication and organisational direction. Several authors support this integrative perspective. Kapferer (2012) emphasises that “Brand identity gives direction and purpose; it is the starting point for defining the brand’s mission, vision and values.” Aaker (1996) further explains that “The brand identity system should guide the development of the brand’s mission, vision, and brand-building programs.” Similarly, de Chernatony (1999) highlights the connection between identity and vision, stating that “Brand vision is a key internal expression of brand identity – it provides a future orientation, guiding the strategic development of the brand.”

By consolidating these related components, the concrete element gains both conceptual clarity and strategic coherence. This alignment ensures that the identity-driven strategic brand mission and vision are appropriately reflected within the model structure.

The team also shapes the brand identity; individuals embody and communicate the brand both internally and externally. Scholars emphasise that the team plays a central role in delivering, expressing, and sustaining a brand's identity and values (de Chernatony & Harris, 2000; Burmann et al., 2009). Ind (2003) notes that "a strong brand identity cannot be developed or sustained without the involvement of the people within the organisation" (Ind, 2003). Placing "Brand identity" within the same element components as "Mission and Vision," reflecting the interaction between the "Team" and "Brand" elements, is therefore a logical integration. The element "Values" subsequently emerges as a natural outcome of this overlap.

- The element "Brand and product concept" is expanded to **"Brand purpose and product concept"** to reflect the central role of brand purpose in defining the scope and nature of products a brand offers. Several scholars emphasise that an articulated brand purpose serves as a strategic guide for product development and innovation. For instance, Keller (2013) notes that brand purpose "defines the values and direction that drive what the brand stands for and what it delivers." Similarly, Kotler and Sarkar (2018) state that "a brand purpose clarifies which products and services should be pursued to create meaningful impact." Furthermore, Urde (2003) highlights that brand core values and purpose are deeply embedded in the firm's strategic decisions, including product-market fit and long-term brand expression.
- To enhance the structural clarity and strategic applicability of the model, a distinct element, **"Brand equity"**, has been incorporated. This element is conceptually and functionally interconnected with neighbouring components, including elements "Brand identity, Mission, Vision", "Brand purpose and product concept", "Brand image", and "Value proposition". Its central placement in the model reflects its integrative nature, serving as both a result of internal brand consistency and as a driver of external brand perception.

Brand equity represents the cumulative value generated by a brand, derived from consumer perceptions, brand loyalty, and the brand's ability to command price premiums or customer preference (Aaker, 1991; Keller, 2013). It is built upon a coherent brand identity, purposeful brand offerings, and consistent communication, all of which are reflected in the surrounding elements of the model. Scholars underline that brand equity is both a strategic asset and a mediating construct between brand strategy and business performance (Christodoulides & de Chernatony, 2010; Kapferer, 2012).

By explicitly positioning "Brand equity" within the model, it becomes easier to trace how brand-related decisions influence long-term business value and market competitiveness. This structure provides a more transparent framework for BP, enabling practitioners and researchers to observe how various components contribute to the creation and reinforcement of brand equity.

- The element “**Company and brand**” is integrated as a single construct, acknowledging the interdependence between corporate and BP. From the perspective of strategic brand management, a brand’s positioning cannot be separated from that of the company, as both reflect a shared set of values, identity, and strategic direction.

Scholars emphasise that corporate values, culture, and strategic goals often form the foundation of BP, especially in corporate brands or brand-led organisations (Hatch & Schultz, 2003). Even in cases where companies manage multiple brands, the overarching corporate ethos influences the way individual brands are perceived and positioned (Balmer, 2010).

Moreover, Kapferer (2008) stresses that "a brand is the face of the company," and therefore, brand identity and corporate identity must be aligned to maintain strategic coherence and authenticity. Misalignment between the company and BP can lead to stakeholder confusion and diluted brand equity (Aaker & Joachimsthaler, 2000).

In this context, treating “Company and Brand” as a unified element ensures that the positioning framework reflects both internal and external realities. It highlights the need for an integrated strategic approach where organisational values, culture, and positioning are consistently communicated through the brand.

- Reformulation of the element name “Market” to “**Market position**” was undertaken to reflect the strategic orientation of the corresponding dimension, now termed as a strategic position. The revised name emphasises the brand’s specific place and role within the competitive environment rather than the broader market context. This adjustment aligns with the strategic nature of positioning theory, which focuses on how a brand is perceived relative to competitors in the minds of consumers (Ries & Trout, 2001; Kotler & Keller, 2016). By specifying “Market position,” the model emphasises the importance of distinctiveness and differentiation as central to an effective brand strategy. The arrangement of elements in the model and the reflection of the overlay confirm the above.
- The element “Relationships” is extended and reframed as “**Recognition and relation**” to emphasise the interconnectedness between brand awareness and the development of meaningful relationships with the target audience. In BP, relationships are grounded in the brand’s ability to be recognised, remembered, and trusted. Without visibility and awareness, relational depth cannot be achieved.

Brand recognition is a prerequisite for initiating interaction and emotional connection, serving as the gateway to building brand–consumer relationships. Scholars highlight that brand salience and awareness are foundational to consumer engagement and loyalty development (Keller, 2013). In the author’s model, loyalty is also presented as an outcome, associated with the element “Recognition and relation”. Furthermore, brand relationships emerge through consistent brand signals and emotional resonance, often driven by the perceived relevance and accessibility of the brand (Fournier, 1998; Aaker, 1996).

The updated element name thus reflects a dual function: 1) ensuring that the brand achieves cognitive accessibility (recognition), and 2) facilitating emotional and

behavioural engagement (relation). This framing aligns with the view that strong brands not only attract attention but also build lasting bonds with consumers.

In the subsequent steps of the research, in-depth interviews are conducted, and in parallel, the author performs BP for introducing a new brand into the international market, thereby providing practical research for testing a new model. An improved version of the model is used to present an already validated HBPM subsequently.

#### **3.4.2. In-depth expert interviews with experienced professionals**

To ensure the scientific validity of the proposed HBPM, semi-structured, in-depth interviews were conducted with purposively selected experts as part of the empirical study. This methodological step aimed to assess the conceptual relevance, clarity, and practical applicability of each element included in the model. By combining open-ended discussions with structured rating scales, each dimension and element of BP was validated. Interviews were conducted with company owners and executives (see ethical considerations in Section 3.2).

The empirical validation phase employed a purposive sampling strategy (Patton, 2015), focusing on senior executives and strategic decision-makers with substantial expertise in brand management and business development. The selection was guided by the principle of theoretical saturation (Guest, Bunce, & Johnson, 2006), whereby data collection continued until no new substantive insights emerged. In qualitative, model-validation-oriented research, the aim is not statistical generalisation but conceptual refinement and theoretical validation through rich, context-specific data (Eisenhardt, 1989; Yin, 2018). Accordingly, the final sample size of 13 interviewees was deemed methodologically sufficient.

The involvement of senior-level participants, including top executives and company founders, ensured that the collected data reflected strategic BP decisions and provided comprehensive insights into internal brand logic, stakeholder alignment, and market applications. While the number of participants was limited, the breadth of industries represented and the depth of strategic expertise substantially enhanced the robustness and credibility of the validation process. On average, participants had 12 years of professional experience, ensuring a high level of knowledge and contextual understanding.

The experts represented nine different industries, contributing to a diverse perspective on BP practices. Data collection took place in February and March 2024, with each in-depth interview conducted in person and lasting approximately 90 minutes per session.

The first part of the interview aims to assess the model's applicability from both strategic and operational perspectives, to examine the perceived relationships between the elements of BP, and to identify opportunities for improving the model's structure. In the second phase of the interview, the hypotheses put forward earlier are tested (hypotheses put forward in Section 2.5). Additional questions are asked of respondents who have experience in developing and implementing innovations in the third phase of the interview to confirm the successful application of the new model in innovation creation.

Unlike the focus group sessions of the research, the interview phase is designed to gain individual, more profound insights from experienced BP and SM practitioners. This approach



aligns with best practices in conceptual model development, where triangulation between different qualitative methods (MacInnis, 2011; Jaakkola, 2020) enhances both the reliability and robustness of the results.

The method enabled more structured and individualised assessments, particularly in terms of weighting the model dimensions and their practical relevance. Given the qualitative depth and purposeful sampling, as well as the fact that these in-depth interviews are used as one of several practical research methods, the sample size (N = 13) was considered appropriate for in-depth expert interviews (Yin, 2016; Patton, 2015).

**Respondent profile.** The empirical research was conducted through structured interviews with 13 interviewees representing nine industries. The average age of the respondents was 45 years, and they had, on average, 12 years of professional experience. 10 of the participating companies export their products or services, and the majority (10) are actively engaged in innovation. Participants for the expert interviews were selected through purposive sampling to ensure substantial expertise directly relevant to the research objectives. The interviews involved company owners and senior executives whose positions enabled them to provide strategic insights into BP and its integration into organisational management. The selection criteria emphasised leadership responsibility, direct involvement in decision-making processes, and extensive professional experience in brand management, SM, or international business development. Attention was also given to diversity across industries and company sizes to capture a broad spectrum of perspectives. Detailed information on participant characteristics is provided in Table 3.4.

Table 3.4  
 Characteristics of interview participants (author’s compilation)

| Interviewees | Industry                 | Company size | Position       | Relevant expertise                    | Age | Experience (years) | Export | Innovations |
|--------------|--------------------------|--------------|----------------|---------------------------------------|-----|--------------------|--------|-------------|
| A            | Food production          | SME          | Owner/ Founder | SM, product development, BP           | 52  | 17                 | yes    | yes         |
| B            | Marketing services       | SME          | Owner          | SM, BP, Branding                      | 50  | 23                 | yes    | yes         |
| C            | Interior design services | SME          | Executive      | SM, BP                                | 46  | 18                 | yes    | yes         |
| D            | Food production          | Large        | Executive      | Branding, Product development, SM, BP | 43  | 12                 | yes    | yes         |
| E            | Food production          | SME          | Owner          | Branding, SM, BP                      | 56  | 10                 | yes    | yes         |
| F            | Catering services        | SME          | Owner/ Founder | SM, BP                                | 38  | 8                  | no     | no          |

Table 3.4 (continued)

| Interviewees | Industry             | Company size | Position          | Relevant expertise          | Age | Experience (years) | Export | Innovations |
|--------------|----------------------|--------------|-------------------|-----------------------------|-----|--------------------|--------|-------------|
| G            | Retail trade         | Large        | Executive         | SM, BP                      | 44  | 10                 | no     | no          |
| H            | Food production      | SME          | Executive         | SM, BP                      | 35  | 9                  | yes    | yes         |
| I            | Telesales            | SME          | Owner             | Communication, SM, BP       | 43  | 16                 | yes    | yes         |
| J            | Certification        | SME          | Executive         | SM, BP                      | 51  | 9                  | no     | no          |
| K            | Cosmetics production | SME          | Owner             | Product development, SM, BP | 39  | 8                  | yes    | yes         |
| L            | Training company     | SME          | Owner/<br>founder | SM, BP                      | 55  | 13                 | no     | no          |
| M            | Food production      | SME          | Executive         | Branding, SM, BP            | 36  | 7                  | yes    | yes         |

**Methods and data collection.** A structured interview protocol was employed, including both open-ended questions and structured rating tasks. Interviewees were asked to evaluate each of the five model dimensions and 25 elements, focusing on perceived importance, practical relevance, and interrelations between elements. Dimension External influences (D1) was rated on a ten-point scale reflecting the complexity and variability of macro-environmental factors and subsequently normalised. In contrast, Dimensions 2–5 were assessed on a three-point scale (Strong, Moderate, Weak), which was then converted to a 0–1 scale for comparative analysis. The three-point scale serves as a structuring framework for discussing elements from dimensions 2–5, which are the internal influencing factors of positioning and the outcome of positioning. Since the internal factors of positioning are the focus of the research, dimensions 2–5 were discussed in more depth. A three-point scale facilitates clarity and reduces respondent fatigue during in-depth interviews to evaluate selected model dimensions. The decision regarding the three-point scale is grounded in methodological literature that emphasises cognitive efficiency and response quality. Krosnick and Fabrigar (1997) highlight that shorter rating scales help minimize satisficing behaviour, where respondents provide superficial answers due to task complexity or fatigue, especially in studies with a high number of items. Similarly, Patton (2015) further recommends simplicity in qualitative evaluations, noting that straightforward scales can enhance the depth and clarity of participant insights. Therefore, the 3-point scale was deemed suitable for maintaining focus, improving data quality, and fostering thoughtful responses in a semi-structured interview context.

Given the use of different rating scales for external and internal BPE, normalisation was applied to ensure comparability, following established procedures in multivariate data analysis (Hair et al., 2019). To visualise relationships between elements, correlation heatmaps were generated,

as recommended in data visualisation literature (Cleveland, 1993; Field, 2013). A Pearson correlation matrix was computed for the normalised data to identify inter-element relationships and to examine the strength and direction of linear associations between BP dimensions. This method is widely applied in social sciences and management research to explore dependencies between continuous variables, particularly when data are normalised or measured on interval scales (Hair et al., 2019).

The logic and structure of the interview were guided by the five core dimensions and 25 elements of the HBPM. These were operationalised through dimension-specific questions aimed at evaluating both the theoretical soundness and practical application of each element. The mapping of the interview structure is illustrated in Fig. 3.3.

In addition to element-level ratings, Pearson correlation matrices were computed to analyse inter-element and inter-dimensional relationships within the HBPM structure. Correlation heatmaps were generated both at the element level (25 elements) and at the aggregated dimension level (D1-D5), based on normalised interview scores. These visualisations helped to identify structural alignment patterns, such as strong positive associations between strategic and performance dimensions (D3-D4) and between performance and outcome dimensions (D4-D5), which support the model's conceptual logic. Weaker correlations between D1 (external influences) and internal dimensions highlighted potential disconnects between environmental awareness and internal strategic alignment. This analytical approach enabled model validation and a deeper exploration of BP maturity across organisations (e.g., Hair et al., 2019; Field, 2013; Cleveland, 1993).

Thematic coding of open-ended responses was performed using a hybrid approach, combining deductive coding based on the predefined HBPM structure with inductive coding to capture emergent themes related to strategic alignment and innovation. Coding was conducted manually and aligned with the logic of within- and cross-case analysis (e.g., Miles, Huberman, & Saldaña, 2014), supporting analytical triangulation and enhancing interpretive validity.

To visualise the element-level distribution of BP assessments across cases, individual radar charts were created for each participating organisation. This method allowed the normalised data to be graphically represented in a format that supports within-case pattern recognition and across-case comparison (Miles et al., 2014; Yin, 2017). The visualisation technique complements numerical analysis and facilitates the interpretation of multidimensional data structures in qualitative research contexts.

As part of the in-depth interview process, a purposive subset of respondents (8 out of 13) who indicated prior experience in innovation development and implementation were asked additional questions. This extension aimed to further explore the practical applicability of the author's developed BP model in the context of innovation processes and to examine the relationship between innovation and BP.

**Interview guidelines by dimension.** To operationalise the evaluation of the HBPM, interview questions were structured around its five core dimensions and 25 elements of the updated model (see Table 3.5). Each dimension was represented by a group of targeted questions designed to assess its theoretical components, practical application, and perceived value in strategic brand management.

Table 3.5

Evaluation structure – five dimensions and 25 elements (created by the author)

| Dimension                          | Included elements                                                                                                                                                                       |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>D1: External influences</b>     | Social and cultural factors (D1.1);<br>economic factors (D1.2);<br>legal factors (D1.3);<br>technological factors (D1.4);<br>environmental factors (D1.5);<br>political factors (D1.6). |
| <b>D2: Key elements</b>            | Target audience (D2.1);<br>company & brand (D2.2);<br>team (D2.3);<br>products (D2.4);<br>competitors (D2.5).                                                                           |
| <b>D3: Strategic position</b>      | Market position (D3.1);<br>competition (D3.2);<br>recognition & relationship (D3.3);<br>brand Identity, vision, mission (D3.4);<br>brand purpose & product concept (D3.5).              |
| <b>D4: Positioning performance</b> | Differentiation (D4.1);<br>brand trust (D4.2);<br>brand image (D4.3);<br>brand equity (D4.4);<br>value proposition (D4.5).                                                              |
| <b>D5: Outcomes</b>                | Loyalty (D5.1);<br>belonging (D5.2);<br>values (D5.3);<br>status (D5.4);<br>price (D5.5).                                                                                               |

The interview protocol followed a dimension-based logic, where each thematic section was aligned with the conceptual structure of the model and aimed at capturing both subjective insights and evaluative judgments. This approach ensured consistency in data collection and facilitated the analysis of interdimensional relationships.

The structure and phrasing of questions were informed by established principles in qualitative interviewing (e.g. Miles et al., 2014; Yin, 2017) as well as best practices in brand research (e.g. Keller, 2001; Kapferer, 2012). Open-ended prompts were paired with evaluative tasks using either a 10-point or 3-point scale, depending on the nature of the dimension. This hybrid approach enabled both depth of insight and comparability across interviewees. This structure ensured respondent clarity and reduced cognitive load, particularly during in-depth qualitative

elaboration (Krosnick & Fabrigar, 1997), while facilitating cross-case comparability through the use of normalised values (Hair et al., 2019).

Given the multidimensional nature of the model, the interviews covered five thematic sections: 1) External influences, 2) Key elements, 3) Strategic positioning, 4) Positioning performance, and (5) Outcomes. This structure enabled a comprehensive evaluation of both internal and external factors influencing BP practices.

The questions were designed to:

- capture how each brand integrates external influences (D1);
- explore the definition and operationalisation of internal brand key elements (D2);
- evaluate the strategic position and coherence of positioning activities (D3);
- examine goal alignment and BP performance objectives (D4);
- assess the perceived outcomes of positioning efforts from a long-term brand value perspective (D5).

The logic and structure of the interview were guided by the five core dimensions and 25 elements of the HBPM. These were operationalised through dimension-specific questions aimed at evaluating both the theoretical soundness and practical application of each component. The mapping of the interview structure is illustrated in Fig. 3.3, which outlines the interview framework across thematic blocks, including the integration of strategic and innovation-related questions.

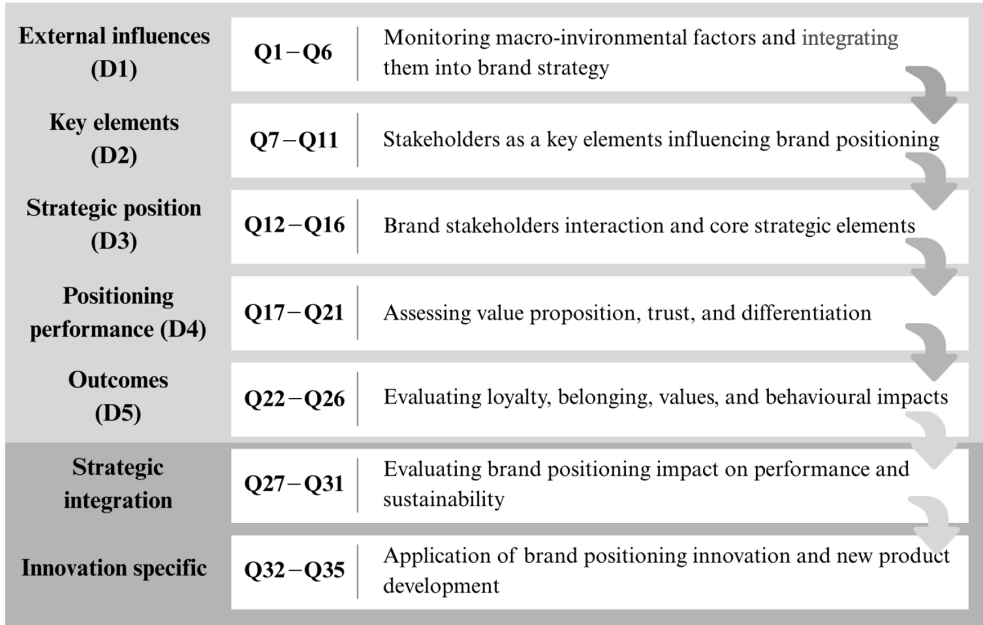


Fig. 3.3. Interview mapping framework aligned with holistic brand positioning model dimensions and strategic topics (author-developed model).

The complete set of interview questions is included in Appendix 7, grouped by dimension and annotated with brief rationales. The question design aimed not only to validate the HBPM structure but also to explore its real-world relevance and adaptability, especially in export-

oriented and sustainability-driven branding contexts. The question structure is based on a clearly defined framework (see Table 3.6).

Table 3.6

Assessment scale and question framework by dimensions (created by the author)

| Dimension | Assessment scale                           | Question framework                                                                                                                                  |
|-----------|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>D1</b> | ten-point scale only                       | Monitoring macro-environmental factors and integrating them into brand strategy. How external factors affect the organisation and brand.            |
| <b>D2</b> | three-point scale;<br>follow-up discussion | Stakeholders as key elements influencing BP.                                                                                                        |
| <b>D3</b> | three-point scale;<br>follow-up discussion | Aspects of brand and stakeholder interaction.<br>Strategic brand points related to positioning.                                                     |
| <b>D4</b> | three-point scale;<br>follow-up discussion | Focuses on assessing the strength and clarity of brand value proposition and differentiation. Brand performance and audience engagement assessment. |
| <b>D5</b> | three-point scale;<br>follow-up discussion | Evaluates results of positioning, including affective and behavioral dimensions.                                                                    |

In addition, a dedicated section was designed for respondents with innovation experience (N = 8), enabling a focused exploration of the relationship between BP and innovation success. These questions (Q32–Q35) were designed to validate the model’s relevance in product development and market entry contexts (see Appendix 7 for details). Initial expert evaluation of BP model dimensions is seen in Appendix 8, and normalised data of experts in interviews are shown in Appendix 9.

Thematic coding of open-ended responses was performed using a hybrid approach, combining deductive coding based on the predefined HBPM structure with inductive coding to capture emergent themes related to strategic alignment and innovation. Coding was conducted manually and aligned with the logic of within-z and cross-case analysis (Miles, Huberman, & Saldaña, 2014), supporting analytical triangulation and enhancing interpretive validity. Summary coding categories are presented in Appendix 10.

A hybrid thematic coding method was applied to open-ended responses, combining deductive codes based on the HBPM’s five core dimensions with inductively derived themes reflecting respondents’ strategic interpretations. The following table summarizes the coding structure used in the analysis.

**Application of the new model in innovation development.** During the in-depth interviews, it was identified that 8 out of 13 respondents had prior experience in developing and implementing innovations. These respondents were asked additional questions to further assess the practical application of the author’s created model in innovation development processes and to examine the relationship between innovation processes and BP. Specifically, they were invited to evaluate which elements of the newly developed model are most closely associated with innovation positioning and to provide justification for their choices. These interviews

served as a supplementary validation stage aimed at exploring the model’s adaptability beyond traditional BP contexts.

The results confirmed that the new model is effectively adaptable for positioning innovations, particularly at the early stages of product development. These findings were further elaborated in the publication “Positioning as a Catalyst Towards Innovations”, where additional correlations were observed, including the reciprocal relationship between innovation and business development (Strausa et al., 2023).

The interviews revealed that brand and product positioning share fundamental structural similarities, especially in how components interact with influencing factors. When developing innovative solutions, the strategic use of positioning – both before and during product development – is considered essential. The new model, in this context, provides a structured framework for developing differentiation and innovation strategies, enhancing customer relevance, and achieving competitive advantages. Companies also confirmed that promoting more effective engagement with the target audience ensures the successful commercialisation of innovations and compliance with the target audience’s needs.

Several authors emphasise innovation as a key driver of competitiveness (the importance of innovation is studied in Section 1.2.5), which is reflected in the TBPM, as well as later in the HBPM, where competitiveness is linked to the “Differentiation” element. Interviews confirmed that innovation not only enhances a company’s market position but also strengthens its pricing power and relevance, supporting the value of early-stage positioning using the framework of the developed model.

**Expert interview results and analysis.** The evaluation of the results from expert interviews was structured according to the five dimensions defined in the developed HBPM: 1) External Influences, 2) Key Elements, 3) Strategic position, 4) Positioning performance, and 5) Outcomes. Each dimension consists of several elements, and experts assessed each element based on their company's BP practices, among other things.

Refer to the full expert assessment table in Appendix 7, which presents detailed data for the evaluation of each of the 25 elements. A summary with basic data is presented in Table 3.7.

Table 3.7

Expert interview results: summary of element evaluation data (created by the author)

| Respondents |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|-------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
|             | D1.1 | D1.2 | D1.3 | D1.4 | D1.5 | D1.6 | D2.1 | D2.2 | D2.3 | D2.4 | D2.5 | D3.1 | D3.2 | D3.3 | D3.4 | D3.5 | D4.1 | D4.2 | D4.3 | D4.4 | D4.5 | D5.1 | D5.2 | D5.3 | D5.4 | D5.5 |
| A           | 8    | 7    | 7    | 9    | 10   | 8    | 3    | 3    | 2    | 3    | 3    | 2    | 2    | 3    | 1    | 2    | 2    | 3    | 3    | 2    | 3    | 2    | 2    | 3    | 2    | 2    |
| B           | 8    | 8    | 6    | 9    | 7    | 7    | 2    | 2    | 2    | 3    | 3    | 1    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    |
| C           | 9    | 9    | 7    | 9    | 8    | 8    | 2    | 2    | 3    | 3    | 2    | 3    | 2    | 3    | 3    | 3    | 3    | 3    | 2    | 2    | 3    | 2    | 3    | 3    | 3    | 3    |
| D           | 7    | 7    | 7    | 9    | 7    | 8    | 3    | 3    | 2    | 2    | 3    | 3    | 3    | 3    | 2    | 2    | 3    | 3    | 2    | 2    | 3    | 3    | 3    | 3    | 2    | 2    |
| E           | 8    | 9    | 8    | 9    | 9    | 8    | 2    | 3    | 3    | 2    | 3    | 3    | 2    | 2    | 2    | 2    | 3    | 3    | 3    | 3    | 2    | 3    | 3    | 3    | 3    | 2    |

Table 3.7 (continued)

| Respondents |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|-------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
|             | D1.1 | D1.2 | D1.3 | D1.4 | D1.5 | D1.6 | D2.1 | D2.2 | D2.3 | D2.4 | D2.5 | D3.1 | D3.2 | D3.3 | D3.4 | D3.5 | D4.1 | D4.2 | D4.3 | D4.4 | D4.5 | D5.1 | D5.2 | D5.3 | D5.4 | D5.5 |
| F           | 7    | 6    | 9    | 9    | 7    | 10   | 2    | 1    | 2    | 2    | 3    | 1    | 1    | 2    | 2    | 2    | 2    | 1    | 2    | 2    | 2    | 2    | 2    | 2    | 1    | 2    |
| G           | 7    | 7    | 7    | 8    | 9    | 8    | 3    | 1    | 2    | 2    | 2    | 1    | 1    | 1    | 2    | 2    | 2    | 2    | 2    | 2    | 1    | 2    | 2    | 2    | 2    | 2    |
| H           | 7    | 9    | 8    | 10   | 10   | 9    | 3    | 3    | 2    | 2    | 3    | 1    | 3    | 2    | 3    | 3    | 3    | 2    | 2    | 3    | 2    | 2    | 2    | 2    | 3    | 2    |
| I           | 8    | 7    | 7    | 10   | 9    | 9    | 3    | 3    | 2    | 3    | 3    | 3    | 3    | 3    | 2    | 3    | 2    | 3    | 3    | 2    | 2    | 2    | 2    | 2    | 3    | 3    |
| J           | 10   | 10   | 8    | 9    | 6    | 10   | 1    | 1    | 1    | 2    | 2    | 1    | 1    | 2    | 3    | 2    | 1    | 1    | 1    | 2    | 1    | 1    | 1    | 2    | 1    | 2    |
| K           | 7    | 8    | 7    | 8    | 10   | 9    | 2    | 2    | 1    | 1    | 1    | 1    | 1    | 2    | 1    | 1    | 2    | 2    | 1    | 1    | 2    | 2    | 2    | 3    | 2    | 2    |
| L           | 9    | 9    | 6    | 7    | 6    | 8    | 2    | 2    | 2    | 2    | 3    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 1    | 2    | 2    | 2    | 2    | 2    |
| M           | 7    | 9    | 7    | 9    | 7    | 8    | 2    | 2    | 2    | 2    | 3    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 2    |

The table below presents the assessment of each BP dimension across 13 companies (see Table 3.8), summarizing the evaluation of individual elements and indicating the average score per dimension.

Table 3.8

Average score per dimension (created by the author)

| Respondents | External influences            | Internal influences     | Internal influences           | Internal influences                | Internal influences |
|-------------|--------------------------------|-------------------------|-------------------------------|------------------------------------|---------------------|
|             | <b>D1: External influences</b> | <b>D2: Key elements</b> | <b>D3: Strategic position</b> | <b>D4: Positioning performance</b> | <b>D5: Outcomes</b> |
|             | 10-point scale                 | 3-point scale           | 3-point scale                 | 3-point scale                      | 3-point scale       |
|             |                                |                         |                               |                                    |                     |
| A           | 8.17                           | 2.80                    | 2.00                          | 2.60                               | 2.20                |
| B           | 7.50                           | 2.40                    | 1.80                          | 2.00                               | 2.00                |
| C           | 8.33                           | 2.40                    | 2.80                          | 2.60                               | 2.80                |
| D           | 7.50                           | 2.60                    | 2.60                          | 2.60                               | 2.60                |
| E           | 8,50                           | 2.60                    | 2.20                          | 2.80                               | 2.80                |
| F           | 8.00                           | 2.00                    | 1.60                          | 1.80                               | 1.80                |
| G           | 7.67                           | 2.00                    | 1.40                          | 1.80                               | 2.00                |
| H           | 8.83                           | 2.60                    | 2.40                          | 2.40                               | 2.20                |
| I           | 8.33                           | 2.80                    | 2.80                          | 2.40                               | 2.40                |
| J           | 8.83                           | 1.40                    | 1.80                          | 1.20                               | 1.40                |
| K           | 8.17                           | 1.40                    | 1.20                          | 1.60                               | 2.20                |
| L           | 7.50                           | 2.20                    | 2.00                          | 1.80                               | 2.00                |
| M           | 7.83                           | 2.20                    | 2.00                          | 2.00                               | 2.00                |

**Data normalisation for comparative evaluation.** During the development of the comprehensive BP model, external influence factors were identified as inseparable from the overall positioning context. These six elements were evaluated using a ten-point scale during



the interview process. However, in-depth attention was explicitly directed toward internal BPE and their interactions. Nineteen internal and outcome-related elements were assessed using a three-point scale, which not only enhanced clarity and reduced respondent fatigue during in-depth interviews but also enabled further qualitative elaboration. This approach reflects a hybrid evaluation method that combines quantitative structure with exploratory depth.

Given the use of different scoring scales – namely, a ten-point scale for external influences (Dimension 1) and a three-point scale for internal and outcome-related dimensions (Dimensions 2 to 5) – a normalisation process was applied to enable meaningful cross-dimensional comparison. Normalisation is essential when different measurement scales are used within a single analytical framework, as it places all values on a standard metric and eliminates bias caused by differences in scale magnitude (Hair et al., 2019).

The normalisation followed a linear transformation approach using the formula (3.1):

(3.1.)

$$\text{Normalized Score} = \frac{\text{Raw Score}}{\text{Maximum Possible Score}}$$

This method rescales the data to fall within a 0–1 range, where 0 represents the minimum score and 1 represents the highest possible rating. This normalisation enabled direct comparability between internal and external dimensions and supported subsequent hypothesis validation. For example, raw scores from Dimension 1 were divided by 10, and scores from Dimensions 2 to 5 by 3. This approach enabled a consistent assessment across all 25 elements of the model, allowing for an integrated analysis of BP maturity across participating organisations. A detailed table of normalised data at the element level is provided in Appendix 9, while normalised dimension-level scores are presented in Table 3.9 and Fig. 3.4.

Table 3.9

Normalised interview data by dimensions (created by the author)

| Dimension | AVG  | Scale max | Scale min | Normalised AVG |
|-----------|------|-----------|-----------|----------------|
| D1        | 8.08 | 10        | 1         | <b>0.79</b>    |
| D2        | 2.26 | 3         | 1         | <b>0.63</b>    |
| D3        | 2.04 | 3         | 1         | <b>0.52</b>    |
| D4        | 2.14 | 3         | 1         | <b>0.57</b>    |
| D5        | 2.24 | 3         | 1         | <b>0.62</b>    |

Normalisation procedures such as this are widely recognised in multivariate analysis and comparative case study research. According to Hair et al. (2019), standardising scales is essential when aggregating or comparing variables across different metric levels, particularly when visual or statistical synthesis is intended. Moreover, this form of min-max rescaling is aligned with best practices in quantitative social science research, particularly when working with limited samples and heterogeneous indicators (Field, 2013).

By applying this normalisation (see Appendix 9 and Table 3.9), patterns of strength and weakness in BP could be interpreted with greater analytical precision, reducing the risk of distorted results stemming from scale discrepancies. The method also supported advanced data visualisation techniques such as heatmaps and correlation matrices, which rely on comparable scales to reveal influence among model elements.

**Heatmap analysis of BP scores across dimensions.** The study of normalised average ratings across the five dimensions of the developed BP model provides insight into the relative maturity and emphasis placed on each area by participating organisations (see Fig. 3.4).

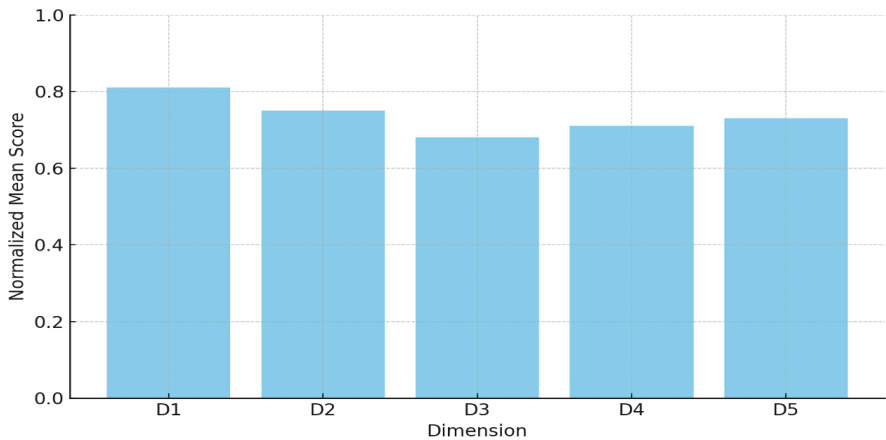


Fig. 3.4. Normalised average ratings by dimension (0–1 scale) (author’s developed framework).

The highest score was attributed to External influences (D1) (average score: 0.79), which includes elements such as social and cultural, economic, legal, technological, environmental, and political factors. This high score suggests that organisations are not only aware of macro-environmental dynamics but also actively consider these factors in shaping their BP. The external orientation appears well-developed, reflecting responsiveness to market trends and regulatory environments.

Key elements (D2), which received an average score of 0.63, encompass the foundational components necessary to operationalise BP, including target audience, company, and brand foundation, team, products, and competitors. While moderately rated, this dimension reveals that many organisations may not yet fully integrate or align these core building blocks to support a consistent and coherent positioning strategy.

The lowest score was found in the Strategic position (D3) (average score: 0.52). This dimension comprises elements such as market position, competition, recognition, relationship, brand identity, vision, mission, as well as the brand purpose and product concept. The relatively low rating suggests that organisations often lack clarity or consistency in defining their strategic positioning and struggle to differentiate themselves in the market through an articulated brand essence.

Positioning performance (D4) (average score: 0.57) reflects the perceived effectiveness of BP execution, based on differentiation, brand trust, brand image, brand equity, and value proposition. The results indicate that while some elements are acknowledged, the overall perception of how well BP is translated into measurable brand value remains limited.

Finally, the outcomes (D5) (average score: 0.62) include outcome-related elements, including loyalty, belonging, values, status, and price perception. These results suggest that although there is a reasonable foundation of customer-based brand value, the emotional connection and long-term customer engagement aspects could be further strengthened.

In summary, the findings highlight a maturity gap between external responsiveness (D1) and internal strategic consolidation (D2 and D3), with further opportunities to enhance performance and customer outcomes (D4 and D5). The results suggest that while organisations are aware of and responsive to external conditions, they may benefit from a more integrated internal brand strategy to ensure clear differentiation and value realisation in the eyes of both stakeholders and customers.

To examine the relationships between the five BP dimensions (D1–D5), the author developed a correlation heatmap based on the normalised interview data (see Fig. 3.5). Colour intensity and values indicate the average normalised score of each element on a 0–1 scale. Darker shades, closer to 1.0, represent higher evaluations, while lighter shades, closer to 0.0, reflect lower evaluations.

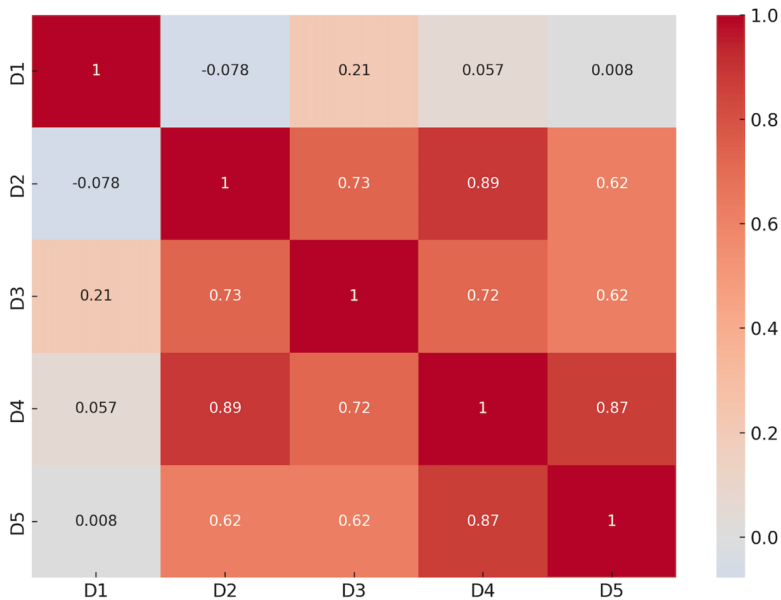


Fig. 3.5. Correlation heatmap across brand positioning dimensions (D1-D5) (author’s developed visualisation based on normalised interview data).

The analysis reveals that the strongest positive correlation is observed between Key elements (D2) and positioning performance (D4), indicating that companies with well-developed and consciously structured brand fundamentals tend to demonstrate stronger brand performance.

This includes higher evaluations in differentiation, brand trust, brand image, brand equity, and value proposition.

Additionally, strategic position (D3) also shows a notable correlation with positioning performance (D4), supporting the theoretical model, which suggests that a strategically reinforced BP focus is positively reflected in brand performance outcomes.

In contrast, external influences (D1) demonstrate weak correlations with the remaining dimensions, particularly with internal brand structure and performance-related areas. This finding aligns with previous observations; while companies perceive external factors as necessary, these are not directly integrated or reflected in internal brand structures or outcome dimensions.

**Heatmap analysis of BP scores across elements.** A Pearson correlation matrix was computed for the normalised dataset to explore inter-element relationships within the BP model. The resulting correlation heatmap (Fig. 3.6) visualises the strength and direction of associations between the 25 elements (D1.1–D5.5), providing insight into the structural consistency and interdependence across internal, external, and outcome-oriented dimensions.

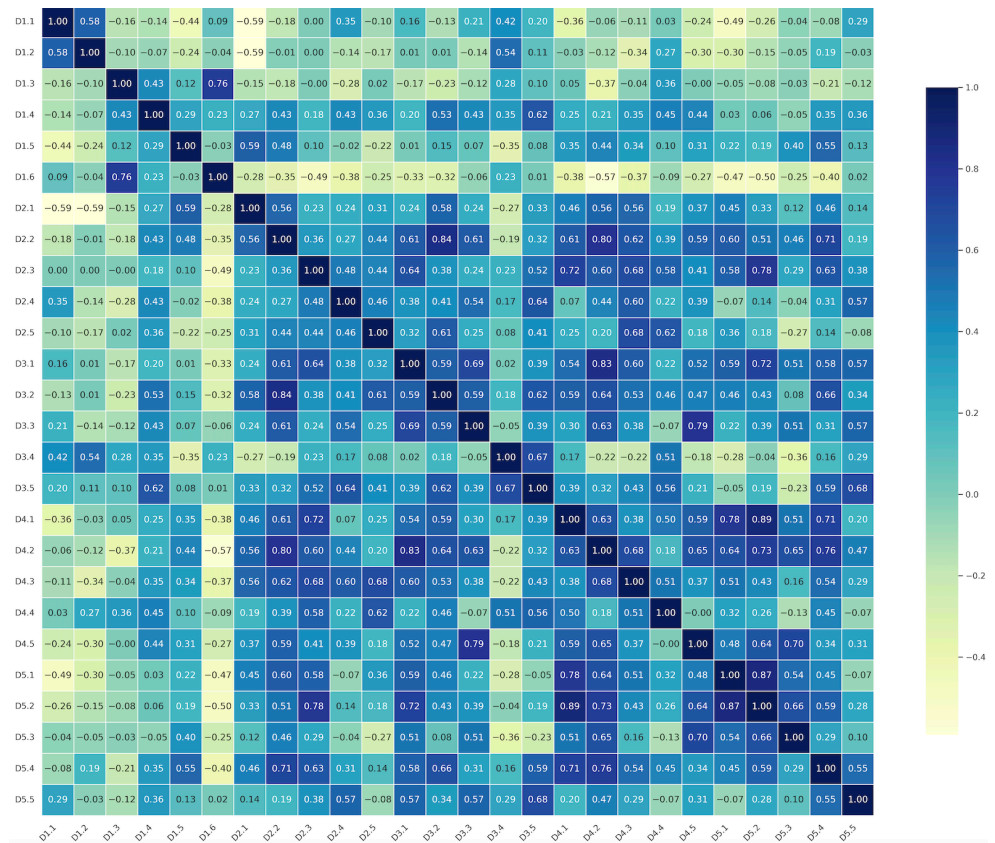


Fig. 3.6. Correlation heatmap across elements (author's developed visualisation based on normalised interview data).

Consistent with theoretical expectations, **strong positive correlations** were observed among elements within the same dimension:

External influences (D1): elements such as technological (D1.4), environmental (D1.5), and political (D1.6) are highly correlated ( $r > 0.75$ ), indicating that companies that emphasise one external factor are likely to consider others. This reflects a comprehensive external analysis approach.

Key elements (D2): very strong associations, such as between target audience (D2.1) and company & brand (D2.2) ( $r \approx 0.99$ ), suggest an integrated internal architecture where core brand structures are consistently developed.

Positioning performance (D4): strong pairings like brand trust (D4.1) and brand image (D4.2) ( $r \approx 0.98$ ), and differentiation (D4.5) and value proposition (D4.4) ( $r \approx 0.91$ ) underline the coherence between positioning effectiveness and its perception.

Outcomes (D5): elements such as loyalty (D5.1) and belonging (D5.2) ( $r \approx 0.98$ ) are closely linked, highlighting the emotional and relational aspects of brand success.

Several meaningful **cross-dimensional correlations** support the theoretical framework of the HBPM:

Products (D2.4) correlate strongly with value proposition (D4.4) ( $r \approx 0.96$ ), suggesting that clearly defined offerings directly contribute to perceived brand value.

Brand identity, vision, and mission (D3.2) show a high correlation with brand equity (D4.3) ( $r \approx 0.94$ ), reinforcing the conceptual link between internal clarity and accumulated brand value (Aaker, 1996; Keller, 2013).

Brand purpose & product concept (D3.3) aligns closely with values (D5.3) ( $r > 0.95$ ), indicating that internal brand meaning strongly influences perceived brand values.

Target audience (D2.1) correlates with loyalty (D5.1) ( $r \approx 0.91$ ), underscoring the role of audience understanding in fostering sustained relationships.

These results collectively demonstrate that brands with clearly articulated internal structures (D2–D4) are more likely to achieve superior outcomes (D5).

Elements within external influences (D1) generally exhibit low correlations ( $r < 0.3$ ) with internal and outcome-related dimensions (D2–D5), indicating a limited integration of external factors into core BP strategies. This supports the notion that external context, although recognised, is analysed separately and not always directly integrated into brand strategy development. These findings align with SM theory (Porter, 2008), which posits that external factors shape the environment but do not dictate internal structure.

For instance, technological (D1.4) correlates weakly with most outcome variables, suggesting that innovations may be considered operational rather than identity-forming. This validates the methodological choice to treat D1 as an external, foundational layer rather than an internal construct.

Certain elements show relatively **low or isolated correlations**: status (D5.4) and price (D5.5) exhibit weaker links with the rest of the model, suggesting that these outcomes are either industry-specific or interpreted variably across organisations. Their positioning may be influenced more by market dynamics than by internal branding.

The findings of the correlation analysis provide strong empirical support for the theoretical assumptions underpinning the HBPM, particularly the importance of internal coherence (Aaker, 1996; Kapferer, 2012), the connection between identity and emotional outcomes (Keller, 2013), and the relative independence of external contextual factors (Porter, 2008). The results align with the view that integrated brand systems foster strategic clarity and long-term brand performance (de Chernatony, 2010).

Strategic BP is not only about market claims, but also about internally aligned systems that translate into authentic and consistent external experiences.

Moreover, while external factors are recognised, their low correlation with internal positioning suggests a disconnection between environmental scanning and strategic action. Bridging this

**Heatmap analysis of BP scores across organisations.** The author also examines cross-organisational patterns in BP by analysing the heatmap of normalised element scores across organisations (see Fig. 3.7). The heatmap visualises the evaluation of each organisation (A–M) across 25 BPE, based on normalised values on a scale from 0 to 1. Darker blue tones indicate higher scores in a given element, while lighter areas reflect relatively lower evaluations.

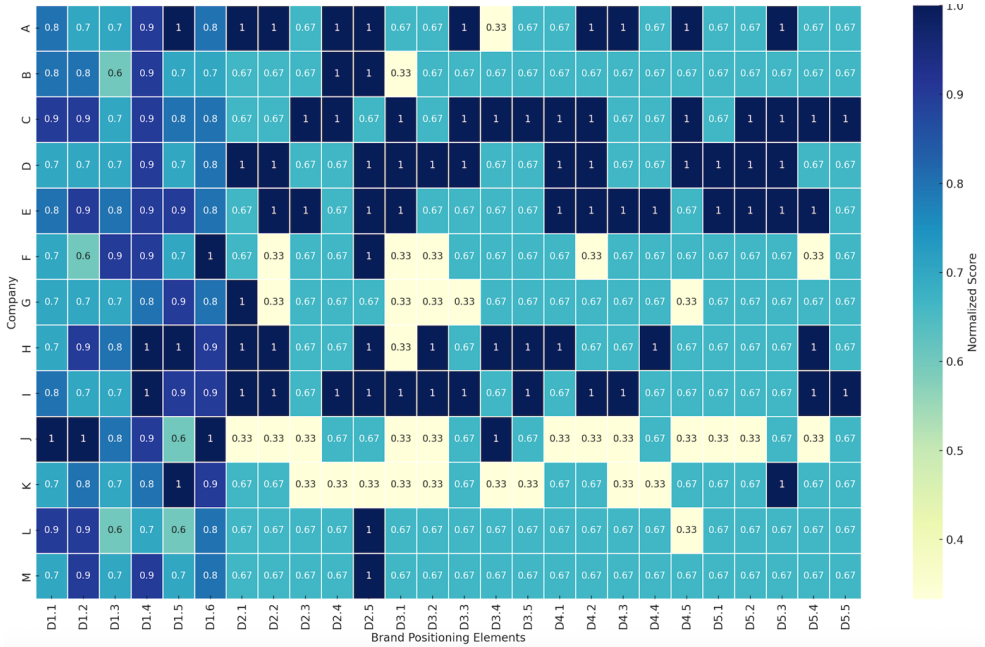


Fig. 3.7. Correlation heatmap across organisations (author’s developed visualisation based on normalised interview data).

Several companies consistently demonstrate **high scores** in specific areas, including technological (D1.4), environmental (D1.5), target audience (D2.1), company & brand (D2.2), brand equity (D4.3), and brand image (D4.2). These elements frequently exceed a value of 0.90, suggesting a high level of maturity. This indicates that many organisations have successfully positioned themselves with technological advancements and audience targeting while maintaining a strong market perception of their brand.

**Considerable differences** are observed across organisations in elements such as team (D2.3), recognition & relationship (3.1), brand identity, mission, vision (D3.2), market position (3.4), differentiation (4.5), and value proposition (4.4). Some companies score highly, while others fall significantly behind, suggesting uneven implementation of brand strategy practices across organisations.

Loyalty (D5.1), belonging (D5.2), status (D5.4), and price (D5.5) tend to receive **medium or lower evaluations** across many companies. This may indicate that emotional customer engagement and value communication remain in a developmental phase for a significant portion of the sample.

Companies such as C, D, E, and I exhibit consistently high and balanced scores across elements, reflecting a well-structured and strategically coherent BP approach. In contrast, companies such as F, G, J, and K show a more fragmented pattern with several low or medium scores, possibly indicating a phase of strategic adjustment or brand restructuring.

The heatmap provides an intuitive overview of the BP landscape across the sample, highlighting both areas of strength and dimensions that require further development. This visualisation serves as a strategic diagnostic tool, enabling managerial teams to identify focal points for strengthening BP and achieving greater alignment across internal and outcome-oriented dimensions.

A summary of element-level assessments within organisations, including the highest- and lowest-rated positioning elements per company, is presented in Fig. 3.8. This figure offers a comparative overview of the performance of organisations (A–M) across the complete set of BPE.

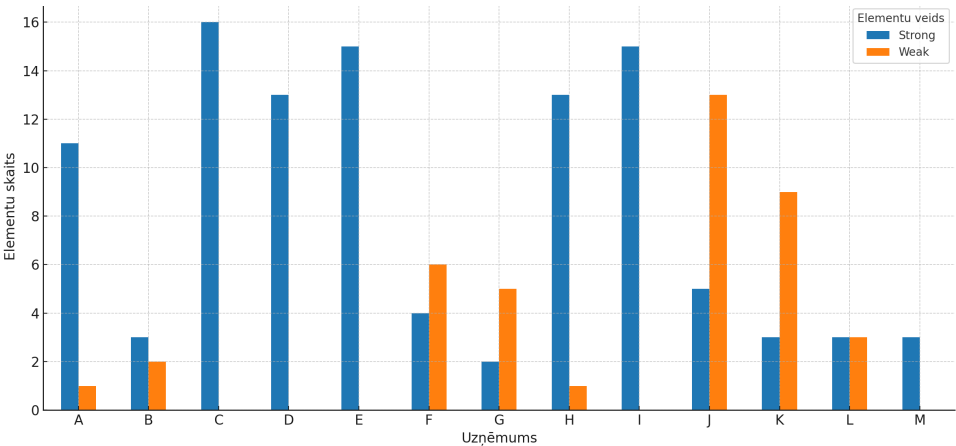


Fig. 3.8. Distribution of strong and weak elements across organisations (A–M) (author’s developed visualisation).

The analysis is based on normalised values ranging from 0 to 1. Elements rated 0.90 or above are considered strong points, reflecting a high level of development and strategic clarity. Elements rated below 0.666 are classified as weak points, as they fall within the statistically

low range on the three-point evaluation scale used during the interviews. Scores between 0.666 and 0.899 are interpreted as moderate and are not classified as either strengths or weaknesses. To provide a more granular view of how individual organisations perform across the 25 elements of the HBPM, individual radar charts were generated for each company (Organisations A–M). An overview is presented in Fig. 3.9, while detailed charts for each organisation are included in Appendix 12.

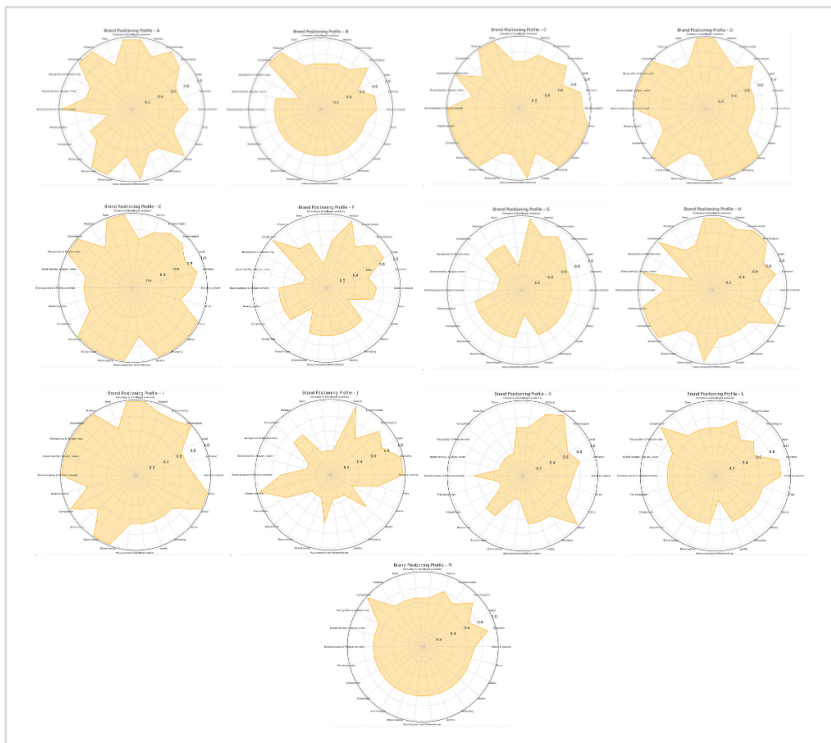


Fig. 3.9. Overview of radar chart profiles across organisations (author’s developed visualisation).

These visual profiles illustrate the normalised evaluation results of each element on a 0–1 scale, providing an intuitive overview of BP strengths and gaps.

As shown in Appendix 12, the profiles reflect the unique strategic focus areas of each organisation and allow for comparative analysis across internal and external BP components. This analysis enables a quick diagnostic of BP maturity across organisations, helping to identify both areas of excellence and those requiring focused development. The differentiated performance across organisations highlights strategic imbalances, offering a foundation for targeted improvement efforts and benchmarking practices.

**Hypothesis validation and the strategic role of BP in innovation.** The in-depth interviews conducted with 13 senior-level experts confirmed the hypothesized relationships between BP and both OP and innovation development. Respondents unanimously agreed that the **integration of BP into SM processes** strengthens long-term focus and fosters ongoing



development. Questions 27–31 (see Appendix 7) specifically addressed this strategic relevance, and responses consistently highlighted the continuing inclusion and prioritisation of BP in organisational decision-making.

These findings fully validate the study's hypotheses by empirically confirming that **effective BP enhances strategic clarity**, promotes OS, and is viewed as a key driver of competitive advantage across industries and company sizes.

A subset of respondents (N = 8) with prior experience in innovation development provided additional insights (Questions 32–35, see Appendix 7), further extending the model's applicability beyond traditional branding. Interviewees emphasised that a clear brand position acts as a “strategic filter and focus mechanism” during innovation processes, guiding product differentiation, market entry strategies, and communication consistency.

As five respondents (63 %) noted, “The model works even better for innovation because it sharpens the unique value that the innovation must communicate.” This insight supports the view that the model is not only applicable for evaluating BP maturity but also catalyses **innovation management**.

These results align with prior research, which suggests that product positioning and BP rely on similar structural mechanisms. As outlined in the publication “Positioning as a Catalyst Towards Innovations”: “In the development of new products, positioning is carried out in the same way as in the development of a brand, and similar interactions with influencing factors and components are formed as in the positioning of a brand. When developing new products, it is valuable to use targeted product positioning even before the start of development.” (Strausa et al., 2023).

This integration of strategic brand thinking and innovation logic further demonstrates the conceptual robustness and practical versatility of the HBPM. It not only ensures positioning consistency across the organisation but also enhances the ability to focus on uniqueness, a crucial component for innovation success.

**Scientific justification for including External influences (D1) in the HBPM.** During the development of the final HBPM, external Influences (D1) emerged as structurally distinct from the internal and outcome-oriented dimensions (D2–D5). While the internal dimensions capture stakeholder alignment, strategic intent, brand performance, and perceived outcomes, D1 reflects the brand's relationship with its broader macro-environment – social, economic, technological, political, legal, and environmental factors.

Qualitative data analysis revealed that although D1 exhibits lower statistical correlation with other dimensions, it holds high conceptual and managerial relevance. Therefore, a deeper inquiry was conducted into the scientific validity and strategic justification for including D1 in the final model. The findings confirmed that D1 is an essential structural component, serving as the contextual foundation upon which internal positioning is constructed.

- **Theoretical Integration and Holistic Consistency:** In holistic brand management approaches, the brand is embedded within a dynamic and interconnected ecosystem (Urde, 2003; Kotler et al., 2016). External influences shape brand meaning, relevance,

and legitimacy. Including D1 ensures that the model aligns with strategic branding theories that emphasise the importance of contextually grounded positioning decisions.

- Low statistical correlation does not imply conceptual insignificance: The lower correlation coefficients observed between D1 and internal dimensions in the correlation heatmap analysis do not indicate irrelevance. Instead, they reflect the distinct functional role of D1 – as a contextual input rather than a reactive outcome. This supports the view of D1 as an “entry layer” (Keller, 2008) that precedes and shapes internal brand architecture.
- Empirical validation from interviews: Executives consistently rated D1 as the most developed dimension, particularly in terms of monitoring technological, environmental, and political factors. Despite its independence from operational components, the high awareness and perceived importance reported by respondents highlight D1’s strategic value in BP processes.
- Model usability and strategic adaptability: The inclusion of D1 enables the model to function not only as a diagnostic tool for internal brand coherence but also as a forward-looking management system. It allows internal strategies to remain responsive to changing environmental forces, thus increasing the model's agility and real-world relevance in dynamic industries.

The author concludes that external influences (D1) are not only appropriate for inclusion in the final HBPM but constitute a critical structural foundation. Its separation from internal elements enhances rather than undermines the model’s coherence. Including D1 ensures that the model reflects the dual influence of internal alignment and external awareness, transforming it from a static diagnostic tool into a strategic system that embraces complexity and change.

**Strategic implications and key conclusions based on correlation analysis.** Key findings about the interaction of dimensions and their elements when analysing the interview results:

- High internal coherence between D2, D3, and D4 indicates that the more clearly a company defines its foundational brand components, such as its target audience, internal team, and competitive understanding (D2), the more likely it is to develop a coherent strategic position (D3) and to demonstrate strong Positioning performance (D4).

Implication: Companies that invest in refining key brand elements, by clearly identifying their brand essence, market role, and organisational alignment, are better positioned to formulate effective, differentiated strategies that translate into stronger marketplace performance.

- Strong links between strategic clarity and emotional outcomes highlight that when brands articulate a clear purpose, value proposition, and identity, this resonates more deeply with their audiences. Such clarity fosters emotional engagement, expressed through customer loyalty, shared values, and a sense of belonging (D5). Implication: Defining and communicating a consistent brand mission, values, and identity not only strengthens brand recognition but also fosters customer affinity, which is increasingly critical in loyalty-driven markets.

- Lower integration of external influences (D1) with internal dimensions suggests that, while organisations may monitor social, technological, political, or environmental factors, these are often treated as external constraints or inputs, rather than being fully embedded into strategic brand thinking.

Implication: This reflects a missed opportunity – by not linking environmental awareness directly with brand strategy, companies may fail to capitalise on trends or adapt proactively. Integrating external dynamics more deeply into internal positioning could enhance brand agility and relevance.

- The independent behaviour of certain elements, such as Status and Price, suggests that these aspects may either vary significantly across industries or be driven more by market mechanics than internal strategy.

Implication: This calls for sector-specific refinement of positioning strategies – brands in premium, price-sensitive, or status-driven categories may need to tailor their positioning logic more carefully, instead of applying a uniform model.

In essence, the analysis confirms that internal clarity and coherence (especially across key brand elements and strategic position) serve as a foundation for stronger performance and customer outcomes. Strategic BP is not only about market claims, but also about internally aligned systems that translate into authentic and consistent external experiences. Summary of correlation analysis in Table 3.10.

Moreover, while external factors are recognised, their low correlation with internal positioning suggests a disconnection between environmental scanning and strategic action. Bridging this gap could significantly enhance the brand's resilience and competitive edge.

Table 3.10

Summary of correlation analysis of holistic brand positioning elements (created by the author)

| Strength of influence | Influence of elements                                                                                               | Result and implication                                                                                                                                                                                                                                                                                                                             |
|-----------------------|---------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| High                  | Internal coherence between dimensions key elements (D2), strategic position (D3), and positioning performance (D4). | Result: clearly defined foundational brand components, such as target audience, internal team, and competitive understanding coherent strategic position and strong brand performance. Implication: refining key brand elements allows to identify more effective, differentiated strategies that deliver stronger performance in the marketplace. |

Table 3.10 (continued)

| Strength of influence | Influence of elements                                                                                                                                                                                  | Result and implication                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strong                | Strong links between strategic position (D3) and outcomes (D5): brand identity, mission, vision (D3.2), brand purpose & product concept (D3.3) and loyalty (D5.1), belonging (D5.2) and values (D5.3). | <p>Result: A strong link between strategic clarity and results indicates that the clearer the strategic position, the stronger the customer loyalty, shared values and sense of belonging are formed.</p> <p>Implication: Defining and communicating a consistent brand mission, values, and identity not only strengthens brand recognition but also fosters customer affinity. Strong links between strategic positioning elements, such as brand identity, purpose, and product concept and emotional outcomes, including loyalty, belonging, and shared values highlight that brands that articulate a clear internal identity tend to foster deeper emotional engagement with their audiences.</p> |
| Lower                 | Lower integration of external influences (D1) with internal dimensions (D2-D5).                                                                                                                        | <p>Result: Organisations may monitor social, technological, political, or environmental factors; these are often viewed as external constraints or inputs rather than fully integrated into strategic brand thinking.</p> <p>Implication: The external environment is understood but not necessarily integrated into the positioning strategy. without linking external awareness to brand strategy, companies may struggle to capitalise on trends or proactively adapt.</p>                                                                                                                                                                                                                           |
| Independent           | Independent behaviour of elements status (D5.4) and price (D5.5).                                                                                                                                      | <p>Result: These elements are perceived and evaluated independently across companies: there is no statistically significant linear relationship between elements.</p> <p>Implication: This may reflect divergent positioning strategies within industries. It also indicates that price sensitivity and perceived symbolic value do not inherently reinforce each other, highlighting the need for context-specific interpretation in brand outcome dimensions.</p>                                                                                                                                                                                                                                     |

These empirical insights underscore the strategic relevance of the HBPM framework, validating its internal logic and inter-dimensional alignment. From a managerial perspective, the results emphasise the importance of structuring internal brand dimensions cohesively to maximize

performance and emotionally resonant outcomes, while also suggesting opportunities to enhance responsiveness by integrating external environmental insights more effectively.

In conclusion, the integration of statistical and qualitative insights confirms the structural and conceptual robustness of the HBPM. The correlation-based analysis not only reinforces the model's theoretical assumptions but also highlights its practical value in assessing BP maturity, guiding strategic alignment, and informing innovation-oriented BD. Future applications of the model may further explore its adaptability across industries and its role in enhancing strategic cohesion between internal brand architecture and external environmental dynamics.

In addition to validating the relevance and interrelationships of individual BPE, the expert interviews confirmed the conceptual clarity of the overall model structure. Specifically, respondents endorsed the logical grouping and terminology of the five core dimensions and their respective 25 elements, as defined in the framework "Evaluation structure – five dimensions and 25 elements" (see Table 3.5). The placement of elements within the matrix was also supported, thus affirming both the internal logic and external applicability of the model.

Importantly, the findings offer actionable insight for brand and business leaders. By identifying internal elements most strongly associated with brand performance and customer outcomes, the model serves as a diagnostic framework that can inform investment decisions and prioritisation efforts. Management teams can leverage these insights to refine core brand foundations, such as audience segmentation, identity definition, and value proposition, thus enhancing positioning effectiveness and long-term brand equity.

Beyond its relevance for brand evaluation, the model also proved highly effective in innovation contexts. Respondents with experience in innovation development emphasised that a clearly defined brand position provides a strategic lens for shaping new product initiatives, articulating uniqueness, and maintaining coherence in messaging. As one participant noted, "The model works even better for innovation because it sharpens the unique value that the innovation must communicate." This supports prior conceptual work suggesting that the mechanisms of product and BP share common structural logic. Therefore, the HBPM can be viewed not only as a tool for evaluating brand maturity but also as a catalyst for innovation, helping organisations align internal structures with emerging opportunities and sustain differentiation in dynamic environments.

### **3.4.3. Practical application of the HBPM model for new brand development and strategic positioning**

To demonstrate the applicability of the HBPM in practice, the model was applied within the Latvian ice cream (the brand *Druva Ice Cream*) and ice cubes (the brand *Druva Ice*) manufacturer Tērvete Food Ltd. A new brand, *Joy for Tails*, an innovative ice cream product specifically designed for dogs, was developed for launch in export markets. The author led the brand and product implementation following the HBPM framework, ensuring strategic alignment with all five dimensions and their corresponding 25 elements.

**Development background and new product development project support.** The idea to create a new brand and product line emerged in 2022, driven by strategic ambitions to diversify

the company's portfolio and enter new market segments. The development process officially began in February 2023 with the initiation of an EU-funded innovation project titled "Development of New Products – Ice Cream for Pets", implemented under the Research Project No. 5.1.1.2.i.0/1/22/A/CFLA/003 (8).

The project was executed in seven structured stages and continued through to the end of 2024. It was designed to support the end-to-end development and implementation of novel functional pet treat products, including the formulation, testing, and positioning of the *Joy for Tails* brand. The roadmap for the new product development project is presented in Appendix 13, outlining the key phases of product development and launch preparation.

The main objective of the project was to develop and introduce three innovative products within the Baltic market, representing a unique category of dog-friendly frozen treats. In addition to the product outcomes, the initiative also facilitated the acquisition of new competencies in functional pet food development, which are expected to support future category expansion and contribute to the broader advancement of the pet food industry in the region. The approach to brand and new product introduction is adjusted according to the structure reflected in Fig. 3.11, which corresponds to the HBPM model structure:

### **External influences (D1).**

The brand concept was rooted in a careful analysis of macro-environmental factors. Social and cultural factors (D1.1), such as the growing humanisation of pets and increasing demand for premium pet care, indicate a strong emotional relevance for the product.

Economic factors (D1.2) supported this trend's direction, with growing consumer spending in the pet food and treat sector across the EU and the U.S.

Technological factors (D1.4), including cold chain logistics and lactose-free production techniques, enabled the project's feasibility and scalability.

The use of environmentally conscious and functional ingredients and packaging responded to sustainability demands (Environmental factors (D1.5)).

Attention was also paid to Legal factors (D1.3) and Political factors (D1.6), particularly veterinary food regulations and export requirements, to ensure product compliance across markets.

### **Key elements (D2).**

Particular emphasis was placed on identifying and understanding the target audience (D2.1). In this process, both dogs and their owners were involved in product testing, taste validation, and concept evaluation. To complement the qualitative insights, a quantitative study involving more than 470 dog owners was conducted by team member and marketing lead Ieva Vavule as part of her Master's Thesis at Rīga Stradiņš University. The study examined audience perceptions, market entry expectations, and competitive advantage (Vavule, 2024).

The company–brand alignment (company & brand (D2.2)) was strengthened by embedding the new brand in the quality-driven values of *Druva Ice Cream*. The product development team (D2.3) was carefully assembled, involving researchers from the Latvian University of Life Sciences and Technologies – veterinarians, pet nutrition specialists, and food technologists – alongside the internal marketing and production team. This cross-disciplinary collaboration

ensured that the product (D2.4) was not only safe and appealing but also nutritionally beneficial, featuring functional ingredients like inulin, spirulina, and turmeric, with no added sugar or lactose. As part of the project, an extensive prototyping phase was carried out, resulting in the development of 58 initial product prototypes, followed by an additional 20 prototypes incorporating functional additives. In total, 78 product prototypes were created and submitted for testing, reflecting the project's commitment to scientific rigor, formulation precision, and user-centered product validation. Further insight into the prototype development process, pilot scaling in the production environment, and the structured testing phase can be found in Appendix 14, which documents the practical stages of product iteration and validation.

Competitor analysis (competitors (D2.5)) revealed a market niche that *Joy for Tails* saw as an opportunity to occupy as a unique, high-quality offering in the premium pet treat segment. Uniqueness is ensured through special product customisation, utilizing a scientific approach and a manufacturing process registered as friendly to both dogs and humans, which provides a high-quality guarantee.

### **Strategic position (D3).**

The brand's market position (D3.1) was defined as an innovative, health-conscious indulgence for dogs, positioned between functional pet nutrition and emotional reward. Its competitive distinction (competition (D3.2)) lies in its product concept, quality ingredients, and the credibility of its parent brand.

Audience engagement (recognition & relationship (D3.3)) was prioritised through early-stage brand ambassadorship, event participation, and niche community outreach. Events are supported, and engagement with specific audience groups is encouraged, also attracting appropriate ambassadors when working with communes.

Brand identity, vision, and mission (D3.4) were crafted to express the core promise of "joyful moments shared between pets and their owners," aligned with values of care, playfulness, and quality.

The brand purpose and product concept (D3.5) were defined with precision, highlighting the unique emotional and functional value the product offers to pet owners.

### **Positioning performance (D4).**

A strategic focus was placed on differentiation (D4.1), given the ambition to innovate within a traditionally local and conventional company context. The product's formulation, packaging, and brand narrative stand out within the emerging pet lifestyle category.

Brand trust (D4.2) is built through transparency in production, science-based formulation, and safety assurances.

Brand image (D4.3) is carefully shaped via high-quality storytelling, design coherence, and responsible messaging.

Brand equity (D4.4) benefits from association with the well-known *Druva Ice Cream* name locally. And, considering the engagement activities, brand equity is also successfully promoted among a new audience through a scientifically based and veterinary-supported concept.

At the same time, the Value proposition (D4.5) is dual-layered, offering both functional health benefits and emotional co-consumption experiences.

## **Outcomes (D5).**

While in early launch stages, the strategy is oriented toward long-term outcomes. Customer loyalty (D5.1) is cultivated through product quality, emotional resonance, and anticipated future product line extensions.

A sense of belonging (D5.2) is fostered through active community engagement, including participation in targeted dog-owner events and creation of a relatable brand voice. Belonging is fostered by collaborations with carefully selected ambassadors – dog profiles in product reviews, opinions, and reviews from dog-friendly social sites.

Shared values (D5.3), such as joy, connection, and animal well-being, are central to brand communication. Marketing efforts also focus on values. Strategic partnerships, thoughtfully selected campaign ambassadors, and consistent value-based messaging are central to creating a trustworthy and emotionally resonant brand narrative.

Positioning aims to appeal to modern pet owners seeking aspirational lifestyle products (status (D5.4)). The company ensures that price perception (price (D5.5)) is still available within the premium level.

The structured application of the comprehensive HBPM approach in the development of *Joy for Tails* demonstrates the model's integrative strength and practical value. Through the alignment of external context, internal coherence, strategic clarity, and emotional engagement, the brand was built to meet both innovation and export-readiness requirements. This business case illustrates how a multidimensional positioning framework can drive strategic innovation, boost product credibility, and foster long-term brand equity in a niche market.

**Touchpoint management and brand image formation – practical application in *Joy for Tails*.** During the empirical research and practical implementation of the *Joy for Tails* brand, the author developed an additional conceptual model: The brand, customer, and third-party touchpoints in the context of brand image development. This model emerged from the need to better understand how brand image is shaped not only by internal positioning elements but also by the interactions among brand-driven communication, team behavior, and third-party influence. By integrating theoretical perspectives with insights gained during the development and market introduction of a new brand, this framework highlights the multiple layers of brand perception formation. It reinforces the importance of strategic alignment across touchpoints. The model is presented in Fig. 3.10 and complements the broader HBPM logic by offering a touchpoint-based perspective on brand image formation. In developing the *Joy for Tails* brand, particular attention was paid not only to BPE (as outlined in the HBPM) but also to the strategic alignment of brand and customer touchpoints that shape the brand image. The brand image was shaped through coordinated efforts across three influence layers: the brand itself, the internal team, and external third parties (see Fig. 3.10).



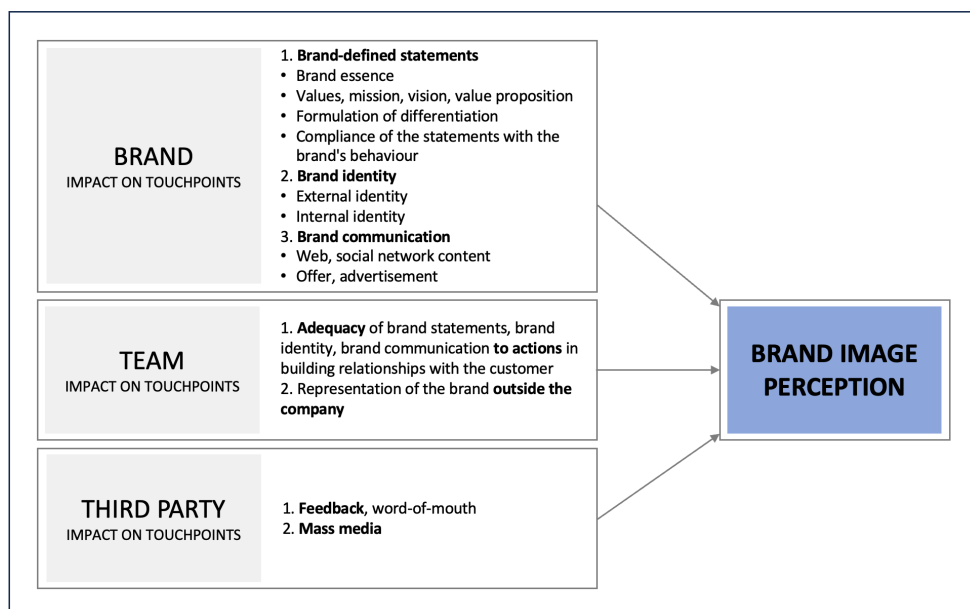


Fig. 3.10. The brand, customer and third-party touchpoints in the context of brand image development (author's developed framework, novelty).

In the framework of this study, the concept of brand image formation is examined not solely because of internal brand communication efforts but rather as an outcome of interactions across multiple touchpoints. As illustrated in Fig. 3.10, the perception of brand image is shaped by the coordinated influence of three key actor groups: the brand itself, the internal team, and external third parties.

**1. The brand's impact on touchpoints.** The brand's direct influence on touchpoints is structured around three dimensions.

- Brand-defined statements, such as brand essence, values, mission, vision, and value proposition, as well as the articulation of differentiation and the alignment of these statements with actual brand behaviour.
- Brand identity encompasses both internal and external elements, forming the foundation upon which the brand is recognised and interpreted.
- Brand communication encompasses online presence (including website and social media content), advertising, and other market-facing messages.

**2. The team's impact on touchpoints.** Employees play a critical role in translating brand strategy into action: they ensure the adequacy of brand statements, identity, and communication by aligning them with concrete customer-facing actions and relationship-building behaviors. The team also serves as a key vehicle for representing the brand beyond formal channels, influencing perceptions through their conduct and external engagements.

**3. Third-party impact on touchpoints.** External agents, including feedback and word-of-mouth from customers or users, and mass media coverage, contribute significantly to how the brand is perceived in broader public narratives, often outside the company's direct control.

**Brand Image Perception.** The combination of these three influence sources – brand strategy and communication, team execution, and third-party interpretation – shapes how the brand is perceived across markets and customer segments. This model provides a comprehensive view of brand image formation, aligning with the strategic logic of the HBPM, which emphasises the need to strike a balance between internal coherence and external alignment to achieve a positive brand perception.

This integrated management of brand-related touchpoints contributed significantly to the formation of a consistent and emotionally resonant brand image for *Joy for Tails*, aligning with the intended strategic positioning and enhancing perception across both B2C and B2B audiences.

Currently, the company is promoting the brand on the international market by participating in international exhibitions, expanding into new export countries, and incorporating new product development activities for the *Joy for Tails* brand into its strategic development plan. For a marketing material communication example of *Joy for Tails*, see Appendix 15. Investments have been allocated for the construction of a new production facility and the purchase of equipment to develop future products for the new brand.

The brand's communication strategy is publicly accessible through its official website and social media channels. Additionally, several articles published on online platforms offer further insights into the brand's development and positioning.

It should be noted that the brand *Joy for Tails* is undergoing a transition to *Joy for Friends* due to a complaint submitted to the EU Intellectual Property Office concerning the verbal use of the word "Tails." Regardless of the outcome, the company has proactively initiated the brand transition, recognising the opportunity to strengthen communication around the shared interaction between pet owners and their dogs, as well as the concept of a product designed to be enjoyed by both.

**Scientific publications supporting the brand and product development process.** As part of the development of the new brand and product line, three scientific publications have been produced, offering insight into different aspects of the innovation process, from product formulation to BP and strategic integration.

1. "Physical, Rheological and Nutritional Properties of Plant-Based Frozen Dessert" (Zagorska et al., 2024) – this publication presents findings from experimental research on the formulation of plant-based frozen desserts, which served as a foundational step in the development of dog-friendly frozen treats. Key conclusions include that the chemical composition of plant-based ingredients has a significant impact on the hardness and overrun of frozen desserts.

Incorporating vegetables into frozen dessert formulations allows for a notable reduction in sugar and fat content, or even complete sugar elimination, providing a healthier alternative.

Different vegetables (such as sweet potatoes, beets, carrots, and potatoes) influence the viscosity and melting behaviour of the product, with carrot-based samples showing particularly distinct rheological properties.

2. "Embedding Brand Positioning within Strategic Management" (Strausa & Gaile-Sarkane, 2024) – the conceptual framework and strategic management principles presented in this publication were applied during the BD phase. The key findings include:

- BP is increasingly recognised as a critical element of the SM process;
- when integrated into strategic decision-making, BP significantly enhances organisational competitiveness, performance, and long-term sustainability;
- managerial involvement in positioning activities strengthens the relationship between strategic BP and business outcomes;
- perceptions of BP relevance and its impact vary depending on the industry and the level of executive engagement.

3. “Snacks and Ice Cream as Complementary Dog Feed: Perspectives, Trends, Ingredients” (Freiberga et al., 2025) – this publication explores market trends and formulation insights relevant to the growing niche of dog-friendly frozen treats. The main conclusions are:

- dog ice cream represents an emerging category in the pet food industry, offering an innovative way to reward pets while addressing their nutritional needs;
- careful ingredient selection ensures that such products are safe, nutritious, and enjoyable for companion animals;
- successful market positioning of dog ice cream aligns with the growing societal trend of treating pets as family members;
- to meet consumer expectations, companies must focus on health-oriented benefits, transparent labelling, and a clearly defined product position.

The development and market introduction of the *Joy for Tails* brand illustrates the practical applicability and strategic value of the HBPM in a real business environment. By aligning external context analysis, internal brand coherence, strategic clarity, and desired outcomes, the model provided a structured framework that guided the creation of an innovative product and a purpose-driven brand, tailored for international expansion.

The case further highlights the model’s versatility, not only in supporting initial concept development and market readiness but also in driving innovation and organisational learning. The integration of research-based formulation, customer insight, team collaboration, and brand strategy, fully aligned with the HBPM structure, resulted in the launch of a differentiated offering in a rapidly evolving market niche.

Thus, the HBPM has been validated for practical application, offering a comprehensive and multidimensional approach to BP that facilitates successful market advancement and the development of long-term brand equity.

The following section presents the HBPM in its final structure, offering a detailed conceptual overview of its five dimensions and 25 elements, supported by empirical validation and theoretical grounding.

### 3.5. Development of a final holistic brand positioning model

The author develops the new BP model HBPM to address the previously identified scientific gap (see Section 1.3) and comprehensively covers the dimensions and elements involved in BP. The model presented is a validated and empirically tested framework, confirmed through a multi-stage research process and practical application. The introduced structure of the HBPM, as illustrated in Fig. 3.11, is hereby confirmed and validated.

#### 3.5.1. Conceptual structure and theoretical foundations of the HBPM

The newly developed model helps create BP by identifying, defining, and developing their market position and perception among the target audience. Positioning-based SM ensures BD for an efficient, sustainable, and profitable business.

During the refinement process, several structural adjustments were made to transform the TBPCM into the validated HBPM. Element names were clarified and standardised to ensure conceptual precision; the placement of certain elements was rearranged to reflect their interdependencies better; and an additional dimension – external influences – was incorporated to capture broader environmental factors shaping brand positioning. These modifications strengthened the model’s internal logic and enhanced its applicability across organisational contexts.

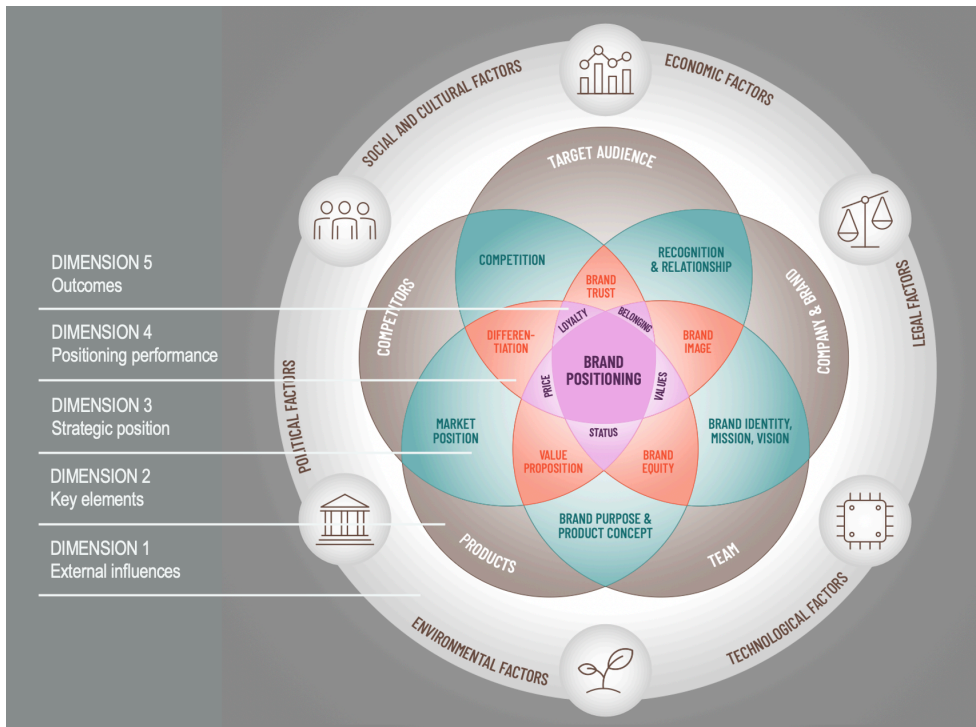


Fig. 3.11. Validated the holistic brand positioning model (author’s developed and validated framework, scientific novelty).

The final stage of consolidating the HBPM integrates all previous research phases into a fully developed and validated HBPM. The process integrates theoretical constructs, empirical validation, and practical application results to form a comprehensive model that reflects the dynamic interplay between internal capabilities and external BP imperatives.

Building upon the structured development process, which includes the initial conceptualisation (TBPCM), expert evaluations in focus groups, application in a real-world brand creation, and strategic integration analysis, the HBPM is finalised as a multidimensional framework encompassing five strategic dimensions. Each dimension is grounded in branding theory and supported by empirical insights. Methodologically, this phase relies on integrative synthesis, which enables the cross-validation of findings from qualitative evaluations, strategic application, and hypothesis-based quantitative analysis. The consolidation affirms the model’s internal coherence, relevance, and applicability for strategic BD, especially in export-driven and innovation-oriented business contexts.

**The structure of the HBPM.** Structure is designed as a systemic framework in which each of the five dimensions and their embedded elements interact dynamically rather than in isolation. Table 3.11 represents five dimensions and 25 elements of validated HBPM.

Table 3.11

Structure of the holistic brand positioning model (created by the author)

| Dimension                   | Included elements                                                                                                              |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| D1: External influences     | Social and cultural factors; economic factors; legal factors; technological factors; environmental factors; political factors. |
| D2: Key elements            | Target audience; company & brand; team; products; competitors.                                                                 |
| D3: Strategic position      | Market position; competition; recognition & relationship; brand identity, vision, mission; brand purpose & product concept.    |
| D4: Positioning performance | Differentiation; brand trust; brand image; brand equity; Value proposition.                                                    |
| D5: Outcomes                | Loyalty; belonging; values; status; price.                                                                                     |

The model captures not only the presence or absence of specific BP attributes but also the interconnected influence among elements. Observations from the empirical data reveal that weaknesses or strengths in one element often ripple across adjacent elements, reflecting underlying coherence or fragmentation in the execution of brand strategy. For example, low clarity in value proposition tends to correspond with weaker brand trust and image, while well-articulated brand identity strengthens loyalty and perceived differentiation. This systemic interaction enables the model to forecast BP dynamics, allowing practitioners to anticipate how strategic improvements, or neglect, may influence the brand’s overall trajectory. Consequently,

HBPM functions not only as a diagnostic and evaluative tool but also as a strategic instrument for planning, aligning, and advancing BP efforts over time.

The finalised HBPM stands as the key research outcome of the Doctoral Thesis, offering both academic contribution and managerial utility by serving as a strategic tool for positioning brands in alignment with organisational values, capabilities, and market expectations.

**Mapping HBPM elements to scholarly sources.** To strengthen the conceptual foundation of the HBPM, the author has developed a structured table that links each of the model’s 25 elements, organised across five dimensions, with corresponding theoretical justifications found in established brand and SM literature (see Table 3.12). The table serves a dual purpose: it provides transparency regarding the model’s conceptual roots and illustrates the academic grounding of each construct included in the model.

All cited authors and theoretical sources are drawn from the Doctoral Thesis theoretical background section (see Chapter 1), ensuring internal consistency between theoretical framing and model development. The justification column lists the central theoretical concept, the BPE, followed by the author(s) and year of publication, providing traceability to specific contributions to BP theory.

The HBPM does not exclude classical BPE; instead, it systematically reframes and integrates them into a multidimensional structure. For instance, Aaker’s (1997) concept of Brand Personality is reflected under the HBPM element “Brand Identity”; Keller’s (2003) Emotional Benefits are captured through the dimensions of “Belonging” and “Values”; Kapferer’s (2012) notion of Self-Image and Reflection is operationalised through the elements “Status” and “Belonging”; and Keller’s (2003) Brand Salience is interpreted as a positioning outcome, central to the aspect “Status” in the HBPM. This alignment demonstrates how HBPM builds on foundational theories while offering a holistic and updated perspective.

i3.12 presents the detailed mapping of HBPM elements to theoretical foundations identified through literature analysis.

Table 3.12

Mapping the holistic brand positioning model elements to scholarly sources (created by the author)

| Dimension               | Element                     | Theoretical Justification                                                        |
|-------------------------|-----------------------------|----------------------------------------------------------------------------------|
| D1: External influences | Social and cultural factors | Cultural/social environment – Marsden, 2002; Kotler, 2016                        |
| D1: External influences | Economic factors            | Economic shifts & globalisation – Porter, 1996; O’Rourke & Williamson, 2000      |
| D1: External influences | Legal factors               | Strategic alignment with legal context – Porter, 1980; Baumgartner & Ebner, 2010 |
| D1: External influences | Technological factors       | Digitalisation & ICT impact – Brenner, 2014; Ritter & Pedersen, 2020             |
| D1: External influences | Environmental factors       | Sustainability dimensions – WCED, 1987; Porter & Kramer, 2011                    |

Table 3.12 (continued)

| Dimension                   | Element                         | Theoretical justification                                                                 |
|-----------------------------|---------------------------------|-------------------------------------------------------------------------------------------|
| D1: External influences     | Political factors               | Political drivers & business strategy – Purvis et al., 2019                               |
| D2: Key elements            | Target audience                 | Brand-consumer fit – Keller, 2003; Aaker, 1996; Marsden, 2002                             |
| D2: Key elements            | Company & brand                 | Brand identity as strategy – Urde, 1999; Kapferer, 2008                                   |
| D2: Key elements            | Team                            | Internal branding and employee alignment – Miles & Mangold, 2005                          |
| D2: Key elements            | Products                        | Innovation through product positioning – Fayvichenko, 2016; Aaker & Shansby, 1982         |
| D2: Key elements            | Competitors                     | Competitor positioning – Ries & Trout, 1981; Aaker, 1996                                  |
| D3: Strategic position      | Market position                 | Market differentiation – Porter, 1996; Keller, 2003                                       |
| D3: Strategic position      | Competition                     | Competitiveness and strategic edge – Porter, 1980; Aaker, 1996; Baumgartner & Ebner, 2010 |
| D3: Strategic position      | Recognition & relationship      | Customer connection & relationship – Keller, 2019; Gyrd-Jones & Kornum, 2013              |
| D3: Strategic position      | Brand identity, vision, mission | Brand essence – Aaker, 1996; Kapferer, 2008                                               |
| D3: Strategic position      | Brand purpose & product concept | Purpose-driven branding – Kotler, 2016; Keller et al., 2002                               |
| D3: Strategic position      | Brand trust                     | Trust as brand equity – Kotler, 2016                                                      |
| D4: Positioning performance | Differentiation                 | Uniqueness & competitive advantage – Aaker, 1996; Kapferer, 2008                          |
| D4: Positioning performance | Brand trust                     | Trust as credibility – Kotler, 2016; Chaudhuri, 2002                                      |
| D4: Positioning performance | Brand image                     | Brand image in consumer memory – Keller, 2003; Aaker, 1996                                |
| D4: Positioning performance | Brand equity                    | Equity as perceived value – Keller, 2001; Feldwick, 1996                                  |
| D4: Positioning performance | Value proposition               | Value in differentiation – Nagle et al., 2011; Marsden, 2002                              |
| D5: Outcomes                | Loyalty                         | Loyalty & repeat purchase – Keller, 2001; Wheeler, 2009                                   |
| D5: Outcomes                | Belonging                       | Belonging & brand relationship – Urde, 1999; Marsden, 2002                                |

Table 3.12 (continued)

| <b>Dimension</b> | <b>Element</b> | <b>Theoretical Justification</b>                                         |
|------------------|----------------|--------------------------------------------------------------------------|
| D5: Outcomes     | Values         | Values-based branding – Schwartz, 1990; Allen, 2002                      |
| D5: Outcomes     | Status         | Status as emotional differentiator – Keller, 2003; Almquist et al., 2016 |
| D5: Outcomes     | Price          | Price perception & value – Riezebos, 2003; Nagle et al., 2011            |

The table supports the validity and generalizability of the HBPM by clarifying the theoretical rationale for including each specific element and highlighting the systemic interdependence of internal and external BP factors. This systematic alignment between theoretical constructs and practical application reinforces the model's credibility, usefulness, and scholarly rigor.

A detailed description of the HBPM elements follows in Table 3.13.

Table 3.13

Element description of the holistic brand positioning model (created by the author)

| <b>Dimension</b>        | <b>Element</b>                   | <b>Element description</b>                                                                                            | <b>Theoretical justification (author, year)</b> |
|-------------------------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| D1: External influences | D1.1 Social and cultural factors | Trends, norms, values, and behaviours in society that influence consumer expectations and brand relevance.            | Kotler & Keller (2016); Kapferer (2012)         |
| D1: External Influences | D1.2 Economic factors            | Market conditions, purchasing power, and economic stability that impact brand affordability and positioning strategy. | Porter (1985); Kotler et al. (2016)             |
| D1: External influences | D1.3 Legal factors               | Regulations and laws influencing marketing practices, product claims, and brand operations.                           | Porter (1985); Kapferer (2012)                  |
| D1: External influences | D1.4 Technological factors       | Emerging technologies and digital innovations that enable new forms of brand communication and customer engagement.   | Keller (2013); Christensen (1997)               |
| D1: External influences | D1.5 Environmental factors       | Ecological and sustainability concerns that shape brand values and strategic commitments.                             | Kotler & Keller (2016); Keller (2003)           |
| D1: External influences | D1.6 Political factors           | Political stability, policy decisions, and public governance affecting brand operation environments.                  | Grant (1991); Keller (2013)                     |



Table 3.13 (continued)

| <b>mension</b>         | <b>Element</b>                       | <b>Element description</b>                                                                                   | <b>Theoretical justification<br/>(author, year)</b>    |
|------------------------|--------------------------------------|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| D2: Key elements       | D2.1 Target audience                 | Clearly defined group of consumers for whom the brand creates specific value, identity, and relevance.       | Kotler & Keller (2016); Kapferer (2012)                |
| D2: Key elements       | D2.2 Company & brand                 | The alignment between the corporate identity and brand identity, representing strategic unity and purpose.   | Hatch & Schultz (2003); Kapferer (2008)                |
| D2: Key elements       | D2.3 Team                            | Internal human resources responsible for delivering brand values and maintaining consistent brand behaviour. | de Chernatony & Harris (2000); Ind (2003)              |
| D2: Key elements       | D2.4 Products                        | Tangible or intangible offerings through which the brand delivers its promise and value proposition.         | Urde (2003); Keller (2013)                             |
| D2: Key Elements       | D2.5 Competitors                     | Other market players that influence a brand's positioning and the need for differentiation.                  | Kotler & Keller (2016); Porter (1985)                  |
| D3: Strategic position | D3.1 Market position                 | The brand's place in the competitive landscape and its perceived value in the minds of consumers.            | Ries & Trout (2001); Kotler & Keller (2016)            |
| D3: Strategic position | D3.2 Competition                     | The intensity and nature of rivalry influencing brand strategies and value communication.                    | Porter (1985); Aaker (1996); Baumgartner & Ebner, 2010 |
| D3: Strategic position | D3.3 Recognition & relationship      | Brand visibility and the emotional or functional bond it forms with customers.                               | Keller (2013); Fournier (1998)                         |
| D3: Strategic position | D3.4 Brand Identity, vision, mission | The core definition and long-term aspirations of the brand, guiding all strategic and communication efforts. | Kapferer (2012); Aaker (1996); de Chernatony (1999)    |
| D3: Strategic position | D3.5 Brand purpose & product concept | The underlying reason for the brand's existence and how it informs product development.                      | Keller (2013); Kotler & Sarkar (2018)                  |

Table 3.13 (continued)

| Dimension                   | Element                | Element description                                                                                   | Theoretical justification (author, year)             |
|-----------------------------|------------------------|-------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| D4: Positioning performance | D4.1 Differentiation   | The distinct attributes that make the brand unique and valuable to its target audience.               | Aaker (1996); Blythe (2005); Kotler & Keller (2016)  |
| D4: Positioning performance | D4.2 Brand trust       | Consumer confidence in the brand's reliability, integrity, and consistency.                           | Aaker (1991); Keller (2013)                          |
| D4: Positioning performance | D4.3 Brand image       | The set of perceptions and associations held by consumers about the brand.                            | Temporal (2002); Keller (2003); Kapferer (2012)      |
| D4: Positioning performance | D4.4 Brand equity      | The cumulative value of the brand based on recognition, loyalty, perceived quality, and associations. | Aaker (1991); Christodoulides & de Chernatony (2010) |
| D4: Positioning performance | D4.5 Value proposition | The unique combination of benefits that the brand promises to deliver to its customers.               | Kapferer (2012); Kotler & Keller (2016)              |
| D5: Outcomes                | D5.1 Loyalty           | The degree of customer commitment and repeated engagement with the brand.                             | Keller (2003); Chaudhuri & Holbrook (2001)           |
| D5: Outcomes                | D5.2 Belonging         | A sense of emotional connection and identification with the brand community.                          | Keller (2003); Kapferer (2012)                       |
| D5: Outcomes                | D5.3 Values            | The principles and ethics communicated by the brand that resonate with consumer beliefs.              | Kapferer (2012); Keller (2013)                       |
| D5: Outcomes                | D5.4 Status            | The symbolic prestige or social value conveyed by the brand to its users.                             | Kapferer (2012); Keller (2003)                       |
| D5: Outcomes                | D5.5 Price             | The perceived financial cost of the brand relative to its value and market positioning.               | Kotler & Keller (2016); Aaker (1996)                 |

### 3.5.2. Practical applicability of the HBPM

The HBPM has been developed as a multidimensional framework that integrates internal and external strategic factors, enabling organisations to position their brands coherently, competitively, and sustainably. Its applicability spans across several domains.

1. **Strategic BD.** HBPM offers a structured approach for defining and refining BP in alignment with an organisation's values, capabilities, and long-term objectives. It supports strategic decision-making at the brand foundation stage and during brand repositioning efforts.

2. **Export and international market entry.** By integrating both internal competencies and external market dynamics, HBPM is particularly suitable for export-oriented companies seeking to build or adapt brands for international audiences. It ensures cultural relevance, strategic coherence, and differentiation in foreign markets.
3. **Brand auditing and diagnostics.** The model serves as a diagnostic tool for evaluating existing BP strategies. By assessing each dimension independently and considering adjacent elements, HBPM helps identify weak or underdeveloped areas in the positioning structure. This makes it highly effective for recognising opportunities for improvement and for systematically strengthening the brand's strategic position.
4. **Innovation alignment and BD.** HBPM supports innovation by aligning new product development with brand identity, stakeholder expectations, and strategic positioning. This ensures that innovations are not isolated technical solutions but are embedded in meaningful and differentiating brand narratives.
5. **Integration into strategic planning.** As demonstrated in the strategic integration phase of the research, HBPM facilitates embedding BP into broader business strategy processes. This integration enhances brand relevance, fosters stakeholder alignment, and provides a long-term competitive advantage.
6. **Academic and educational use.** The model contributes to branding theory by offering a systematised, empirically validated, and conceptually grounded approach to BP. It can be used in academic contexts for teaching, further research, or as a benchmark for developing new conceptual models.

### 3.5.3. Unique contributions of the HBPM

The HBPM represents a novel conceptual and empirically grounded framework that advances the field of strategic brand management by addressing critical gaps in BP theory and practice. Its uniqueness lies in the following key dimensions.

1. **Integrative structure of internal and external dimensions.** HBPM bridges the traditionally separated perspectives of internal capabilities and external market dynamics. The model captures both sets of influences within a unified framework, reflecting the interdependence of organisational resources, stakeholder expectations, and competitive positioning. This integration demonstrates a holistic approach, aligning strategic intent with market reality and stakeholder expectations (Urde, 2003; Kotler et al., 2016).
2. **Strategic orientation of BP.** By embedding BP within the broader context of SM, HBPM transcends marketing-centric models. It incorporates strategic goals and business outcomes, reinforcing the relevance of BP as a driver of long-term OP and OS. A dedicated analysis of the integration of BP into strategic planning processes empirically supports this alignment (see Section 3.4.2). Brand orientation means that the formulation of the company's strategy is based on brands, focusing the company's commitment and resources on building, developing, and nurturing them. This approach achieves a platform for a sustainable competitive strategy (Urde, 1994).
3. **Systemic thinking and relational logic.** The model embraces systems thinking, emphasizing not only the evaluation of discrete brand elements but also the understanding of

their interrelations and causal effects on BD. This structure facilitates a deeper understanding of brand performance, promoting strategic coherence and identifying key leverage points for brand growth.

**4. Empirically validated multidimensional framework.** Developed through a multi-phase research process, HBPM has been tested using qualitative and quantitative methods, including content analysis, expert validation, and survey-based hypothesis testing. Each of the five strategic dimensions has been conceptually refined and empirically validated, ensuring its construct validity and academic reliability (Miles et al., 2014; Yin, 2017).

**5. Practical usability and diagnostic functionality.** Designed not only as a theoretical model but also as a helpful tool, HBPM enables organisations to assess BP comprehensively, identify strengths and inconsistencies, and develop targeted strategic actions. It supports brand auditing, scenario planning, and positioning enhancement across market conditions. The model was practically validated in the real-world case of the *Joy for Tails* BD.

**6. Sustainability perspective and long-term value alignment.** A distinguishing element of the HBPM is its inclusion of a sustainability component, acknowledging the role of BP in shaping long-term business resilience and stakeholder trust. This aligns with contemporary management thinking, which links strategic branding to OS (Kapferer, 2012; Kotler et al., 2016).

**7. Adaptability across contexts.** The flexible structure of the HBPM allows it to be adapted to various industries, company sizes, and strategic maturity levels. The model's modular nature supports the development of context-specific tools or metrics derived from the core dimensions, making it applicable in diverse organisational settings. This was confirmed empirically through the model's application across nine industries.

**8. Theoretical depth and research suitability.** HBPM builds on established conceptual foundations while offering a refined theoretical structure that can be empirically tested. Its development follows recognised model-building guidelines (MacInnis, 2011; Jaakkola, 2020), making it particularly suitable for scholarly research, Doctoral Theses, and academic publications.

HBPM makes a substantial theoretical and practical contribution by addressing long-standing fragmentation in BP frameworks, integrating strategy, systems thinking, and empirical grounding into a versatile model applicable across contexts and research designs.

### **3.6. Hypothesis validation: Integrating brand positioning into strategy**

This chapter validates the hypotheses presented in Section 2.5 concerning the relationship between BP, SM, OP, and OS. A triangulated methodology was employed, combining focus group discussions (N = 16), expert interviews (N = 13), and a structured executive survey (N = 14). In focus groups, questions were structured around the HBPM dimensions and the strategic integration of BP, similar to the interview guide (see Appendix 5). This ensured methodological consistency across both qualitative methods, allowing for a coherent comparison with survey results.

The focus group sessions included a dedicated thematic section titled “Strategic Integration of BP – Additional Questions for Hypothesis Validation” (see Appendix 5, Section G). Similarly, the expert interviews included a structured question set “Questions for Strategic Integration of BP for hypothesis validation” (see Appendix 7, Questions 27–31). Findings from both qualitative sources confirmed the critical role of BP in SM: 14 out of 16 focus group participants and all 13 interviewees emphasised its importance, frequently stating that without BP, there is no meaningful strategy.

**Survey design within the triangulated approach.** Within the triangulated research design, hypotheses were validated across all three data sources: focus groups, expert interviews, and the executive survey. In addition to the survey, both qualitative methods included dedicated questions on the integration of BP into SM, OP, and OS (see Appendices 5 and 7). This ensured that the qualitative and quantitative strands addressed the same conceptual focus, thereby strengthening analytical consistency.

The survey was designed to assess the direct and indirect effects of BP on OP and OS (see Appendix 16 for survey questions and results). It was administered to 14 company owners and top executives; the demographic profile of respondents included nine females and five males, with an average age of 44 years (see ethical considerations in Section 3.2). Among them, nine were company owners and five were top-level managers, representing various sectors, including manufacturing, marketing, finance, and services. The majority of respondents were based in the capital city of Latvia (9), while five were from outside the capital (for survey respondents’ profile data see Table 3.14).

Table 3.14  
 Characteristics of survey respondents (author’s compilation)

| Respondent No. | Industry      | Company size | Position  | Experience | Export |
|----------------|---------------|--------------|-----------|------------|--------|
| 1              | Manufacturing | SME          | Owner     | 18         | yes    |
| 2              | Marketing     | SME          | Executive | 7          | yes    |
| 3              | Manufacturing | Large        | Executive | 9          | yes    |
| 4              | Technology    | Startup      | Owner     | 16         | no     |
| 5              | Finances      | SME          | Owner     | 8          | yes    |
| 6              | Manufacturing | Large        | Owner     | 10         | no     |
| 7              | Accounting    | SME          | Owner     | 9          | no     |
| 8              | Education     | Large        | Owner     | 12         | yes    |
| 9              | Manufacturing | SME          | Executive | 18         | yes    |
| 10             | Agriculture   | SME          | Executive | 8          | no     |
| 11             | Beauty care   | SME          | Owner     | 15         | yes    |
| 12             | Education     | SME          | Owner     | 12         | no     |
| 13             | Construction  | Large        | Owner     | 7          | yes    |
| 14             | Trade         | SME          | Executive | 12         | yes    |

The study employed a purposive sampling strategy, a common approach in qualitative and exploratory research involving managerial respondents (Bryman, 2016). Each respondent

evaluated the influence of BP and its integration into SM on strategic and operational outcomes using a five-point Likert scale, which is a widely accepted method for measuring managerial perceptions (DeVellis, 2017; Likert, 1932).

The survey examined four key areas: 1) the independent impact of BP, 2) the added value of BP when integrated into SM, 3) the mediating role of SM, and 4) the effects of management involvement. Descriptive results indicated generally high ratings across all items, with mean values ranging from 3.57 (Q1 – clarity of BP) to 4.86 (Q5 – the role of BP in supporting SM). A composite Total score was calculated as the mean across all nine items (Q1–Q9), averaging 4.32 (SD = 0.72), which confirms that respondents overall perceived BP as a strategically significant factor in organisational development.

Pearson correlation analysis was then applied to test the hypothesised relationships. Before analysis, survey data were normalised to a five-point Likert scale, and binary responses were coded to ensure comparability across items.

**Survey results.** The survey findings indicate that BP has a strong perceived effect on organisational outcomes. When assessed independently, the impact of BP on OP and OS was rated between “moderately strong” and “strong.” However, when BP was evaluated as integrated into SM, ratings were consistently higher, with the majority of respondents assessing the influence as “almost strong” or “strong.” Specifically, 71 % of respondents agreed that BP or its elements should be incorporated into SM practices.

In addition, 86 % of surveyed executives reported that their organisations develop and maintain BP or its elements, with 43 % perceiving BP as a holistic construct and another 43 % focusing on individual elements (e.g., market and competitor research, value determination, uniqueness and differentiation). Only 14 % considered BP to be of low importance. The author makes a comparison to reflect changes in relationship effects (see Fig. 3.12).

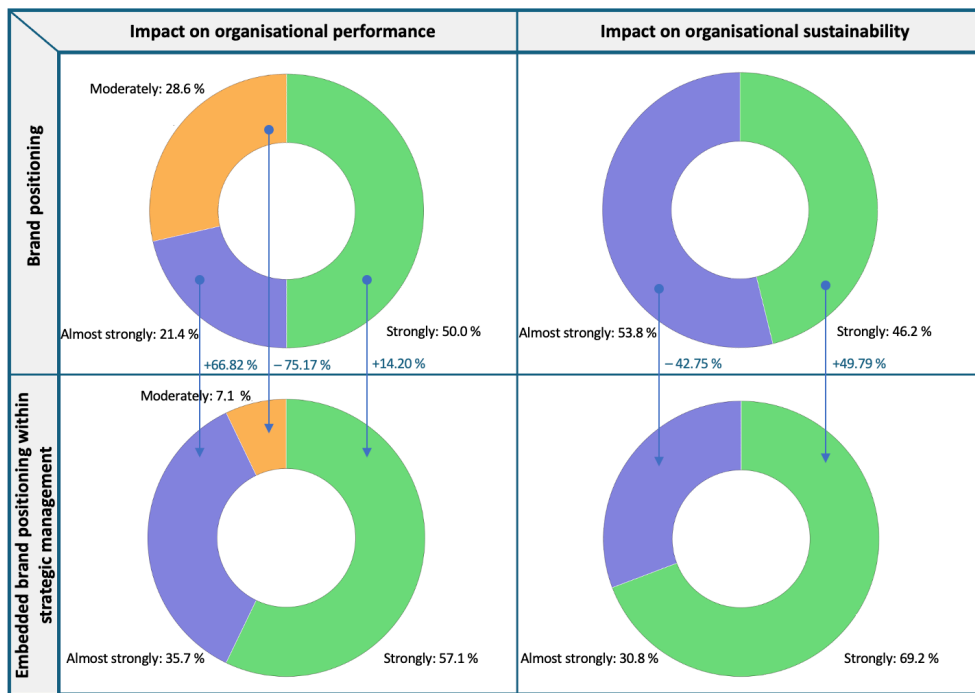


Fig. 3.12. A comparison of the impact of brand positioning on outcomes with brand positioning embedded in strategic management (author's developed visualisation).

The results confirm that top executives believe BP, when embedded within SM, has a substantial impact on organisations' performance and sustainability. When comparing the effects of BP on company results with positioning integrated into SM, a significant increase in rating is observed.

Specifically, it is associated with a +66.82 % rating increase for an "almost strong" impact (35.7 %) and a +14.20% rating increase for a "strong" impact (57.1 %). Additionally, a higher rating tendency is observed for the component of sustainability, with +49.79 % of respondents rating its impact as "strong" (69.2 %).

The survey also confirms the role of management involvement as a mediating factor: 64 % of management representatives affirm substantial impact, and 29 % rate it as "almost strong." Overall, the results demonstrate consistently high ratings across all dimensions.

- BP's contribution to company performance and sustainability was evaluated as "strong" (average score  $\approx 4.5$ ).
- Its role in supporting strategic development received particularly high recognition, with most respondents indicating a powerful impact (average score  $\approx 4.6$ ).
- The integration of BP into SM processes was also considered highly effective in enhancing both short-term and long-term outcomes (average score  $\approx 4.6$ ).

These findings underscore the perceived strategic importance of BP. They align with qualitative insights obtained through interviews and focus groups, where 86 % of all interviewees confirmed that "there is no meaningful strategy without positioning." The results validate the research hypothesis that BP, when embedded within SM, significantly enhances OP and OS.

**Data preparation and correlation analysis.** Survey responses were normalised to ensure comparability across different scales (3-point and 10-point). This data transformation enabled subsequent statistical analysis, including the calculation of descriptive statistics and the development of correlation heatmaps.

Likert-scale questions were harmonised into a uniform numerical scale (1–5), while dichotomous questions (yes/no) were coded as binary variables. Open-ended answers (concerning essential elements of BP) were grouped into categories, enabling frequency analysis and integration with quantitative indicators. As the survey items were originally formulated on different response formats (binary, three-point, and five-point scales), all responses were normalised to a five-point Likert scale (1-5) to ensure analytical consistency (see Table 3.15).

Table 3.15

Normalised survey result data (created by the author)

| Respondent No. | Q1 | Q2 | Q3 | Q4 | Q5 | Q6 | Q7 | Q8 | Q9 |
|----------------|----|----|----|----|----|----|----|----|----|
| 1              | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  |
| 2              | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 4  |
| 3              | 3  | 5  | 5  | 3  | 5  | 4  | 4  | 5  | 4  |
| 4              | 3  | 4  | 5  | 4  | 5  | 5  | 5  | 5  | 5  |
| 5              | 1  | 3  | 4  | 4  | 5  | 4  | 4  | 3  | 5  |
| 6              | 5  | 5  | 5  | 4  | 5  | 4  | 5  | 5  | 5  |
| 7              | 1  | 3  | 3  | 3  | 3  | 0  | 0  | 3  | 3  |
| 8              | 3  | 5  | 4  | 5  | 5  | 4  | 5  | 3  | 5  |
| 9              | 3  | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  |
| 10             | 3  | 4  | 4  | 5  | 5  | 5  | 5  | 5  | 5  |
| 11             | 5  | 4  | 4  | 4  | 5  | 4  | 4  | 5  | 4  |
| 12             | 5  | 3  | 4  | 3  | 5  | 4  | 4  | 3  | 4  |
| 13             | 3  | 3  | 5  | 4  | 5  | 4  | 5  | 5  | 5  |
| 14             | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  | 5  |

Two responses with zero values (Q6 and Q7) were excluded from the dataset, as they did not represent valid input for the applied scales. Their removal ensured the correctness of subsequent calculations of mean values and correlation coefficients. This harmonisation enabled comparability across items, facilitated the calculation of descriptive statistics, and allowed for the application of Pearson correlation analysis for hypothesis validation.

**A correlation map (heatmap).** The use of a heatmap is particularly significant, as it provides a visual representation of the correlations between BP dimensions (see Fig. 3.13). This approach enables not only numerical analysis but also intuitive interpretation of the strength and direction of associations. Pearson correlation analysis is appropriate in this context because the research aim is to identify systematic relationships consistent with the proposed hypotheses, rather than to establish strict causal effects. While correlation does not imply causation, especially given the small sample size, the heatmap highlights consistent patterns that align with theoretical expectations, thereby strengthening the empirical validation of the model. In this framework, a



stronger correlation (higher coefficient value) indicates a closer association between the examined constructs, meaning that when one-dimension increases (e.g., stronger BP or deeper integration into SM), it is systematically accompanied by higher levels of OP and OS.

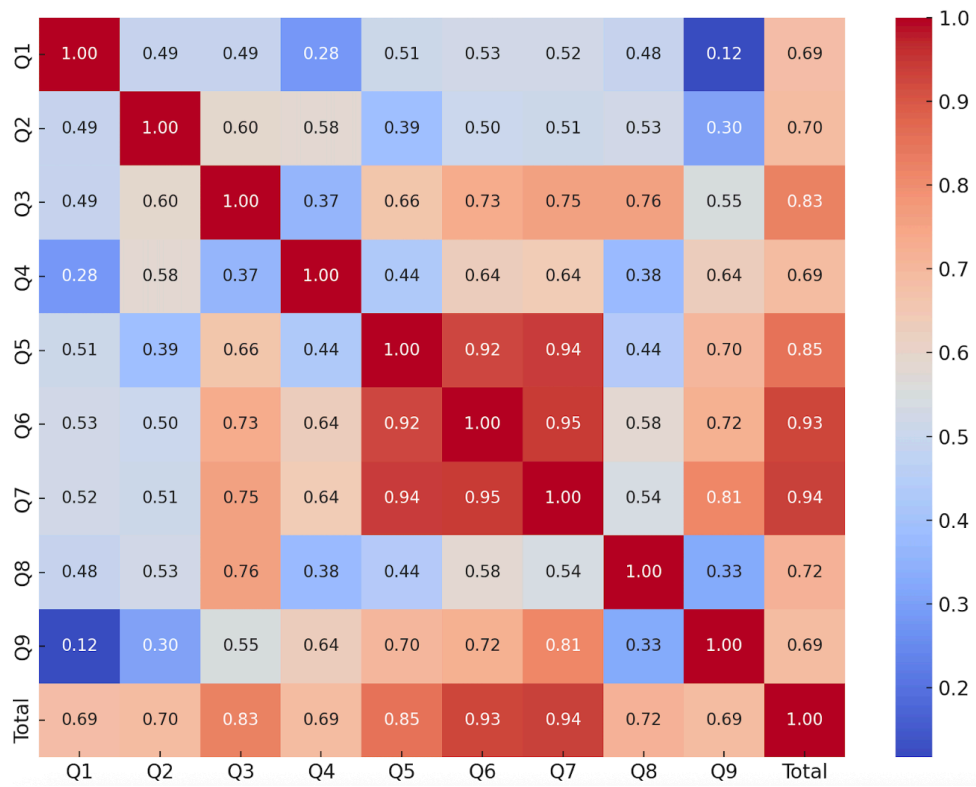


Fig. 3.13. Pearson correlation heatmap of survey questions (author’s developed visualisation).

The heatmap displays Pearson correlation coefficients (r) between survey items (Q1–Q9). Colours encode the value of r on a continuous scale from –1 to +1: red shades indicate positive relationships, blue shades negative ones. Darker hues correspond to stronger correlations ( $|r|$  closer to 1), while lighter hues reflect weaker associations ( $|r|$  closer to 0). The main diagonal equals 1.00 (self-correlation). To read a specific correlation, locate the intersection of the corresponding row and column (e.g., Q6–Q7); the numeric label in the cell shows the exact r value. The matrix is symmetric (Q6–Q7 = Q7–Q6). If a “Total” row/column is shown, it represents the composite score and its correlation with each item. Interpretation: ~0.00–0.19 very weak; 0.20–0.39 weak; 0.40–0.59 moderate; 0.60–0.79 strong; 0.80–1.00 very strong.

**Hypothesis validation (survey).** The results of the heatmap analysis confirm the hypotheses.

- H1. Higher OP is associated with higher levels of OS.**  
 The survey also confirms the role of management involvement as a mediating factor: Q6 ( $SM \rightarrow OP$ ) and Q7 ( $SM \rightarrow OS$ ) show a very strong positive correlation ( $r = 0.95$ ), indicating that higher performance levels are consistently associated with higher sustainability outcomes.

- **H2a. Strong BP is associated with higher levels of OP.**

Supported by the data: BP-related items (Q2–Q4) correlate positively with OP (Q6) in the range of  $r = 0.58–0.73$ . This suggests that stronger BP perceptions are systematically linked to higher OP.

- **H2b. Strong BP is associated with higher levels of OS.**

Confirmed by the correlation between BP items (Q2–Q4) and OS (Q7), ranging from  $r = 0.60$  to  $r = 0.75$ . These results demonstrate that BP contributes not only to performance but also to long-term sustainability.

- **H3a. The effect of BP on OP depends on BP integration into SM.**

Supported by very strong correlations: Q5 (BP supports SM) with Q6 ( $SM \rightarrow OP$ ) shows  $r = 0.92$ , and Q4 ( $BP \rightarrow SM$ ) with Q6 shows  $r = 0.64$ . This confirms that BP has a stronger impact on performance when embedded into SM processes.

- **H3b. The effect of BP on OS depends on BP integration into SM.**

Also confirmed: Q5 ( $BP$  supports  $SM$ ) with Q7 ( $SM \rightarrow OS$ ) shows  $r = 0.94$ , and Q4 ( $BP \rightarrow SM$ ) with Q7 shows  $r = 0.64$ . These results indicate that BP has the greatest effect on sustainability when strategically integrated.

Finally, the *Total* score correlates strongly with all individual items ( $r = 0.66–0.94$ ), with the highest associations observed with Q3, Q5, Q6, and Q7. This demonstrates that the overall construct of BP, performance, sustainability, and strategic integration functions as a coherent system, supporting the conceptual framework of this Doctoral Thesis. The results of the study are further illustrated in the model (see Fig. 3.15), which visualises the conceptual structure and empirically established relationships.

**Control variables (exploratory robustness check).** Given the small sample size ( $N = 14$ ), the inclusion of control variables was treated as an exploratory robustness check rather than a full statistical adjustment. Control factors, including ownership versus executive role, firm size, gender, age, and location, were reviewed. The analysis suggested that micro-firm and owner-executive cases tend to assign higher importance to SM integration (Q5), while reporting slightly lower direct effects of BP on performance and sustainability (Q2–Q4). However, these differences did not alter the overall pattern of correlations between BP, SM, OP, and OS, which remained consistent across the sample. Therefore, control variables were not included in the conceptual model but were acknowledged in the empirical analysis to confirm the stability of the results.

**Qualitative insights.** In addition to the survey, both focus groups and interviews included a dedicated thematic section on the strategic integration of BP. Participants were asked to evaluate the impact of BP on OP, to reflect on whether effective BP can enhance OS, to assess the inclusion of BP in SM processes, and to identify the advantages and risks of such integration. The findings from focus groups and interviews reinforce the survey results. Participants consistently recognised BP as an essential driver of OP, highlighting that a precise and differentiated positioning contributes to financial outcomes, competitive advantage, and stronger customer relationships. Many participants also agreed that effective BP enhances long-term OS by strengthening stakeholder trust and strategic adaptability. At the same time,

discussions revealed that the value of BP is maximised when it is embedded into SM, where it guides decision-making and resource allocation. Several participants highlighted potential risks, such as the danger of treating BP as a purely marketing function rather than a strategic mechanism, or the difficulty of sustaining a consistent positioning across industries with rapid change. Furthermore, both focus group and interview participants acknowledged that company size and industry context can influence the strength of BP’s impact: micro-firms and owner-executives tend to perceive the role of strategic integration differently compared to larger firms with more formalised management structures.

Illustrative quotes were included from participants. For example, one executive noted, “Without positioning, there is no strategy” (Interviewee 7, manufacturing), while another emphasised, ‘In small firms, BP is more intuitive, but integration into SM makes it sustainable” (Focus group participant, services). These reflections were further visualised through thematic coding maps, which highlight the most frequently recurring themes across the interviews and focus groups. Fig. 3.14 presents a visualisation developed from the focus group and interview data – illustrating the main themes identified in relation to the strategic integration of BP.



Fig. 3.14. Strategic integration of brand positioning: key themes from focus groups and interviews (author’s developed model).

At the centre of the map is the overarching theme “Strategic integration of BP,” which reflects the unifying role of positioning in organisational strategy. Surrounding this core are five interrelated dimensions that emerged most consistently across the qualitative data. These include: 1) BP as a strategic resource, emphasising that positioning is considered a fundamental component of corporate strategy rather than a communication tool; 2) the impact of BP on OP,

where differentiation, competitive advantage, and financial results were directly linked to effective positioning; 3) the impact of BP on OS, highlighting its role in stakeholder trust, resilience, and long-term growth; 4) the mediating role of SM, showing that BP achieves its strongest effects when embedded in formal strategic processes; and 5) risks and contextual factors, including the tendency to reduce BP to a marketing-only activity, the challenge of sustaining positioning in dynamic industries, and variations in perception between micro-firms, owner–executives, and larger organisations. Together, these themes provide qualitative confirmation of the hypothesised relationships (H1–H3b) and contextualise the survey results, demonstrating that the perceived impact of BP is maximized when it is strategically integrated. These qualitative insights validate and contextualise the survey findings, providing richer evidence for the hypotheses tested.

**Validated model.** The author develops the validated model, an empirical confirmation of the hypothesized relationships between BP, SM, OP, and OS, using structural equation modelling (SEM). The model integrates the survey results and qualitative insights, demonstrating the strength of the proposed relationships and their practical implications (see Fig. 3.15).

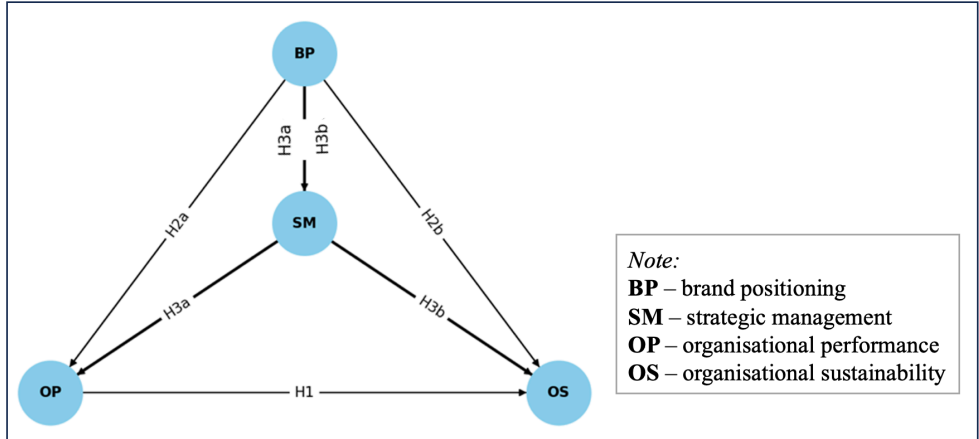


Fig. 3.15. Validated model: interaction between brand positioning, strategic management, organisational performance, and organisational sustainability (author’s developed model, scientific novelty).

The validated model confirms that top executives believe BP affects an organisation’s performance and sustainability, and that its impact is more pronounced and effective when BP is integrated into SM processes.

**Summary and conclusion of hypothesis validation.** All proposed hypotheses were empirically confirmed. The findings from the triangulated research – encompassing focus group discussions, expert interviews, and a targeted executive survey – provide strong empirical support for the proposed hypotheses on the strategic integration of BP. The data confirm that BP significantly influences both OP and OS, and that this impact is amplified when BP is embedded within the broader SM framework. First, the results emphasise that executive-level involvement plays a critical mediating role in strengthening the relationship between strategic

BP and business outcomes. The more engaged the leadership is in defining and steering BP-related initiatives, the stronger the observed impact on both performance metrics and long-term organisational resilience.

Second, industry context and managerial attitudes shape how BP is perceived and operationalised. While most participants recognise BP as a valuable strategic construct, the degree of integration and perceived relevance varies across sectors and firm types. These contextual differences, identified as exploratory control variables, warrant further investigation to better understand their moderating effects.

Third, BP directly contributes to enhanced brand recognition and customer decision-making, particularly through the development of a coherent brand identity and image. These elements were consistently linked to stronger customer preference and loyalty. However, 43 % of surveyed executives conceptualise BP as a set of separate elements rather than a holistic process, which may lead to fragmented implementation and diminished strategic value. This finding underscores the need for further alignment and education on BP as a systemic construct.

In conclusion, the validation process affirms all the proposed hypotheses.

- **H1:** OP and OS are interrelated, with higher OP associated with higher OS.
- **H2a/b:** Strong BP influences both OP and OS.
- **H3a/b:** SM strengthens the effect of BP on both OP and OS.

The research confirms that experts widely regard BP as a vital component of SM. When formalised within strategic processes, BP acts as a powerful lever for achieving sustained organisational success. Consequently, organisations should move beyond isolated branding activities and adopt strategically integrated BP to fully leverage its potential in shaping performance, sustainability, and competitive differentiation.

**BP as a resource-based strategic process.** These findings also resonate with the logic of the RBV of strategy (Grant, 1991) – see Fig. 1.6, which emphasises an “inside-out” approach: starting from internal resources and capabilities, appraising their potential for sustainable competitive advantage, and developing strategies that best exploit these strengths. By analogy, HBPM operationalises this resource-based logic for BP. Its internal dimensions (D2–D4) focus on organisational identity, differentiation capabilities, and positioning performance, thereby linking brand resources and capabilities to sustainable outcomes. HBPM can therefore be interpreted not only as a positioning evaluation framework but also as a diagnostic instrument in resource-based strategic planning.

The empirical analysis confirmed the hypothesised relationships between BP, SM, OP, and OS. These findings provide strong support for the HBPM, developed in this Doctoral Thesis as a comprehensive framework that links positioning with performance, sustainability, and strategic integration. The empirical validation demonstrates the model’s relevance to contemporary strategic marketing, where positioning must be treated as a systemic and multidimensional construct.

## CONCLUSIONS AND RECOMMENDATIONS

This final chapter consolidates the main theoretical, empirical, and practical insights of the Doctoral Thesis and presents recommendations for different stakeholder groups. The research was designed to investigate BP as a strategic approach to sustainable business development, culminating in the development and empirical validation of the HBPM. The objectives formulated in the introduction guided the entire process – from theoretical synthesis and the construction of conceptual models, through empirical validation using expert focus groups and interviews, to practical case application.

Accordingly, the conclusions presented here reflect both the theoretical contributions of the Doctoral Thesis and the empirical findings that validate them. They highlight the scientific novelty of the research, demonstrate how the HBPM addresses long-standing fragmentation in BP theory, and illustrate its practical value in guiding organisations towards sustainable growth. Each conclusion is followed by targeted recommendations, designed for academic researchers, higher education institutions, business leaders, strategists, consultants, entrepreneurs, and policymakers. This ensures that the Doctoral Thesis results are not only conceptually robust but also actionable and relevant across multiple contexts.

**Conclusions.** The conclusions of this Doctoral Thesis are derived from the synthesis of theoretical analysis, empirical validation, and practical application. They reflect the extent to which the research objectives were achieved and demonstrate how the findings contribute to both academic knowledge and managerial practice.

- **The research aim** – *to investigate BP as a strategic approach to sustainable business development by developing and empirically validating a holistic approach that links BP with OP, SM, and sustainability* – **has been achieved.** This has been realised through the creation of the validated HBPM, which provides a scientifically grounded framework that integrates positioning into SM, empirically confirms its influence on performance and sustainability, and establishes it as a strategic governance mechanism for long-term business development.
- **Answering the research question:** *How, in the context of sustainable business development, does BP contribute to OP and OS, and how does this impact depend on its integration into SM?* – **the Doctoral Thesis confirms** that BP influences both OP and OS, and that its effect is significantly amplified when integrated into SM, as demonstrated by the empirically confirmed interaction model.
- **The research confirms all proposed hypotheses (H1–H3b).** The empirical findings demonstrate that OP and OS are interrelated, that BP positively affects both outcomes, and that these effects are significantly strengthened when BP is integrated into SM.

The result of the Doctoral Thesis lies in its unique combination of theoretical synthesis, empirical validation (triangulated research across focus groups, interviews, and survey), and practical application (the *Joy for Tails* case). This contribution addresses long-standing fragmentation in positioning research and establishes a comprehensive, empirically tested framework that connects positioning with OP and OS. This Doctoral Thesis provides a novel

contribution to the marketing and management field by investigating BP as a strategic approach to sustainable business development.

To ensure clarity and systematic presentation, the conclusions are structured in accordance with the research objectives outlined in the introduction. This structure highlights the theoretical advancements, empirical confirmations, and practical implications of the study, while also underlining the novelty and unique contribution of the author's work.

**Objective 1: To analyse the theoretical foundations and conceptual development of BP in the context of sustainable business development.** The analysis of academic literature revealed that BP theory remains fragmented. Most approaches focus either on communication strategies, consumer perception, or brand identity, without providing an integrated framework that links internal brand logic, external environmental influences, strategic positioning, and outcome-oriented measures. This fragmentation has created both conceptual ambiguities and practical inconsistencies.

The novelty of this contribution lies in the historical-conceptual synthesis of positioning logic, which systematically traced the evolution of BP through entrepreneurial and strategic development. This synthesis was based on a structured qualitative content analysis of 31 definitions and 56 theoretical sources, providing a new consolidated overview of how the construct has been defined and applied across academic literature.

**Objective 2: To identify and synthesise key positioning elements, models, and strategic approaches through qualitative content analysis.**

Through a systematic qualitative content analysis of 31 definitions and 56 theoretical sources, 25 elements across five dimensions of BP were identified. Positioning models were further classified into three groups: holistic, process-based, and component-based. This synthesis brought clarity to the theoretical landscape and revealed the essential building blocks that influence the effectiveness of BP.

The main conclusion is that BP requires the alignment of identity, mission, and vision with product and value propositions, customer relevance, and stakeholder trust, rather than being reduced to one-dimensional constructs. Internal coherence provides the foundation for differentiation and strategic clarity, while external influences – including technological, socio-cultural, political, and market dynamics – act as contextual drivers that organisations cannot ignore.

**Objective 3: To develop a TBPCM based on the extracted positioning logic and structural elements.** The development of the TBPCM consolidated fragmented theoretical insights into a single coherent framework. It provided a structured logic of how positioning elements interrelate, which later served as the foundation for the HBPM. The novelty lies in the creation of a theory-driven conceptual model for validation (TBPCM) that integrates strategic, symbolic, and stakeholder-oriented elements within a coherent framework.

**Objective 4: To investigate the interaction between BP, customer decision-making, stakeholder engagement, and brand loyalty formation.** The empirical investigation demonstrated strong relationships between internal brand architecture and positioning

outcomes. Identity, mission, and vision were found to influence brand trust, differentiation, and equity directly. Similarly, the link between target audience clarity and loyalty was confirmed. The research also highlighted the crucial role of management involvement: when senior executives actively engage in defining and steering BP, outcomes are more authentic, consistent, and strategically aligned. The innovative contribution of this stage is the conceptual model of brand-customer interaction and loyalty formation.

**Objective 5: To construct hypotheses linking BP with OP and OS, including the mediating role of SM.** The study confirmed the proposed hypotheses, demonstrating that BP has a positive influence on both OP and OS, and that these effects are significantly strengthened when integrated into SM. This was empirically demonstrated by the validated model of interaction between BP, SM, OP, and OS, extending existing theories of strategic brand management to a system-level perspective.

**Objective 6: To validate the proposed model through focus groups and expert interviews and refine it into the new holistic model.** The empirical validation confirmed the internal coherence and external applicability of the HBPM, demonstrating its value as both a conceptual framework and a managerial tool. Beyond establishing the overall structure, the HBPM proved capable of mapping interactions between elements and dimensions, showing how specific strengths or weaknesses in one area affect outcomes in others. The novelty lies in the triangulated validation design, combining focus groups and expert interviews to refine the HBPM into a robust diagnostic tool.

The HBPM provides a validated, multidimensional framework that can be applied across academic, business, and policy contexts. It enables the systematic diagnosis of positioning maturity, facilitates alignment with SM, and serves as a practical tool for achieving long-term sustainable growth.

Although validated primarily in the Latvian and Baltic context, the HBPM demonstrated international applicability through export-oriented case analysis, positioning it as a versatile and adaptable tool for both domestic and global brand management.

**Objective 7: To demonstrate the model's applicability through case-based testing and assess its relevance for strategic decision-making in sustainable brand management.** The application of the HBPM in the development of the *Joy for Tails* brand demonstrated its practical value. It showed that the model can guide new brand creation, support export readiness, and align organisational capabilities with market demands. The HBPM is therefore not only theoretically and empirically validated but also practically applicable across industries, particularly for companies aiming to internationalise their operations.

This Doctoral Thesis contributes a validated holistic model for integrating BP into strategic management. The methodological uniqueness of this research lies in its triangulated, multi-layered design, which unifies theoretical synthesis, qualitative insight, and quantitative validation into a single coherent model-building process, transforming fragmented positioning theory into a robust strategic framework applicable across industries and contexts.



**Recommendations.** The findings of this Thesis highlight the necessity of approaching BP holistically. In contemporary business management and marketing, positioning cannot be reduced to communication or promotional activities; instead, it must be embedded in SM as a multidimensional construct that integrates both internal and external factors. A sustainable brand strategy requires alignment of organisational identity, mission, and culture with stakeholder expectations and market dynamics, ensuring coherence and adaptability over time. The empirical validation of the HBPM confirms that positioning functions as a strategic mechanism and governance tool, whose impact is amplified when integrated into organisational strategy. Accordingly, the recommendations presented here translate the theoretical and empirical contributions of this Thesis into practical guidance for academic researchers, business leaders, entrepreneurs, consultants, and policymakers. They are structured according to key stakeholder groups, ensuring that the implications of the HBPM are actionable across academic, managerial, entrepreneurial, and policy contexts.

#### **For academic researchers and higher education institutions**

- Integrate the holistic approach to BP into research and curricula, recognising BP not as a narrow marketing instrument but as a strategic mechanism and approach for sustainable business development.
- Apply the HBPM for comparative studies, longitudinal research, and teaching, particularly in the fields of strategic marketing, brand management, and sustainability.
- Use the classification of positioning models (holistic, process-based, component-based) developed in this Doctoral Thesis as a conceptual foundation to structure future research and reduce fragmentation in the field.

#### **For business leaders, strategists, and consultants**

- Embed BP as a core element of SM, aligning positioning decisions with long-term competitiveness objectives, resource allocation, and sustainable business growth.
- Apply the HBPM as a diagnostic tool to assess current positioning maturity, identify misalignments between internal and external brand dimensions, and prioritise strategic interventions.
- Foster top management involvement in positioning decisions, as leadership engagement is critical for authenticity, coherence, and resilience.
- Incorporate both internal and external dimensions into positioning decisions, systematically considering technological change, socio-cultural dynamics, political factors, and market competition.

#### **For entrepreneurs and export-oriented firms**

- Adopt the HBPM as a practical framework for new brand creation, internationalisation, and market entry strategies.
- Ensure that brand identity, stakeholder expectations, and international market requirements are aligned to enhance export readiness and competitiveness.
- Leverage BP as a long-term strategic asset that supports growth, differentiation, and stakeholder trust, particularly in new or competitive markets.

**For policymakers and industry associations**

- Recognise BP as a strategic construct in competitiveness and sustainability frameworks, moving beyond the traditional view of branding as purely promotional, and supporting its integration into training and business development programmes.
- Utilise the HBPM as a reference framework in designing sectoral or regional development strategies, ensuring that positioning logic contributes to competitiveness and innovation capacity.

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## APPENDICES

## Qualitative content analysis of elements of brand positioning definitions (N = 31)

| No. | Author<br>(year)       | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Elements of BP definitions |                                                  |                                 |                                                                                       |                      |                   |
|-----|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|--------------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------|----------------------|-------------------|
|     |                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Mind of<br>consumer        | Differentiation/<br>Competition/<br>Unique offer | Values/<br>Needs/<br>Connection | Brand<br>identity/<br>Self-concept/<br>Self-image/<br>Self-<br>expressive<br>benefits | Segment<br>placement | Image/<br>Symbols |
| 1   | Levy (1959)            | By stressing the attributes of their products, marketers can move beyond the utilitarian values of the product and address consumer needs using behavioural concepts such as imagery, symbolic value and self-concept to create a desired representation of a service or product in the mind of the consumer.                                                                                                                                               | 1                          |                                                  | 1                               | 1                                                                                     |                      | 1                 |
| 2   | Ries and Trout (1981)  | Positioning is a marketing method for creating the perception of product, brand or identity. Positioning is where your product's image is placed in relation to image of your competitor's products. Brand positioning is the sum of all activities that position the brand in the mind of the customer relative to its competition. Positioning is not about creating something new or different, but to manipulate the mind set and existing connections. | 1                          | 1                                                | 1                               |                                                                                       |                      | 1                 |
| 3   | Day (1981)             | Product positioning refers to the customer's perceptions of the place a product or brand occupies in a given market.                                                                                                                                                                                                                                                                                                                                        | 1                          |                                                  |                                 |                                                                                       | 1                    |                   |
| 4   | Lodish (1986)          | The process of trying to improve the perception of your product by a market segment.                                                                                                                                                                                                                                                                                                                                                                        | 1                          |                                                  |                                 |                                                                                       | 1                    |                   |
| 5   | Quelch (1991)          | Positioning is a management concept of where a product or service should stand in the marketplace relative to competitive products and services.                                                                                                                                                                                                                                                                                                            |                            | 1                                                |                                 |                                                                                       | 1                    |                   |
| 6   | Kapferer (1992)        | Positioning is a process of emphasizing the brand's distinctive and motivating attributes in the light of competition. Positioning needs to result from brand identity. Only well-defined brand identity allows to precisely define brand positioning.                                                                                                                                                                                                      |                            | 1                                                |                                 | 1                                                                                     |                      |                   |
| 7   | Dibb and Simkin (1993) | Positioning is the place which a product occupies in a given market as perceived by the product's targeted consumers.                                                                                                                                                                                                                                                                                                                                       | 1                          |                                                  |                                 |                                                                                       |                      |                   |
| 8   | Myers (1996)           | It [positioning] is what happens in a customer's mind, how customers view competing product entries                                                                                                                                                                                                                                                                                                                                                         | 1                          | 1                                                |                                 |                                                                                       |                      |                   |

|    |                                |                                                                                                                                                                                                                                                                                                                                              |   |   |   |   |   |   |
|----|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|
| 9  | Perreault and McCarthy (1996)  | Positioning shows how customers locate proposed and/or present brands in a market.                                                                                                                                                                                                                                                           | 1 |   |   |   | 1 |   |
| 10 | Trout and Rivkin (1996)        | Positioning is simply concentrating on an idea – or even a word – that defines the company in the minds of consumers.                                                                                                                                                                                                                        | 1 |   |   |   |   |   |
| 11 | Wilson and Gilligan (1997)     | The process of designing an image and value so that the customer within the target segment understand what the company or brand stand for in relation to its competitors.                                                                                                                                                                    | 1 | 1 | 1 | 1 |   |   |
| 12 | Antonides and van Raaij (1998) | Positioning refers to the consumer's perception of a brand amongst other brands. Positioning mainly results from marketing communication regarding brands, social communication and personal experience.                                                                                                                                     | 1 | 1 | 1 |   |   |   |
| 13 | Ligas and Cotte (1999)         | Brand positioning environments: 1) the marketing environment that positions the product with particular associations in the minds of consumer; 2) an individual's environment that adapts the brand to particular life situations and to his/her own self-image; 3) the social environment that facilitates communication through symbolism. | 1 |   |   | 1 |   | 1 |
| 14 | Davis (2000)                   | Positioning is the place in consumers' minds that a brand wants to own. It has to be externally driven and relevant, it has to be differentiated from the competition and, most importantly, it has to be valued.                                                                                                                            | 1 | 1 | 1 |   |   |   |
| 15 | Jain (2000)                    | Placing a brand in that part of the market where it will receive a favourable perception compared to competing products.                                                                                                                                                                                                                     | 1 | 1 | 1 |   | 1 |   |
| 16 | Temporal (2002)                | Positioning takes the basic tangible aspects of the product and actually builds the intangibles in the form of an image in people's minds.                                                                                                                                                                                                   | 1 |   |   | 1 |   |   |
| 17 | Keller (2003)                  | Positioning is all about identifying the optimal location of a brand and its competitors in the minds of consumers to maximize potential benefit to the firm.                                                                                                                                                                                | 1 | 1 |   |   |   |   |
| 18 | Kotler (2003)                  | Positioning is the act of designing the company's offering and image to occupy a distinctive place in the mind of the target market. The end result of positioning is the successful creation of a customer-focused value proposition, a cogent reason why the target market should buy the product.                                         | 1 | 1 | 1 | 1 |   |   |
| 19 | Lilien and Rangaswamy (2003)   | Positioning refers to the set of strategies that firms develop and implement to ensure that these differences occupy a distinct and important position in the minds of customers.<br>Positioning is what you try to do to the minds of customers to help them perceive the product differences clearly.                                      | 1 | 1 |   |   |   |   |
| 20 | Kapferer (2004)                | Positioning a brand means emphasising the distinctive characteristics that make it different from its competitors and appealing to the public.                                                                                                                                                                                               |   | 1 |   |   |   |   |

|                        |                                       |                                                                                                                                                                                                                                                                                                                                                                                                          |           |           |           |          |          |          |
|------------------------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------|-----------|----------|----------|----------|
| 21                     | Winer (2004)                          | Considering the alternative differentiation possibilities and determining what differential advantages are to be emphasised and communicated to the target customers.                                                                                                                                                                                                                                    | 1         | 1         |           |          |          |          |
| 22                     | Blythe (2005)                         | The grouping of similar product types together in the consumer's perceptual map.                                                                                                                                                                                                                                                                                                                         | 1         |           |           |          |          |          |
| 23                     | Solomon, Marshall, and Stewart (2006) | Developing a marketing strategy aimed at influencing how a particular market segment perceives a good or service in comparison to competition.                                                                                                                                                                                                                                                           | 1         | 1         |           |          |          |          |
| 24                     | Kerin, Hartley, and Rudelius (2007)   | Product positioning refers to the place an offering occupies in consumers' minds on important attributes relative to competitive offerings.                                                                                                                                                                                                                                                              | 1         | 1         |           | 1        |          |          |
| 25                     | Schiffman and Kanuk (2007)            | Positioning conveys the meaning of a good or service in terms of how it fulfills needs of consumers.                                                                                                                                                                                                                                                                                                     |           |           | 1         |          |          |          |
| 26                     | Porter (2008)                         | Performing different activities from rivals' or performing similar activities in different ways.                                                                                                                                                                                                                                                                                                         |           | 1         |           |          |          |          |
| 27                     | Kapferer (2008)                       | Positioning concept relies on the application of Maslow's needs hierarchy and the notion that a need is never ever fully satisfied.                                                                                                                                                                                                                                                                      |           |           | 1         |          |          |          |
| 28                     | Keller (2008)                         | Brand positioning clarifies what a brand is all about, how it is unique and how it is similar to competitors. The aim of brand positioning is thus to explain why consumers should purchase and use a brand's products.                                                                                                                                                                                  | 1         | 1         |           |          |          |          |
| 29                     | Ellwood (2009)                        | Brand positioning refers to all its external activities and, at the same time, it determines behaviour within an organization.                                                                                                                                                                                                                                                                           |           |           |           | 1        |          |          |
| 30                     | Aaker (2012)                          | Positioning should be focused on the emotional and self-expressive benefits of a brand by introducing the brand as an organisation, a person and a symbol.                                                                                                                                                                                                                                               |           |           | 1         | 1        |          | 1        |
| 31                     | Schiffman et al. (2014)               | When used effectively, positioning is a powerful tool that is more effective than the characteristics of the actual product itself. Positioning techniques are important to the success of a brand because consumers evaluate the relevance of brands by comparing them with the consistency of their self-image, purchasing brands that are congruent with this image and avoiding brands that are not. | 1         |           | 1         |          |          |          |
| <b>Sum of elements</b> |                                       |                                                                                                                                                                                                                                                                                                                                                                                                          | <b>23</b> | <b>17</b> | <b>11</b> | <b>9</b> | <b>5</b> | <b>4</b> |

## Theoretical citations and conceptual coding of brand positioning elements (N = 56)

| Author (year)                | Theories, citations about BP                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Differentiation | Competition | Perception in mind | Brand identity | Adaptation to individual needs | Benefits evaluated | Relation, synergy, communication | Compliance with the self-image | Attributes of product | Symbolism | Knowledge of trends |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------|--------------------|----------------|--------------------------------|--------------------|----------------------------------|--------------------------------|-----------------------|-----------|---------------------|
| Levy (1959)                  | By stressing the attributes of their products, marketers can move beyond the utilitarian values of the product and address consumer <b>needs using behavioural concepts [adaptation to individuals]</b> such as <b>imagery, symbolic value [symbolism] and self-concept [brand identity]</b> to create a desired representation of a service or product the <b>mind of the consumer [perception in mind]</b> .                                                                                                                                                                                                        |                 |             | 1                  | 1              | 1                              |                    |                                  |                                |                       | 1         |                     |
| Ries, Trout (1981)           | Positioning is a marketing method for creating the <b>perception of product [perception in mind]</b> , brand or identity <b>[brand identity]</b> . Positioning is where your <b>product's image is placed in relation to image of your competitor's products [competition]</b> . Brand positioning is the sum of all activities that position the brand <b>in the mind of the customer [perception in mind]</b> relative to its <b>competition [competition]</b> . Positioning is not about creating something new or different, but to <b>manipulate the mind set [perception in mind]</b> and existing connections. |                 | 2           | 3                  | 1              |                                |                    |                                  |                                |                       |           |                     |
| J. Wind (1988)               | ...distinguishes six alternative ways of brand positioning:<br>1. Positioning based on <b>the different quality of the product [differentiation]</b><br>2. Positioning based on <b>benefit or solution to a problem [benefits]</b><br>3. Positioning based on <b>for specific uses [attributes of product]</b> .<br>4. Positioning based on <b>oriented to a certain category of buyers [adaptation to individual]</b> .<br>5. Positioning based on <b>relative to a competitor's brand [competition]</b> .<br>6. Positioning based on <b>certain product group boundaries [attributes of product]</b> .              | 1               | 1           |                    |                | 1                              | 1                  |                                  |                                | 2                     |           |                     |
| Kapferer (1992)              | Positioning is a process of <b>emphasizing the brand's distinctive and motivating attributes [differentiation]</b> in the light of <b>competition [competition]</b> . Positioning needs to result from <b>brand identity [brand identity]</b> . Only <b>well-defined brand identity [brand identity]</b> allows to precisely define brand positioning.                                                                                                                                                                                                                                                                | 1               | 1           |                    | 2              |                                |                    |                                  |                                |                       |           |                     |
| Ligas, Cotte (1999)          | Brand positioning environments: 1) the marketing environment that positions the product with particular <b>associations in the minds of consumer [perception in mind]</b> ; 2) an individual's environment that <b>adapts the brand to particular life situations and to his/her own self-image [adaptation to individuals; self-image]</b> ; 3) the social environment that facilitates <b>communication through symbolism [symbolism]</b> .                                                                                                                                                                         |                 |             | 1                  |                | 1                              |                    |                                  | 1                              |                       | 1         |                     |
| Ma (1999)                    | <b>Competitive advantage [competition]</b> is the foundation of superior performance.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 | 1           |                    |                |                                |                    |                                  |                                |                       |           |                     |
| Aaker, Joachimsthaler (2000) | Brand positioning is part of the <b>brand identity [brand identity]</b> and <b>value proposition [benefits]</b> that will be actively transmitted to the target audience.                                                                                                                                                                                                                                                                                                                                                                                                                                             |                 |             |                    | 1              |                                | 1                  |                                  |                                |                       |           |                     |

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |   |   |   |   |   |   |  |   |   |   |  |   |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|--|---|---|---|--|---|
| Davis (2000)             | Positioning is <b>the place in consumers' minds [perception in mind]</b> that a brand wants to own. It has to be externally driven and relevant, it has to be <b>differentiated [differentiation]</b> from the competition <b>[competition]</b> and, most importantly, it <b>has to be valued [benefits]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 1 | 1 | 1 |   |   | 1 |  |   |   |   |  |   |
| Temporal (2002)          | Positioning is vital to brand management because it takes the basic tangible aspects of the product and actually builds the intangibles in the form of an <b>image in people's minds [perception in mind]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |   |   | 1 |   |   |   |  |   |   |   |  |   |
| Keller et al. (2002)     | 7 positioning strategies which could be used by an organization. These strategies are centred on the following aspects:<br>- <b>attributes of the product</b> , such as: size, taste, weight <b>[attributes of product]</b><br>- <b>benefits offered by the organization or product [benefits]</b> , such as: fast delivery, fast remedy;<br>- use/application, such as: <b>products/services used on special occasions [differentiation]</b> ;<br>- user, such as products or services used mainly <b>by the one profile of consumer [adaptation to individuals]</b><br>- competitors: very effective but very difficult to be used due to legal constraints. For example, <b>one company could emphasise its strengths in comparison to another competitor [competition]</b><br>- product or service category: an organization can position itself as product category not usually associated with it <b>[differentiation]</b> .<br>- quality/price: usually used when <b>the offers are not very cheap or of a top quality [competition]</b> . | 2 | 2 |   |   | 1 | 1 |  |   |   | 1 |  |   |
| Gilmore (2002)           | <b>The synergy effect is therefore the crucial benefit [self-image]</b> of this approach allowing at the same time <b>individual attitude towards diverse target groups [adaptation to individual]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |   |   |   |   | 1 |   |  |   | 1 |   |  |   |
| Cravens (2003)           | The essence of the company's offer, indicating the ability of the organisation <b>to meet the needs and preferences of consumers [adaptation to individual]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |   |   |   |   | 1 |   |  |   |   |   |  |   |
| Trout (2003)             | Success, if achieved, must be consolidated and developed not through the weakening, but strengthening the effect on consumer's mind [perception in mind]. Implementation of the trademark positioning must be <b>performed under the rules of fair competition [competition]</b> and strict compliance with the legislation on protection of trademarks.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |   | 1 | 1 |   |   |   |  |   |   |   |  |   |
| Kotler (2003)            | Brand positioning: act of designing the firm offering (s) to occupy a <b>distinctive place [differentiation]</b> in the minds of customers <b>[perception in mind]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 1 |   | 1 |   |   |   |  |   |   |   |  |   |
| Tybout, Sternthal (2005) | There are four major elements of the positioning statement: 1) <b>the target group [adaptation to individual]</b> 2) <b>the frame of reference [brand identity]</b> 3) <b>the point of difference [differentiation]</b> 4) <b>the reason to believe [relations]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 1 |   |   | 1 | 1 |   |  | 1 |   |   |  |   |
| Florin et al. (2007)     | Functional positioning refers primarily to <b>functional [attributes of product]</b> , differentiating brand features <b>[differentiation]</b> of rational nature. This type of positioning allows to develop the brand idea which can solve a <b>specific problem of the target group [adaptation to individual]</b> .<br>Symbolic positioning refers primarily to the target group's emotions. A brand based on this type of positioning focuses on <b>enhancing its image, identity, affinity, social acceptance and life fulfilment of the target group [brand identity]</b> . Therefore, the brand <b>provides the audience with emotional support [perception in mind]</b> . this is type of positioning may also be employed in the concept of a place brand. The third type of positioning is based on the target group's <b>experience [perception in mind]</b> <b>accumulated in contacts with a brand [relations]</b> .                                                                                                                | 1 |   | 2 | 1 | 1 |   |  | 1 |   |   |  | 1 |
| Porter (2008)            | Performing <b>different activities from rivals'</b> or performing similar activities in <b>different ways [differentiation]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 1 |   |   |   |   |   |  |   |   |   |  |   |
| Kapferer (2008)          | Positioning concept <b>relies on the application of Maslow's needs hierarchy [adaptation to individuals]</b> and the notion that a need is never ever fully satisfied.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |   |   |   |   | 1 |   |  |   |   |   |  |   |

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |   |   |   |   |   |   |   |  |   |  |   |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|---|--|---|--|---|
| Keller (2008)            | Brand positioning clarifies what a brand is all about, how it is <b>unique [differentiation]</b> and how it is similar to <b>competitors [competition]</b> . The aim of brand positioning is thus to explain <b>why consumers should purchase and use a brand's products [benefits]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 1 | 1 |   |   |   | 1 |   |  |   |  |   |
| Tomiya (2010)            | Brand positioning should start from its <b>identity [brand identity]</b> . The positioning proposal has to be <b>different, unique [differentiation]</b> and <b>communicated to the –target audience [relations]</b> , clearly showing the <b>advantages of the brand in relation to its key competitors [competition]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 1 | 1 |   | 1 |   |   | 1 |  |   |  |   |
| Clifton (2010)           | A powerful brand positioning is <b>credible [relations]</b> , <b>relevant [adaptation to individual]</b> and <b>differentiates [differentiation]</b> ; it stretches the organisation, enabling it to grow and increase its <b>competitiveness [competition]</b> . But for the idea to have a tangible impact it also must be perfectly executed clearly and consistent. Brand <b>positioning is owning a territory in people's minds [perception in mind]</b> and the marketplace.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 1 | 1 | 1 |   | 1 |   | 1 |  |   |  |   |
| Guidry (2011)            | Brand positioning is one of key concepts conditioning a brand's <b>competitive market position [competition]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |   | 1 |   |   |   |   |   |  |   |  |   |
| Keller (2011)            | In the positioning process, a product becomes significant for the consumer, through the <b>creation of strong, favourable and unique brand associations [brand identity]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |   |   |   | 1 |   |   |   |  |   |  |   |
| Farres (2012)            | <b>Differentiation value [differentiation]</b> can be anything that offers increased performance reduced costs or both when compared with the customer's best alternative.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 1 |   |   |   |   |   |   |  |   |  |   |
| Aaker (2012)             | Positioning should be focused on the <b>emotional and self-expressive benefits of a brand [adaptation to individuals; benefits]</b> by introducing <b>the brand as an organisation, a person and a symbol [brand identity]</b> . Brand positioning requires continual monitoring and adjustment of strategies as the marketplace evolves.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |   |   |   | 1 | 1 | 1 |   |  |   |  |   |
| Kapferer (2012)          | Positioning is a two-way process, covering the determination of the <b>brands competitors [competition]</b> and <b>the distinctive properties of the brand [brand identity]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |   | 1 |   | 1 |   |   |   |  |   |  |   |
| Wheeler (2012)           | Through these strategies, companies determine their <b>position in the consumer's mind [perception in mind]</b> , considering its <b>competitors, and analysing their strengths and weaknesses [competition]</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |   | 1 | 1 |   |   |   |   |  |   |  |   |
| Kevin Lane Keller (2013) | Defining and communicating the <b>competitive [competition]</b> frame of reference, there are three main ways to convey a brand's category membership: <b>communicating category benefits [benefits]</b> , <b>comparing to example [benefits]</b> , and <b>relying on a product descriptor [relations]</b> .<br>2. Choosing <b>points-of-difference [differentiation]</b> . The brand association must be seen as <b>desirable [adaptation to individuals]</b> , deliverable, and <b>differentiating [differentiation]</b> .<br>3. Establishing <b>points-of-parity and points-of-difference [differentiation]</b> : Separate the <b>attributes [attributes of product]</b> , leverage equity of another entity, redefine the relationship.<br>4. <b>Straddle positions [differentiation]</b> : straddle two frames of reference with one set of points- of-difference and points-of-parity.<br>5. Updating positioning over time: laddering and reacting.<br>According to Maslow, higher-level needs become relevant once lower-level <b>needs have been satisfied [adaptation to individuals]</b> . Laddering thus progresses from attributes to <b>benefits [benefits]</b> to more abstract values or motivations.<br>Reacting: Competitive actions are often directed at eliminating points-of-difference to make them points-of-parity or to strengthen or establish new <b>points-of-difference [differentiation]</b> .<br>6. Developing a Good Positioning. First, a good positioning has a “foot in the present” and a “foot in the future.” <b>[knowledge of trends]</b> Second, a good positioning is careful to identify all relevant points-of-parity. Third, a good positioning should reflect a consumer point of view in terms of the <b>benefits that consumers derive from the brand [benefits]</b> . | 5 | 1 |   |   | 2 | 4 | 1 |  | 1 |  | 1 |

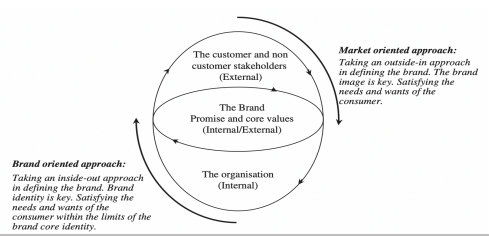


|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |    |    |    |    |    |    |   |   |   |   |   |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|----|----|---|---|---|---|---|
|                         | <p>Successful brand building three models:</p> <p>1. Brand positioning model describes how to establish <b>competitive advantages [competition]</b> in the minds of customers in the marketplace <b>[perception in mind]</b>;</p> <p>2. Brand resonance model describes how to take these competitive advantages and <b>create intense, active loyalty relationships with customers for brands [relations]</b>; and</p> <p>3. Brand value chain model describes how to trace the value creation process to better understand <b>the financial impact of marketing expenditures and investments to create loyal customers and strong brands [benefits]</b>.</p> <p>Brand positioning model describes how to establish <b>competitive advantages [competition; differentiation]</b> in the minds of customers <b>[perception in mind]</b> in the marketplace.</p> |    | 1  | 1  | 1  |    | 1  | 1 |   |   |   |   |
|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 1  | 1  | 1  |    |    |    |   |   |   |   |   |
| Schiffman et al. (2014) | Positioning is important to the success of a brand because consumers evaluate the relevance of brands by <b>comparing them with the consistency of their self-image [self-image]</b> , purchasing brands that are congruent with this image and avoiding brands that are not.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |    |    |    |    |    |    | 1 |   |   |   |   |
| Schiffman et al. (2014) | When used effectively, positioning is a powerful tool that is more effective than the characteristics of the actual product itself. Positioning techniques are important to the success of a brand because <b>consumers evaluate the relevance of brands by comparing them with the consistency of their self-image [self-image]</b> , purchasing brands that are <b>congruent with this image and avoiding brands that are not [perception in mind]</b> .                                                                                                                                                                                                                                                                                                                                                                                                      |    |    | 1  |    |    |    | 1 |   |   |   |   |
| Kotler (2016)           | Brand must have a clear and consonant brand positioning <b>differentiation [differentiation]</b> integrity standing. ...The company should start by setting the brand's purpose, <b>use positioning and differentiation [differentiation]</b> to communicate the brand's purpose, and ultimately <b>enrich the brand's identity [brand identity]</b> . Brand trust is essential <b>[relations]</b> , and the final consideration is <b>whether the brand delivers brand beneficence [benefits]</b> : does the brand serve well the person and the society?                                                                                                                                                                                                                                                                                                      | 2  |    |    | 1  |    | 1  | 1 |   |   |   |   |
| Total                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 21 | 18 | 16 | 13 | 13 | 12 | 7 | 4 | 4 | 2 | 2 |

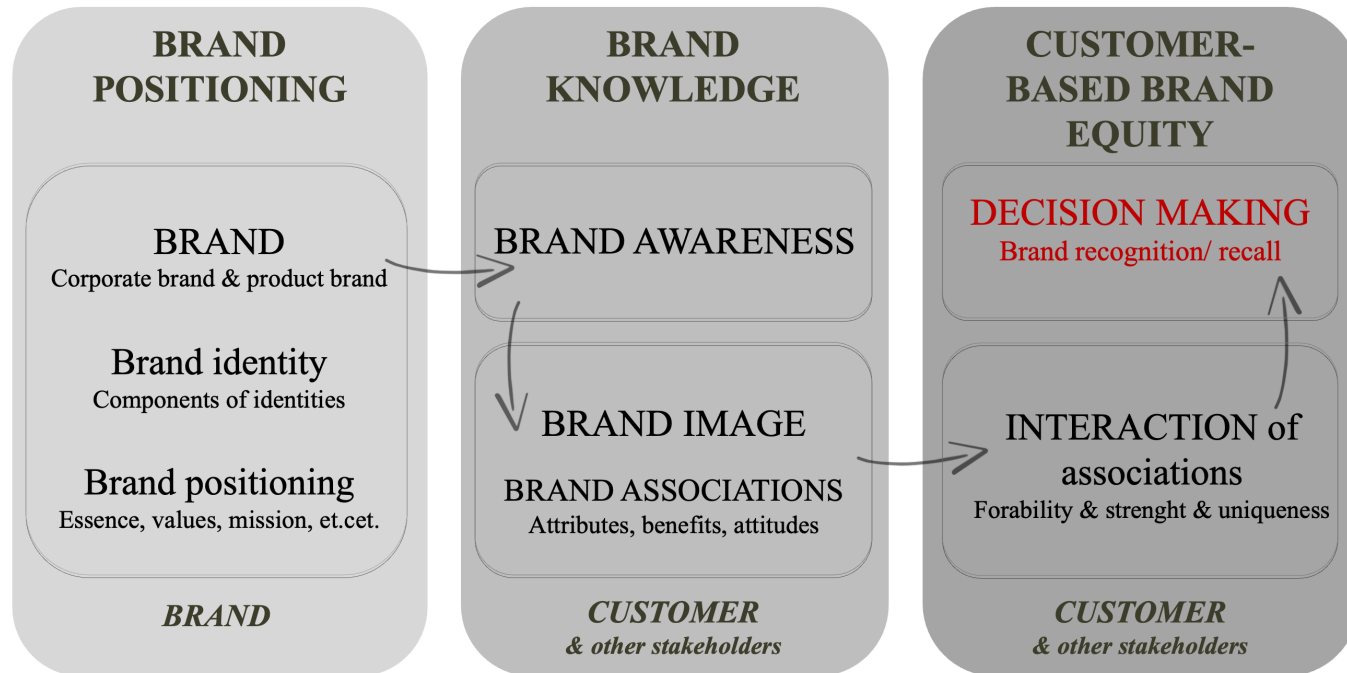
Appendix 3  
Brand positioning models (N = 9)

| No. | Year | Author         | Name of model                 | Model                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----|------|----------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1   | 1986 | Park W. et al. | Brand concept management      | <p>The diagram illustrates the Brand Concept Management model. It begins with 'Brand Concept: Steps' leading to 'Brand Concepts'. This leads to 'Positioning Strategies', which then leads to 'Developing Marketing Mix Given Competitive Situation'. This step leads to 'Consumer Perceptions of Image/Position'. The main process is divided into four stages: Selection, Introduction, Elaboration, and Reinforcement. Each stage has three sub-steps: Functional, Symbolic, and Experiential. These sub-steps lead to various marketing mix elements: Functional (Functional Positioning, Reference Group/Associations, Cognitive/Sensory Stimulation), Symbolic (Problem Solving, Specialized, Problem Solving, Generalization Strategy), and Experiential (Market Shielding Strategy, Brand Secondary Strategy, Brand Network Strategy). The final outcome is 'Brand Position Relative to Competitors'.</p>                                                   |
| 2   | 1996 | Aaker D.       | Brand identity planning model | <p>The diagram illustrates the Brand Identity Planning model, structured into four phases:         <ul style="list-style-type: none"> <li><b>Phase 1- Developing a brand vision:</b> Step 1: Elements of a brand vision.</li> <li><b>Phase 2- Determining BrandPicture:</b> Step 2: Determining brand image, Step 3: Creating brand contract, Step 4: Brand-based customer model.</li> <li><b>Phase 3- Developing a brand asset management strategy:</b> Step 5: Positioning the brand, Step 6: Extending the brand, Step 7: Communicating brand's positioning, Step 8: Leveraging the brand, Step 9: Pricing the brand.</li> <li><b>Phase 4- Supporting a brand management culture:</b> Step 10: Measuring return on brand investment, Step 11: Establishing a brand-based culture.</li> </ul> </p>                                                                                                                                                                |
| 3   | 1999 | Urde M.        | Brand hexagon                 | <p>The diagram illustrates the Brand Hexagon model, a hexagonal structure with six vertices and internal relationships:         <ul style="list-style-type: none"> <li><b>Vertices:</b> Target audience, Company name, Brand name, Vision &amp; mission, Product, and Product category.</li> <li><b>Internal Relationships:</b> <ul style="list-style-type: none"> <li>Target audience is connected to Company name (1) Loyalty) and Product category (1) Awareness).</li> <li>Company name is connected to Brand name (2) Personality).</li> <li>Brand name is connected to Vision &amp; mission (2) Associations).</li> <li>Vision &amp; mission is connected to Product (Quality).</li> <li>Product is connected to Product category (Quality).</li> <li>Product category is connected to Target audience (1) Awareness).</li> <li>Central elements: Positioning: Core values and Communication are connected to all other elements.</li> </ul> </li> </ul> </p> |

|   |      |                  |                                                               |  |
|---|------|------------------|---------------------------------------------------------------|--|
| 4 | 2001 | Keller K.L.      | Customer-based brand equity model                             |  |
| 5 | 2002 | Davis S.         | Brand asset management process                                |  |
| 6 | 2003 | Urde M.          | Internal and external core value-based brand building process |  |
| 7 | 2010 | Kotler P. et al. | 3i model                                                      |  |

|   |      |           |                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---|------|-----------|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8 | 2011 | Urde M.   | Market and brand-oriented framework |  <p>The diagram illustrates two approaches to brand definition. On the left, the 'Brand oriented approach' is described as an 'inside-out' process where brand identity is key, satisfying consumer needs within the limits of the brand's core identity. On the right, the 'Market oriented approach' is described as an 'outside-in' process where brand image is key, satisfying consumer needs and wants. The central diagram shows three concentric circles: the outermost circle represents 'The customer and non customer stakeholders (External)', the middle circle represents 'The Brand Promise and core values (Internal/External)', and the innermost circle represents 'The organisation (Internal)'. Arrows indicate a clockwise flow from the internal organization through the brand promise to the external stakeholders, and a counter-clockwise flow from the external stakeholders back through the brand promise to the internal organization.</p> |
| 9 | 2016 | Kotler P. | 6-step branding conceptual model    | <p><b>PHILIP KOTLER'S 6-STEP BRANDING CONCEPTUAL MODEL</b></p>  <p>The model consists of six sequential steps in rectangular boxes: BRAND PURPOSE, BRAND POSITIONING, BRAND DIFFERENTIATION, BRAND IDENTITY, BRAND TRUST, and BRAND BENEFICENCE.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

Decision-making model from the prism of positioning, simplified version  
(created by the author, adapting Keller's statement about conceptualising, measuring, and managing customer-based brand equity, 2019)



**Participants:**

Marketing professionals, brand strategists, and executives with experience in BD, innovation, and/or export branding. Average experience: 9 years.

**Total participants:** 16 individuals representing 16 different organisations, divided into two in-person focus group sessions.

**Date:** October 2023

**Duration:** 80 minutes per session

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**Section A. Participant profile (to be filled before the discussion)**

1. **Current professional role/title:**
2. **Expertise (linked with marketing):**
3. **Organisation's industry:**
4. **Size of organisation:**
  - ☐ Startup
  - ☐ Small or medium enterprise (SME)
  - ☐ Large enterprise
  - ☐ Government institution
5. **Does your organisation operate in international/export markets?**
  - ☐ Yes
  - ☐ No
6. **Age:** \_\_\_\_\_
7. **Years of experience in branding or marketing:** \_\_\_\_\_

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**Section B. Model structure and conceptual coherence**

1. How clear and understandable is the structure of the BP model as presented?
2. Are the four dimensions logically organized and conceptually sound?
3. Are the titles and definitions of the model's elements relevant and understandable in your professional context?
4. Are any dimensions or elements unclear, missing, or redundant in your view?
5. Do you find the model's structure unique or distinctive compared to frameworks you've encountered?

---

**Section C. Practical relevance and application potential**

6. To what extent does the model align with BP processes you have used or observed in practice?
7. In what specific use cases (e.g., BD, repositioning, communication strategy) do you see this model being useful?

8. Do you find the model particularly applicable for export or international branding contexts? Why?
  9. Would this model be valuable for evaluating an existing brand's current positioning?
- 

#### **Section D. Interrelationships between elements**

10. Do you observe in your experience that the strength or weakness of one element (e.g., brand image) affects others (e.g., audience relationship, brand purpose)?
  11. Do you agree that elements in the model interact both horizontally (across dimensions) and vertically (within dimensions)?
  12. How helpful is the model in diagnosing BP weaknesses or gaps?
- 

#### **Section E. External factors and strategic context**

13. How important are external macro-environmental factors (e.g., political, legal, technological, cultural) in shaping BP decisions?
  14. Can you recall examples when external factors forced significant repositioning or messaging changes?
  15. Should a dedicated fifth dimension for External Influences be integrated into the model? If so, what elements should it include?
- 

#### **Section F. Overall feedback and suggestions**

16. What are your general impressions of the model's completeness and relevance?
  17. Would you recommend any changes to specific terms or element labels to enhance clarity or precision?
  18. What would be your main suggestions for further improving or applying the model?
  19. Do you see value in using this model as a strategic tool in your organisation or industry?
- 

#### **Section G. Strategic integration of BP**

20. How would you evaluate the impact of BP on OP?
21. Do you believe that effective BP can enhance OS?
22. How do you assess the inclusion of BP in SM processes?
23. In your opinion, what are the main advantages or risks of integrating BP into SM?
24. Do you think the impact of BP differs depending on company size or industry?

*Please provide examples if possible.*

| Code / Theme                                       | Support (participants out of 16) | Most mentioned dimensions or elements | Quote / Typical example                                                  |
|----------------------------------------------------|----------------------------------|---------------------------------------|--------------------------------------------------------------------------|
| Need to include external factors                   | 9                                | External Influences (PESTLE)          | “We can't ignore what is happening in the world, economy, politics...”   |
| Differentiation as a key to successful positioning | 15                               | Differentiation, Value proposition    | “You can't survive without a unique offer.”                              |
| Role of the team in brand identity                 | 14                               | Brand identity, Team                  | “A brand starts with the people who work in it.”                         |
| Mission and vision as part of brand identity       | 12                               | Identity, Mission, Vision             | “Mission and vision derive from our core ideas.”                         |
| Need to revise element formulations                | 4                                | Brand Purpose, Market Position        | “We started with the positioning and then developed the product.”        |
| Leadership involvement in BP                       | 6                                | Leadership, BP                        | “Leadership decisions are crucial for maintaining BP consistency.”       |
| Model suitability for export-driven brands         | 13                               | Market Position, Communication        | “In foreign markets, it's essential that everything is clearly defined.” |
| Need to describe model elements in more detail     | 4                                | All dimensions (structure)            | “Some elements should be described more specifically.”                   |
| BP as part of strategic planning                   | 14                               | Strategic Performance, Brand Purpose  | “There's no meaningful strategy without positioning.”                    |
| Differences in terminology across contexts         | 3                                | Terminology, Model clarity            | “Terminology differs by sector, but the core remains.”                   |
| Model is understandable and intuitive              | 15                               | —                                     | “It seems understandable and can be used with the team.”                 |



**Participants:**

Management-level experts, including company founders/owners and top executives, all with direct experience in SM and BP within respective organisations, average experience: 12 years.

**Total participants:** 13 participants from 9 industries; 10 of the companies export their products or services; 8 of the participants have experience in innovation development and commercialisation.

**Date:** February and March 2024

**Duration:** 90 minutes per session, in-person.

**Scale for Evaluation:**

- Dimension 1 (External influences) – rated on a **ten-point scale** (1 = Not followed at all; 10 = Followed closely).
- Dimensions 2–5 – rated on a **three-point scale** (1 = Weak, 2 = Moderate, 3 = Strong).

Additional open-ended questions were included to provide qualitative context and support thematic coding.

**Participant profile (to be filled before the discussion)**

1. **Current professional role/title:**
2. **Expertise (also linked with marketing):**
3. **Organisation's industry:**
4. **Size of organisation:**
  - ☐ Startup
  - ☐ Small or medium enterprise (SME)
  - ☐ Large enterprise
  - ☐ Government institution
5. **Does your organisation operate in international/export markets?**
  - ☐ Yes
  - ☐ No
6. **Does your experience include innovation development and commercialisation?**
  - ☐ Yes
  - ☐ No
7. **Age:** \_\_\_\_\_
8. **Years of experience within branding or marketing:** \_\_\_\_\_

**Dimension 1 – External influences**

1. How closely does your company follow **social and cultural** changes affecting your market?
2. To what extent do you monitor and analyse **economic** factors that influence brand or product development?

3. How actively do you track **legal and regulatory** developments relevant to your industry and branding strategy?
  4. How relevant are **technological** developments in shaping your BP or innovation strategies?
  5. How significant are **environmental and sustainability-related** issues in your brand's communication or innovation?
  6. How much attention do you pay to **political factors** that could influence your business and BP?
- 

#### **Dimension 2 – Key elements**

7. Do you have a clearly defined **target audience** for your brand?
8. Is there **alignment between your brand and company identity**?
9. Does your **team represent the brand's values** and identity in communication and decision-making?
10. Do your **products or services reflect the brand promise** and align with market needs?
11. How well do you understand your **competitors' BP and strategies**?

*Please provide examples if possible.*

*Are any improvements needed to the positioning in this dimension? Why?*

---

#### **Dimension 3 – Strategic position**

12. How strong is your brand's **recognition and relationship** with your target audience?
13. How well are the **brand identity, mission, and vision** defined and communicated internally and externally?
14. How clearly is your **brand purpose and product concept** articulated and differentiated?
15. What is your current **market position**, and how does it compare to your strategic objectives?
16. How effectively is your brand positioned in relation to **key competitors**?

*Please provide examples if possible.*

*Are any improvements needed to the positioning in this dimension? Why?*

---

#### **Dimension 4 – Positioning performance**

17. How would you evaluate **brand trust** among your customers or stakeholders?
18. How clearly defined is your **brand image** in the minds of consumers?
19. How strong is your **brand equity** based on recognition, reputation, and perceived value?
20. How clearly is your **value proposition** communicated and understood?
21. How well is your brand **differentiated** from others in your market?

*Please provide examples if possible.*

*Are any improvements needed to the positioning in this dimension? Why?*

---

### **Dimension 5 – outcomes**

22. How would you evaluate the level of **customer loyalty** toward your brand?
23. Do customers feel a **sense of belonging or identification** with your brand?
24. To what extent are your **brand values shared and recognised** by your audience?
25. How does your brand contribute to customers' **status or lifestyle aspirations**?
26. What is the perceived **value-for-price** ratio associated with your brand?

*Please provide examples if possible.*

*Are any improvements needed to the positioning in this dimension? Why?*

---

### **Questions for strategic integration of BP**

27. How would you evaluate the impact of BP on OP?
  28. Do you believe that effective BP can enhance OS?
  29. How do you assess the inclusion of BP in SM processes?
  30. In your opinion, what are the main advantages or risks of integrating BP into SM?
  31. Do you think the impact of BP differs depending on company size or industry?
- 

### **Questions for innovation-experienced participants** (only for those with prior innovation development experience – N = 8)

32. How has your BP approach influenced the development of your innovations?
33. In your experience, how can a clear brand position support product innovation or market entry?
34. Can you provide an example where BP contributed to the success of innovation?
35. What challenges have you faced in aligning your brand strategy with innovation?

# Appendix 8

## Initial expert evaluation of brand positioning model dimensions (unscaled data)

|  |                                        |
|--|----------------------------------------|
|  | Strong element                         |
|  | The strongest element of the dimension |
|  | The weakest element of the dimension   |

| Interviewee | Industry                 | EXTERNAL INFLUENCES              |          |       |               |               |           | INTERNAL INFLUENCES       |                 |      |          |             | INTERNAL INFLUENCES             |                                 |                                 |                 |             | INTERNAL INFLUENCES                  |             |              |                   |                 | INTERNAL INFLUENCES   |           |        |        |       |
|-------------|--------------------------|----------------------------------|----------|-------|---------------|---------------|-----------|---------------------------|-----------------|------|----------|-------------|---------------------------------|---------------------------------|---------------------------------|-----------------|-------------|--------------------------------------|-------------|--------------|-------------------|-----------------|-----------------------|-----------|--------|--------|-------|
|             |                          | Dimension 1: External influences |          |       |               |               |           | Dimension 2: Key elements |                 |      |          |             | Dimension 3: Strategic position |                                 |                                 |                 |             | Dimension 4: Positioning performance |             |              |                   |                 | Dimension 5: Outcomes |           |        |        |       |
|             |                          | 10-point scale                   |          |       |               |               |           | 3-point scale             |                 |      |          |             | 3-point scale                   |                                 |                                 |                 |             | 3-point scale                        |             |              |                   |                 | 3-point scale         |           |        |        |       |
|             | Elements                 | Social & cultural                | Economic | Legal | Technological | Environmental | Political | Target audience           | Company & Brand | Team | Products | Competitors | Recognition & Relationship      | Brand identity, Mission, Vision | Brand purpose & Product concept | Market position | Competition | Brand trust                          | Brand image | Brand equity | Value proposition | Differentiation | Loyalty               | Belonging | Values | Status | Price |
| A           | Food production          | 8                                | 7        | 7     | 9             | 10            | 8         | 3                         | 3               | 2    | 3        | 3           | 2                               | 2                               | 3                               | 1               | 2           | 2                                    | 3           | 3            | 2                 | 3               | 2                     | 2         | 3      | 2      | 2     |
| B           | Marketing services       | 8                                | 8        | 6     | 9             | 7             | 7         | 2                         | 2               | 2    | 3        | 3           | 1                               | 2                               | 2                               | 2               | 2           | 2                                    | 2           | 2            | 2                 | 2               | 2                     | 2         | 2      | 2      | 2     |
| C           | Interior design services | 9                                | 9        | 7     | 9             | 8             | 8         | 2                         | 2               | 3    | 3        | 2           | 3                               | 2                               | 3                               | 3               | 3           | 3                                    | 3           | 2            | 2                 | 3               | 2                     | 3         | 3      | 3      | 3     |
| D           | Food production          | 7                                | 7        | 7     | 9             | 7             | 8         | 3                         | 3               | 2    | 2        | 3           | 3                               | 3                               | 3                               | 2               | 2           | 3                                    | 3           | 2            | 2                 | 3               | 3                     | 3         | 3      | 2      | 2     |
| E           | Food production          | 8                                | 9        |       | 9             | 9             | 8         | 2                         | 3               | 3    | 2        | 3           | 3                               | 2                               | 2                               | 2               | 2           | 3                                    | 3           | 3            | 3                 | 2               | 3                     | 3         | 3      | 3      | 2     |
| F           | Catering services        | 7                                | 6        | 9     | 9             | 7             | 10        | 2                         | 1               | 2    | 2        | 3           | 1                               | 1                               | 2                               | 2               | 2           | 2                                    | 1           | 2            | 2                 | 2               | 2                     | 2         | 2      | 1      | 2     |
| G           | Retail trade             | 7                                | 7        | 7     | 8             | 9             | 8         | 3                         | 1               | 2    | 2        | 2           | 1                               | 1                               | 1                               | 2               | 2           | 2                                    | 2           | 2            | 2                 | 1               | 2                     | 2         | 2      | 2      | 2     |
| H           | Food production          | 7                                | 9        | 8     | 10            | 10            | 9         | 3                         | 3               | 2    | 2        | 3           | 1                               | 3                               | 2                               | 3               | 3           | 3                                    | 2           | 2            | 3                 | 2               | 2                     | 2         | 2      | 3      | 2     |
| I           | Telecommunication        | 8                                | 7        | 7     | 10            | 9             | 9         | 3                         | 3               | 2    | 3        | 3           | 3                               | 3                               | 3                               | 2               | 3           | 2                                    | 3           | 3            | 2                 | 2               | 2                     | 2         | 2      | 3      | 3     |
| J           | Certification            | 10                               | 10       | 8     | 9             | 6             | 10        | 1                         | 1               | 1    | 2        | 2           | 1                               | 1                               | 2                               | 3               | 2           | 1                                    | 1           | 1            | 2                 | 1               | 1                     | 1         | 2      | 1      | 2     |
| K           | Cosmetics production     | 7                                | 8        | 7     | 8             | 10            | 9         | 2                         | 2               | 1    | 1        | 1           | 1                               | 1                               | 2                               | 1               | 1           | 2                                    | 2           | 1            | 1                 | 2               | 2                     | 2         | 3      | 2      | 2     |
| L           | Training company         | 9                                | 9        | 6     | 7             | 6             | 8         | 2                         | 2               | 2    | 2        | 3           | 2                               | 2                               | 2                               | 2               | 2           | 2                                    | 2           | 2            | 2                 | 1               | 2                     | 2         | 2      | 2      | 2     |
| M           | Food production          | 7                                | 9        | 7     | 9             | 7             | 8         | 2                         | 2               | 2    | 2        | 3           | 2                               | 2                               | 2                               | 2               | 2           | 2                                    | 2           | 2            | 2                 | 2               | 2                     | 2         | 2      | 2      | 2     |
| TOTAL       |                          | 102                              | 105      | 94    | 115           | 105           | 110       | 30                        | 28              | 26   | 29       | 34          | 24                              | 25                              | 29                              | 27              | 28          | 29                                   | 29          | 27           | 27                | 26              | 27                    | 28        | 31     | 28     | 28    |
| AVG         |                          | 7.8                              | 8.1      | 7.2   | 8.8           | 8.1           | 8.5       | 2.3                       | 2.2             | 2.0  | 2.2      | 2.6         | 1.8                             | 1.9                             | 2.2                             | 2.1             | 2.2         | 2.2                                  | 2.2         | 2.1          | 2.1               | 2.0             | 2.1                   | 2.2       | 2.4    | 2.2    | 2.2   |

## Normalised data of expert interviews

| Participants | Dimension 1: External influences |      |      |      |      |      | Dimension 2: Key elements |      |      |      |      | Dimension 3: Strategic position |      |      |      |      | Dimension 4: Positioning performance |      |      |      |      | Dimension 5: Outcome |      |      |      |      |
|--------------|----------------------------------|------|------|------|------|------|---------------------------|------|------|------|------|---------------------------------|------|------|------|------|--------------------------------------|------|------|------|------|----------------------|------|------|------|------|
|              | D1.1                             | D1.2 | D1.3 | D1.4 | D1.5 | D1.6 | D2.1                      | D2.2 | D2.3 | D2.4 | D2.5 | D3.1                            | D3.2 | D3.3 | D3.4 | D3.5 | D4.1                                 | D4.2 | D4.3 | D4.4 | D4.5 | D5.1                 | D5.2 | D5.3 | D5.4 | D5.5 |
| A            | 0.80                             | 0.70 | 0.70 | 0.90 | 1.00 | 0.80 | 1.00                      | 1.00 | 0.67 | 1.00 | 1.00 | 0.67                            | 0.67 | 1.00 | 0.33 | 0.67 | 0.67                                 | 1.00 | 1.00 | 0.67 | 1.00 | 0.67                 | 0.67 | 1.00 | 0.67 | 0.67 |
| B            | 0.80                             | 0.80 | 0.60 | 0.90 | 0.70 | 0.70 | 0.67                      | 0.67 | 0.67 | 1.00 | 1.00 | 0.33                            | 0.67 | 0.67 | 0.67 | 0.67 | 0.67                                 | 0.67 | 0.67 | 0.67 | 0.67 | 0.67                 | 0.67 | 0.67 | 0.67 | 0.67 |
| C            | 0.90                             | 0.90 | 0.70 | 0.90 | 0.80 | 0.80 | 0.67                      | 0.67 | 1.00 | 1.00 | 0.67 | 1.00                            | 0.67 | 1.00 | 1.00 | 1.00 | 1.00                                 | 1.00 | 0.67 | 0.67 | 1.00 | 0.67                 | 1.00 | 1.00 | 1.00 | 1.00 |
| D            | 0.70                             | 0.70 | 0.70 | 0.90 | 0.70 | 0.80 | 1.00                      | 1.00 | 0.67 | 0.67 | 1.00 | 1.00                            | 1.00 | 1.00 | 0.67 | 0.67 | 1.00                                 | 1.00 | 0.67 | 0.67 | 1.00 | 1.00                 | 1.00 | 1.00 | 0.67 | 0.67 |
| E            | 0.80                             | 0.90 | 0.80 | 0.90 | 0.90 | 0.80 | 0.67                      | 1.00 | 1.00 | 0.67 | 1.00 | 1.00                            | 0.67 | 0.67 | 0.67 | 0.67 | 1.00                                 | 1.00 | 1.00 | 1.00 | 0.67 | 1.00                 | 1.00 | 1.00 | 1.00 | 0.67 |
| F            | 0.70                             | 0.60 | 0.90 | 0.90 | 0.70 | 1.00 | 0.67                      | 0.33 | 0.67 | 0.67 | 1.00 | 0.33                            | 0.33 | 0.67 | 0.67 | 0.67 | 0.67                                 | 0.33 | 0.67 | 0.67 | 0.67 | 0.67                 | 0.67 | 0.67 | 0.33 | 0.67 |
| G            | 0.70                             | 0.70 | 0.70 | 0.80 | 0.90 | 0.80 | 1.00                      | 0.33 | 0.67 | 0.67 | 0.67 | 0.33                            | 0.33 | 0.33 | 0.67 | 0.67 | 0.67                                 | 0.67 | 0.67 | 0.67 | 0.33 | 0.67                 | 0.67 | 0.67 | 0.67 | 0.67 |
| H            | 0.70                             | 0.90 | 0.80 | 1.00 | 1.00 | 0.90 | 1.00                      | 1.00 | 0.67 | 0.67 | 1.00 | 0.33                            | 1.00 | 0.67 | 1.00 | 1.00 | 1.00                                 | 0.67 | 0.67 | 1.00 | 0.67 | 0.67                 | 0.67 | 0.67 | 1.00 | 0.67 |
| I            | 0.80                             | 0.70 | 0.70 | 1.00 | 0.90 | 0.90 | 1.00                      | 1.00 | 0.67 | 1.00 | 1.00 | 1.00                            | 1.00 | 1.00 | 0.67 | 1.00 | 0.67                                 | 1.00 | 1.00 | 0.67 | 0.67 | 0.67                 | 0.67 | 0.67 | 1.00 | 1.00 |
| J            | 1.00                             | 1.00 | 0.80 | 0.90 | 0.60 | 1.00 | 0.33                      | 0.33 | 0.33 | 0.67 | 0.67 | 0.33                            | 0.33 | 0.67 | 1.00 | 0.67 | 0.33                                 | 0.33 | 0.33 | 0.67 | 0.33 | 0.33                 | 0.33 | 0.67 | 0.33 | 0.67 |
| K            | 0.70                             | 0.80 | 0.70 | 0.80 | 1.00 | 0.90 | 0.67                      | 0.67 | 0.33 | 0.33 | 0.33 | 0.33                            | 0.33 | 0.67 | 0.33 | 0.33 | 0.67                                 | 0.67 | 0.33 | 0.33 | 0.67 | 0.67                 | 0.67 | 1.00 | 0.67 | 0.67 |
| L            | 0.90                             | 0.90 | 0.60 | 0.70 | 0.60 | 0.80 | 0.67                      | 0.67 | 0.67 | 0.67 | 1.00 | 0.67                            | 0.67 | 0.67 | 0.67 | 0.67 | 0.67                                 | 0.67 | 0.67 | 0.67 | 0.33 | 0.67                 | 0.67 | 0.67 | 0.67 | 0.67 |
| M            | 0.70                             | 0.90 | 0.70 | 0.90 | 0.70 | 0.80 | 0.67                      | 0.67 | 0.67 | 0.67 | 1.00 | 0.67                            | 0.67 | 0.67 | 0.67 | 0.67 | 0.67                                 | 0.67 | 0.67 | 0.67 | 0.67 | 0.67                 | 0.67 | 0.67 | 0.67 | 0.67 |

## Interview results: thematic coding structure and emergent categories

| HBPM dimension                             | Deductive code                               | Emergent themes (inductive)                                                                                                             |
|--------------------------------------------|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| D1                                         | Attention to external scanning               | Selective relevance of macro trends;<br>Disconnect with internal brand planning                                                         |
| D2                                         | Brand–team alignment;<br>stakeholder roles   | Leadership role in brand representation;<br>Internal advocacy gaps                                                                      |
| D3                                         | Clarity of brand purpose and identity        | Tensions between mission and execution;<br>Differentiation challenges                                                                   |
| D4                                         | Value proposition and brand equity           | Emotional connection as performance driver;<br>Underinvestment in equity building                                                       |
| D5                                         | Loyalty, belonging, value perception         | Importance of shared values; Price sensitivity; Fragmented brand loyalty across segments                                                |
| Strategic Integration                      | Role of BP in strategy formulation           | Perceived added value of positioning in decision-making; Need for internalisation of positioning logic                                  |
| Innovation Fit (Model Dimensions/Elements) | Application of HBPM in innovation management | Certain dimensions (e.g., D2, D3, D4) viewed as especially relevant for product development, differentiation, and go-to-market planning |
| BP for innovations                         | Role of BP in innovation implementation      | BP as innovation enabler; Influence of company lifecycle stage                                                                          |

Interview results: distribution of  
strong and weak element scores across organisations

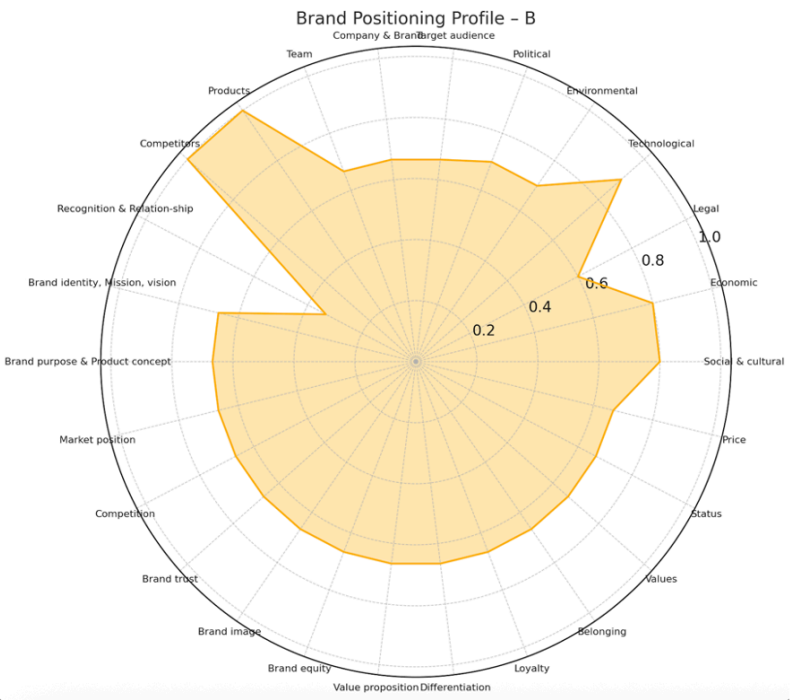
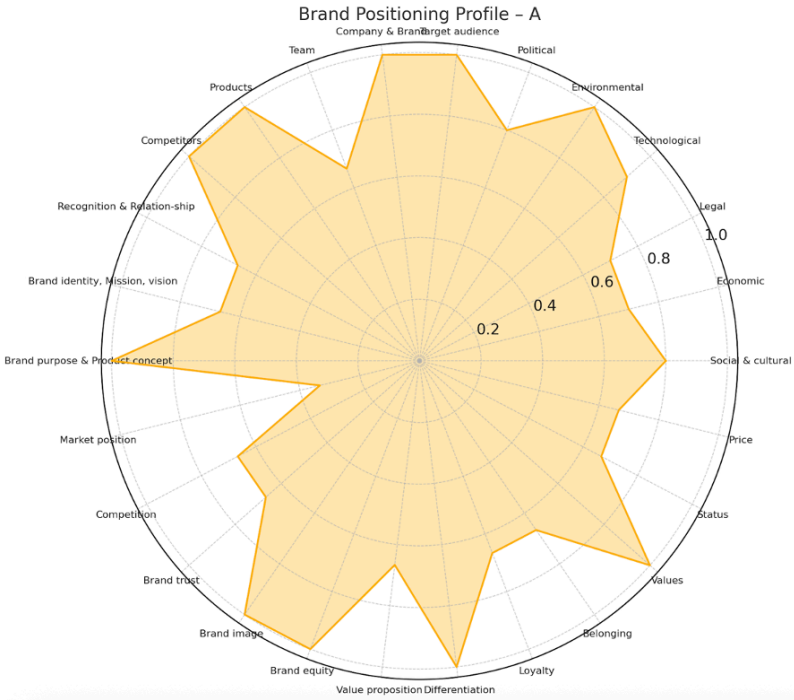
| Organisation | Strong elements                                                                                                                                                                                                                                                                                                                                     | Weak elements                                    |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| <b>A</b>     | Environmental (1.00), Target audience (1.00), Company & Brand (1.00), Products (1.00), Competitors (1.00), Brand purpose & Product concept (1.00), Brand image (1.00), Brand equity (1.00), Differentiation (1.00), Values (1.00), Technological (0.90)                                                                                             | Market position (0.33)                           |
| <b>B</b>     | Products (1.00), Competitors (1.00), Technological (0.90)                                                                                                                                                                                                                                                                                           | Recognition & Relation-ship (0.33), Legal (0.60) |
| <b>C</b>     | Team (1.00), Products (1.00), Recognition & Relation-ship (1.00), Brand purpose & Product concept (1.00), Market position (1.00), Competition (1.00), Brand trust (1.00), Brand image (1.00), Differentiation (1.00), Belonging (1.00), Values (1.00), Status (1.00), Price (1.00), Social & cultural (0.90), Economic (0.90), Technological (0.90) | Not identified                                   |
| <b>D</b>     | Target audience (1.00), Company & Brand (1.00), Competitors (1.00), Recognition & Relation-ship (1.00), Brand identity, Mission, Vision (1.00), Brand purpose & Product concept (1.00), Brand trust (1.00), Brand image (1.00), Differentiation (1.00), Loyalty (1.00), Belonging (1.00), Values (1.00), Technological (0.90)                       | Not identified                                   |
| <b>E</b>     | Company & Brand (1.00), Team (1.00), Competitors (1.00), Recognition & Relation-ship (1.00), Brand trust (1.00), Brand image (1.00), Brand equity (1.00), Value proposition (1.00), Loyalty (1.00),                                                                                                                                                 | Not identified                                   |

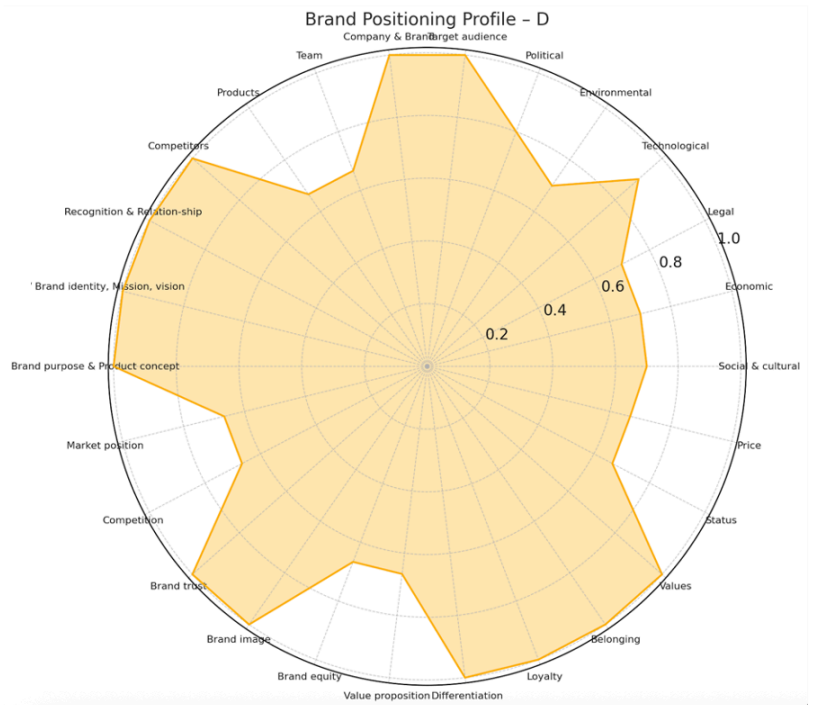
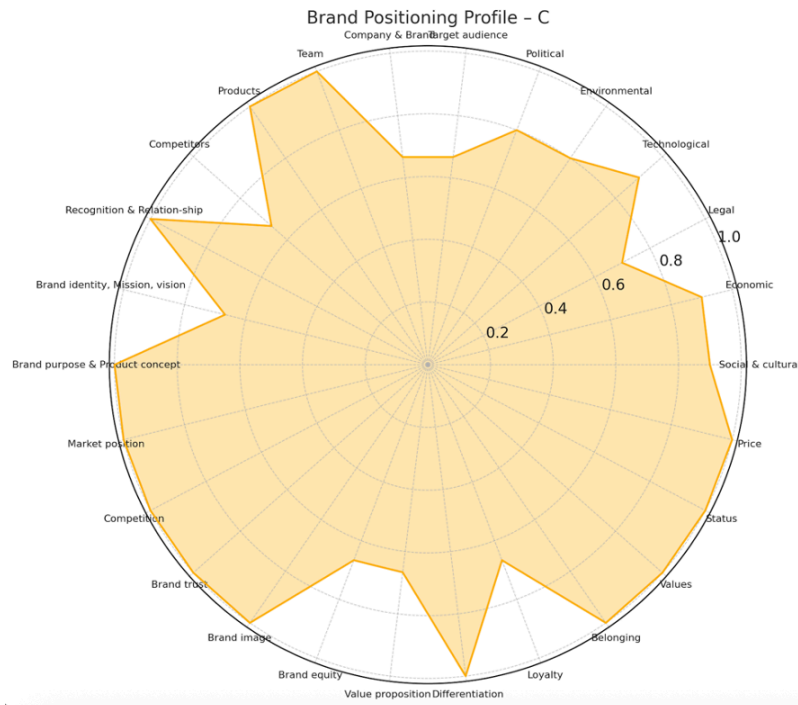
|          |                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                 |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          | Belonging (1.00), Values (1.00),<br>Status (1.00), Economic (0.90),<br>Technological (0.90), Environmental<br>(0.90)                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                 |
| <b>F</b> | Political (1.00), Competitors (1.00),<br>Legal (0.90), Technological (0.90)                                                                                                                                                                                                                                                                                                                | Company & Brand (0.33),<br>Recognition & Relation-ship<br>(0.33), Brand identity, Mission,<br>Vision (0.33), Brand image<br>(0.33), Status (0.33), Economic<br>(0.60)                                                                           |
| <b>G</b> | Target audience (1.00),<br>Environmental (0.90)                                                                                                                                                                                                                                                                                                                                            | Company & Brand (0.33),<br>Recognition & Relation-ship<br>(0.33), Brand identity, Mission,<br>Vision (0.33), Brand purpose &<br>Product concept (0.33),<br>Differentiation (0.33)                                                               |
| <b>H</b> | Technological (1.00), Environmental<br>(1.00), Target audience (1.00),<br>Company & Brand (1.00),<br>Competitors (1.00), Brand identity,<br>Mission, Vision (1.00), Market<br>position (1.00), Competition (1.00),<br>Brand trust (1.00), Value proposition<br>(1.00), Status (1.00), Economic (0.90),<br>Political (0.90)                                                                 | Recognition & Relation-ship<br>(0.33)                                                                                                                                                                                                           |
| <b>I</b> | Technological (1.00), Target audience<br>(1.00), Company & Brand (1.00),<br>Products (1.00), Competitors (1.00),<br>Recognition & Relation-ship (1.00),<br>Brand identity, Mission, Vision<br>(1.00), Brand purpose & Product<br>concept (1.00), Competition (1.00),<br>Brand image (1.00), Brand equity<br>(1.00), Status (1.00), Price (1.00),<br>Environmental (0.90), Political (0.90) | Not identified                                                                                                                                                                                                                                  |
| <b>J</b> | Social & cultural (1.00), Economic<br>(1.00), Political (1.00), Market<br>position (1.00), Technological (0.90)                                                                                                                                                                                                                                                                            | Target audience (0.33), Company<br>& Brand (0.33), Team (0.33),<br>Recognition & Relation-ship<br>(0.33), Brand identity, Mission,<br>Vision (0.33), Brand trust (0.33),<br>Brand image (0.33), Brand equity<br>(0.33), Differentiation (0.33), |

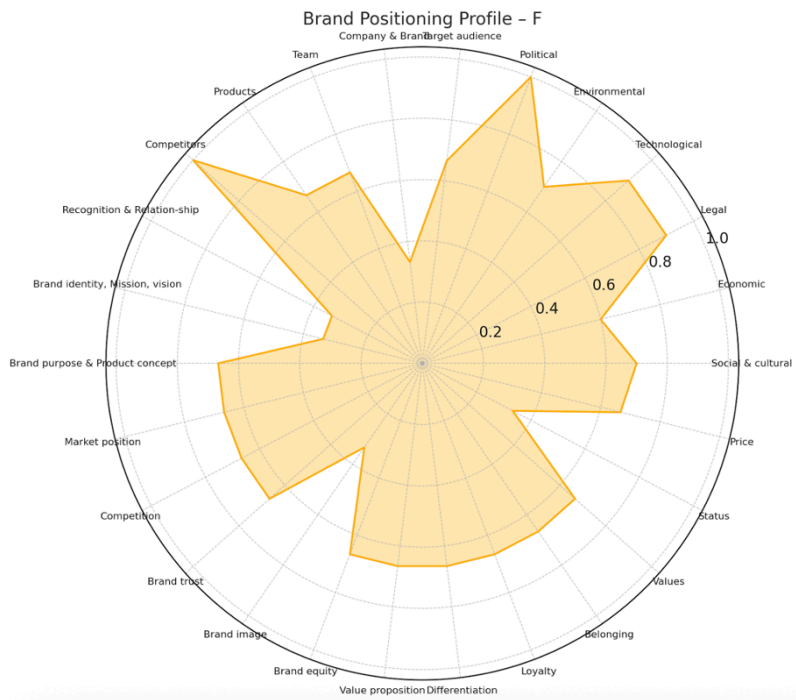
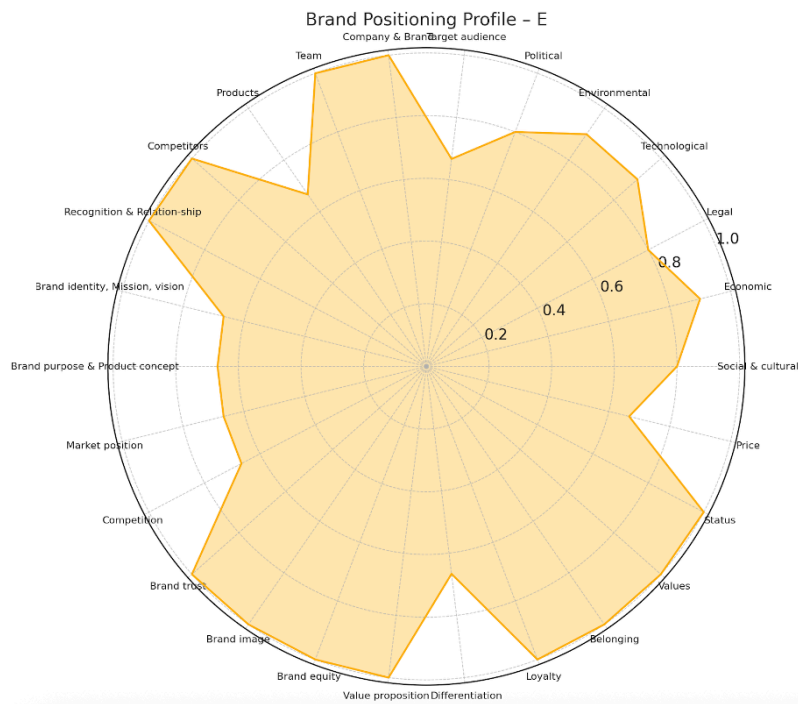


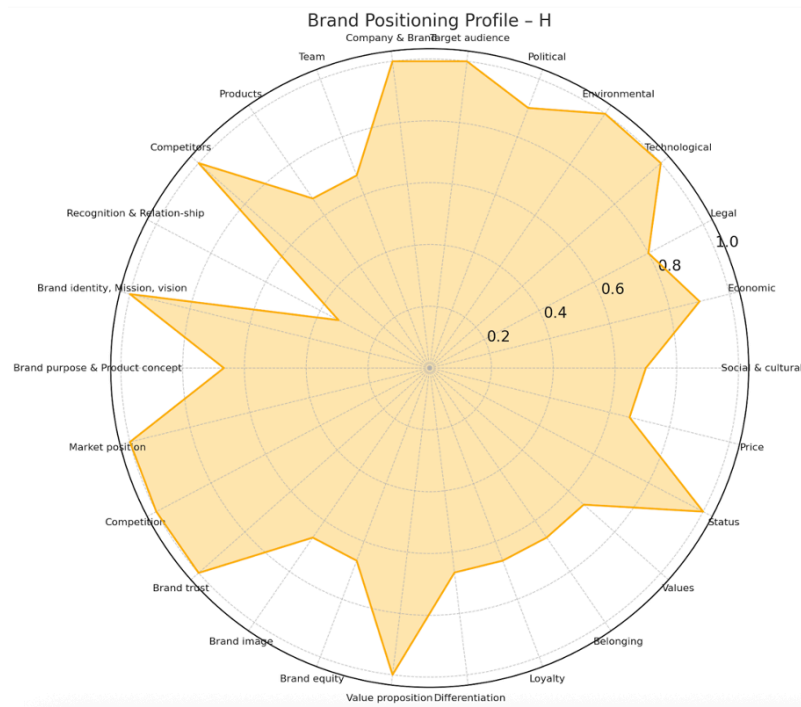
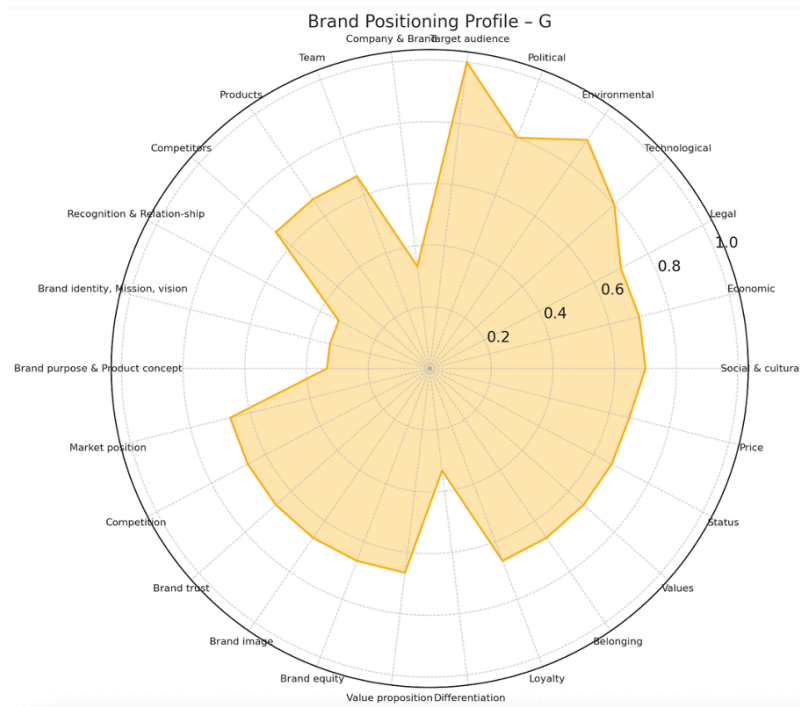
|          |                                                               |                                                                                                                                                                                                                         |
|----------|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |                                                               | Loyalty (0.33), Belonging (0.33), Status (0.33), Environmental (0.60)                                                                                                                                                   |
| <b>K</b> | Environmental (1.00), Values (1.00), Political (0.90)         | Team (0.33), Products (0.33), Competitors (0.33), Recognition & Relation-ship (0.33), Brand identity, Mission, Vision (0.33), Market position (0.33), Competition (0.33), Brand equity (0.33), Value proposition (0.33) |
| <b>L</b> | Competitors (1.00), Social & cultural (0.90), Economic (0.90) | Differentiation (0.33), Legal (0.60), Environmental (0.60)                                                                                                                                                              |
| <b>M</b> | Competitors (1.00), Economic (0.90), Technological (0.90)     | Not identified                                                                                                                                                                                                          |

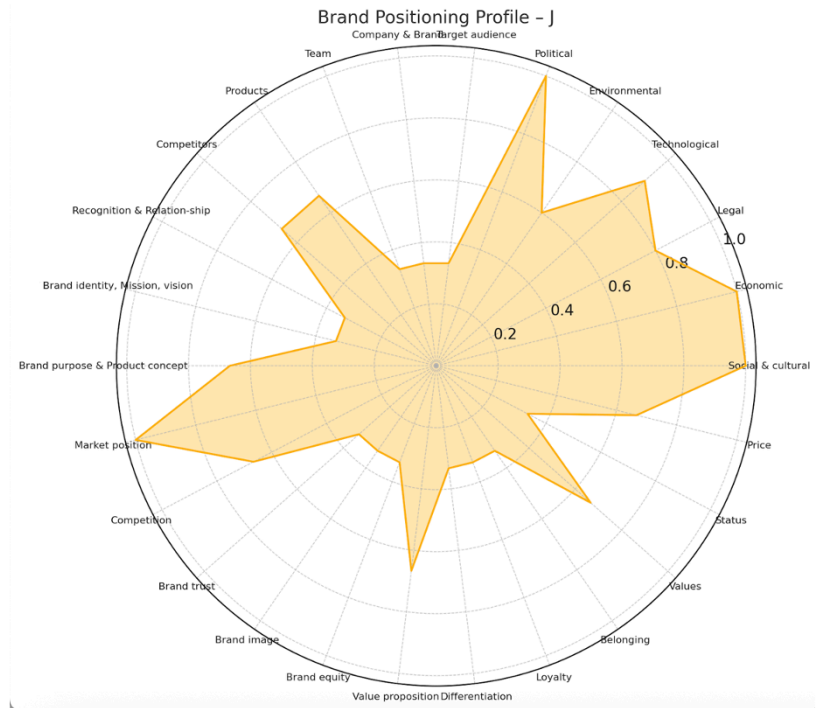
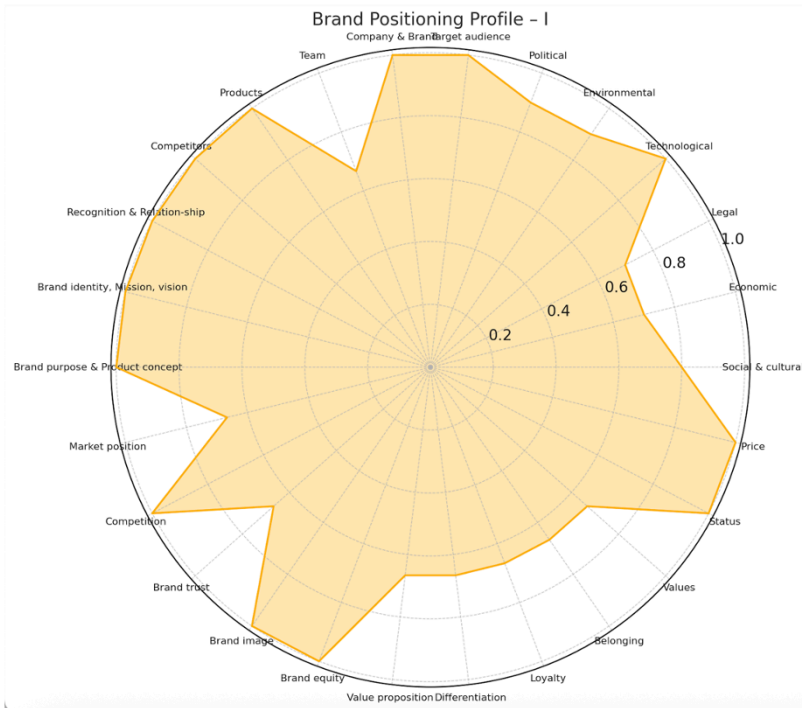
Interview results: radar chart profiles across organisations

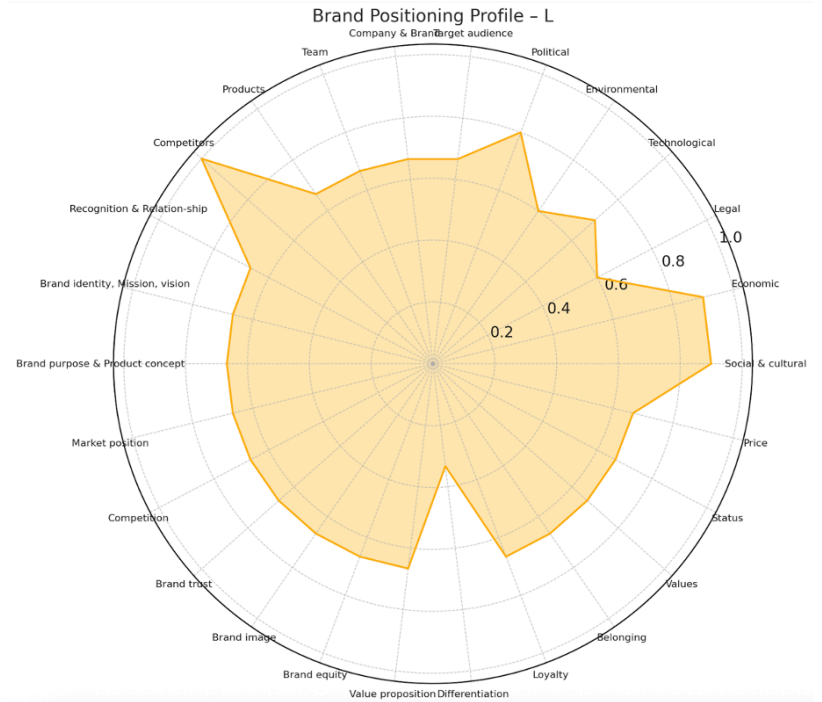
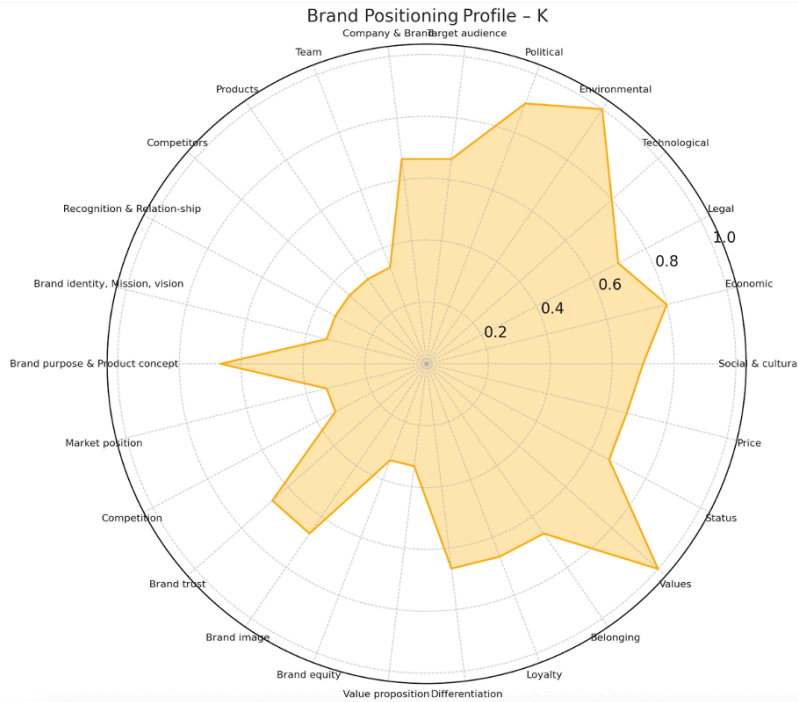


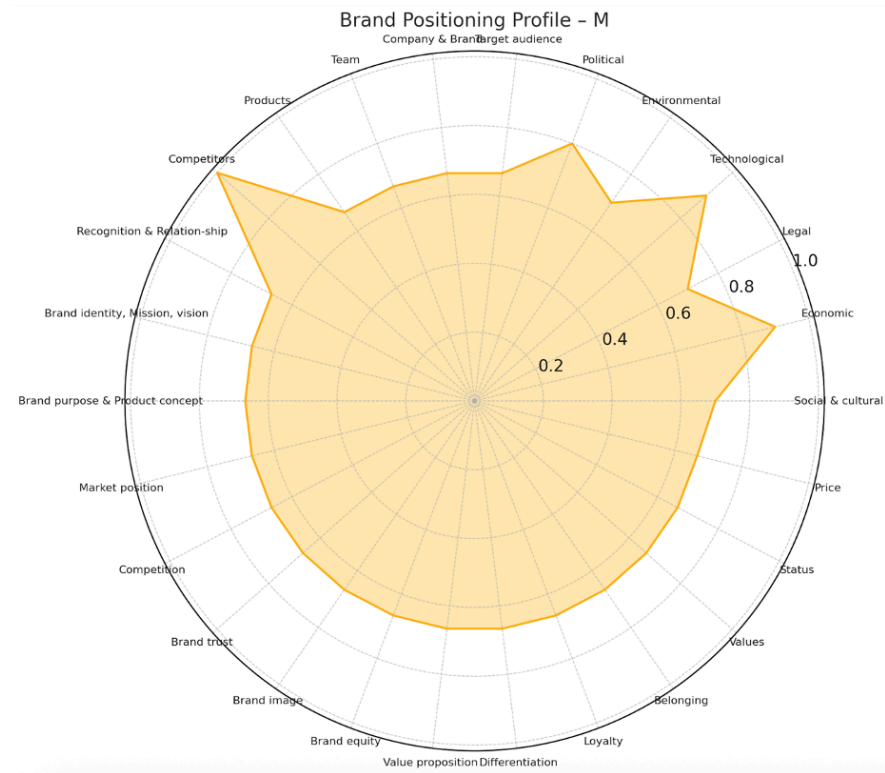














The roadmap for new product development  
(for the *Joy for Tails* brand) – a reflection of activities

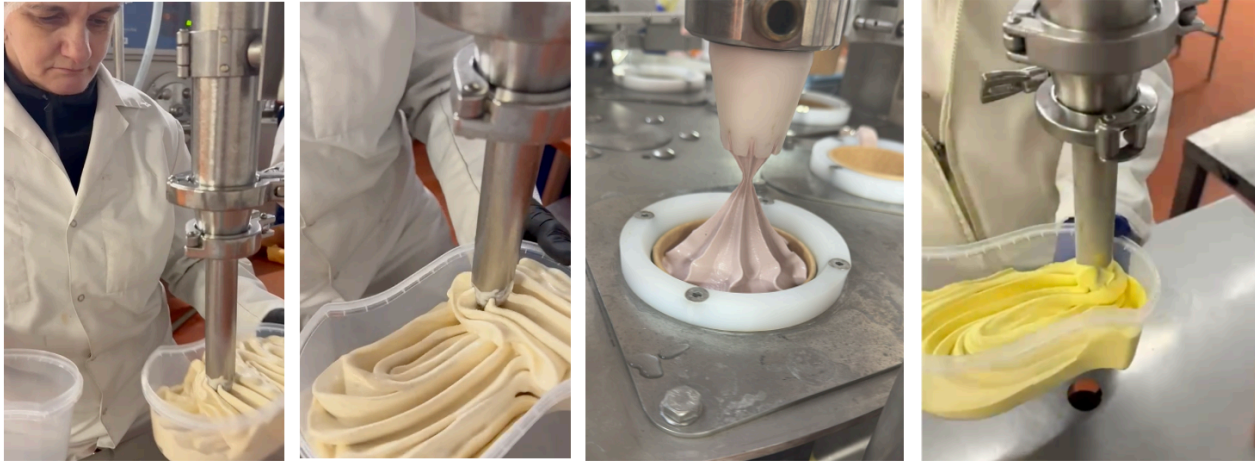
|                                                                                                                                                                                            |                                                                                                                                                                                                 |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                     |                                                                                                                                                                |                                                                                                                                                    |                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1.</p> <ul style="list-style-type: none"> <li>- 2 basic ice cream recipes identified</li> <li>- 2 prototypes for the product base created</li> </ul> <p>activities<br/>1.1. un 1.2.</p> | <p>2.</p> <ul style="list-style-type: none"> <li>- 3 product formulations with additives identified and developed</li> <li>- 3 prototypes created</li> </ul> <p>activities<br/>1.3. un 1.4.</p> | <p>3.</p> <ul style="list-style-type: none"> <li>- Adapted technology for ice cream recipe, defined customized packaging</li> <li>- Scaled 1 recipe, which is put forward for commercialization</li> </ul> <p>activities<br/>1.5. un 1.6.</p> | <p>4.</p> <ul style="list-style-type: none"> <li>- 2 functional ice cream base recipes with improved veterinary diet properties have been defined</li> <li>- 2 functional ice cream base prototypes have been created</li> </ul> <p>activities<br/>2.1. un 2.2.</p> | <p>5.</p> <ul style="list-style-type: none"> <li>- 4 recipes for functional ice cream with additives have been identified.</li> </ul> <p>activity<br/>2.3.</p> | <p>6.</p> <ul style="list-style-type: none"> <li>- 4 prototypes for products with additives have been created.</li> </ul> <p>activity<br/>2.4.</p> | <p>7.</p> <ul style="list-style-type: none"> <li>- Scaled and commercialized 2 formulations for functional products with improved veterinary dietary properties</li> </ul> <p>activity<br/>2.5.</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Prototype development, pilot scaling in the production environment, and testing (*Joy for Tails*)

1. Prototyping results: illustrative examples



2. Pilot-scale implementation and testing in the production environment:

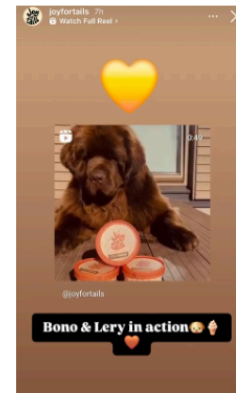
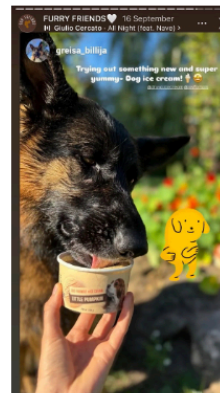
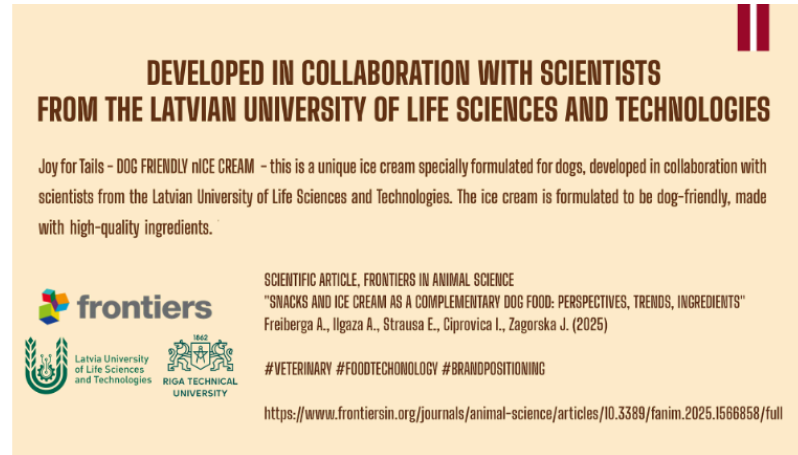


3. The testing process:





Examples of marketing and visual brand communication materials for *Joy for Tails*





## Validation of hypotheses: survey questions and results

| Respondent No. | Respondent's age | Respondent's gender (Male = 1, Female = 2) | Position level (1 – Owner; 2 – Top executive; C – Other) | Residence (1 – Capital; 2 – Outside the capital) | Industry      | Export | 1) Does your company have a clear understanding of its BP (market position, target audience, identity, image, brand uniqueness, etc.)? | 2) To what extent does the organisation's BP affect its performance? | 3) To what extent does BP affect the company's sustainability and long-term growth? | 4) To what extent does BP support and contribute to the development of the company's SM? | 5) To what extent does the organisation's SM approach influence how BP contributes to company results? | 6) To what extent do SM processes that integrate BP affect the company's performance? | 7) To what extent do SM processes that integrate BP affect the company's sustainability in the long term? | 8) Do you agree that BP or its elements should be included in the company's SM in order to achieve better results? | 9) To what extent does management involvement (managers) contribute to strengthening the relationship between strategic BP and organisational results? |
|----------------|------------------|--------------------------------------------|----------------------------------------------------------|--------------------------------------------------|---------------|--------|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | 49               | 1                                          | 1                                                        | 1                                                | Manufacturing | yes    | 1                                                                                                                                      | 5                                                                    | 5                                                                                   | 5                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 2              | 41               | 2                                          | 2                                                        | 1                                                | Marketing     | yes    | 1                                                                                                                                      | 5                                                                    | 5                                                                                   | 5                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 4                                                                                                                                                      |
| 3              | 35               | 2                                          | 2                                                        | 1                                                | Manufacturing | yes    | 2                                                                                                                                      | 5                                                                    | 5                                                                                   | 3                                                                                        | 1                                                                                                      | 4                                                                                     | 4                                                                                                         | 1                                                                                                                  | 4                                                                                                                                                      |
| 4              | 36               | 1                                          | 1                                                        | 1                                                | Technology    | no     | 2                                                                                                                                      | 4                                                                    | 5                                                                                   | 4                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 5              | 44               | 2                                          | 1                                                        | 1                                                | Finances      | yes    | 3                                                                                                                                      | 3                                                                    | 4                                                                                   | 4                                                                                        | 1                                                                                                      | 4                                                                                     | 4                                                                                                         | 2                                                                                                                  | 5                                                                                                                                                      |
| 6              | 44               | 2                                          | 1                                                        | 1                                                | Manufacturing | no     | 1                                                                                                                                      | 5                                                                    | 5                                                                                   | 4                                                                                        | 1                                                                                                      | 4                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 7              | 44               | 2                                          | 1                                                        | 2                                                | Accounting    | no     | 3                                                                                                                                      | 3                                                                    | 3                                                                                   | 3                                                                                        | 2                                                                                                      | 0                                                                                     | 0                                                                                                         | 2                                                                                                                  | 3                                                                                                                                                      |
| 8              | 30               | 2                                          | 1                                                        | 2                                                | Education     | yes    | 2                                                                                                                                      | 5                                                                    | 4                                                                                   | 5                                                                                        | 1                                                                                                      | 4                                                                                     | 5                                                                                                         | 2                                                                                                                  | 5                                                                                                                                                      |
| 9              | 42               | 2                                          | 2                                                        | 1                                                | Manufacturing | yes    | 2                                                                                                                                      | 5                                                                    | 5                                                                                   | 5                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 10             | 61               | 1                                          | 2                                                        | 2                                                | Agriculture   | no     | 2                                                                                                                                      | 4                                                                    | 4                                                                                   | 5                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 11             | 48               | 1                                          | 1                                                        | 2                                                | Beauty care   | yes    | 1                                                                                                                                      | 4                                                                    | 4                                                                                   | 4                                                                                        | 1                                                                                                      | 4                                                                                     | 4                                                                                                         | 1                                                                                                                  | 4                                                                                                                                                      |
| 12             | 51               | 1                                          | 1                                                        | 1                                                | Education     | no     | 1                                                                                                                                      | 3                                                                    | 4                                                                                   | 3                                                                                        | 1                                                                                                      | 4                                                                                     | 4                                                                                                         | 2                                                                                                                  | 4                                                                                                                                                      |
| 13             | 44               | 2                                          | 1                                                        | 2                                                | Construction  | yes    | 2                                                                                                                                      | 3                                                                    | 5                                                                                   | 4                                                                                        | 1                                                                                                      | 4                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |
| 14             | 49               | 2                                          | 2                                                        | 1                                                | Trade         | yes    | 1                                                                                                                                      | 5                                                                    | 5                                                                                   | 5                                                                                        | 1                                                                                                      | 5                                                                                     | 5                                                                                                         | 1                                                                                                                  | 5                                                                                                                                                      |



**Evita Štrausa** was born in 1980 in Tukums, Latvia. She holds a professional qualification in Social Psychology from the University of Latvia (2002) and an MBA in Innovation and Entrepreneurship from Riga Technical University (2015), she is included in the RTU Golden Fund.

She is currently a company executive and a researcher specialising in strategic brand management and new product development. Since 2024, Evita has been the CEO and a Board Member of Tērvete Food Ltd, leading the development of innovative products, export development, and operational efficiency. Her professional background includes a significant contribution to the development of brands such as "MILZU!" and "Joy for Tails" (later – "Joy for Friends"), as well as many years in leadership positions within the telecommunications industry (Tele2). Evita is also an active business lecturer and mentor, guiding companies in creating value-based brands and navigating global market entry.

Her scientific interests are centred on a holistic approach to brand positioning, strategic management, and new product development, with a focus on bridging the gap between academic research and practical business excellence.