

# 西方品牌理论演化研究

## Study on the Evolution of Foreign Brand Theory

### 一、研究背景及研究对象

1950 年,世界著名广告大师 Ogilvy 首次提出了“品牌”这个概念。品牌在学术上的第一篇奠基性文献是 Gardner 和 Levy 于 1955 年在 Harvard Business Review 上发表的论文 The Product and the Brand,至此拉开了品牌科学研究的序幕。<sup>[1]</sup>而品牌的学术研究真正起步应该是在 20 世纪 80 年代末,大量学者开始从各个不同的角度切入品牌领域的研究,如品牌形象 (Park et al 1986) <sup>[2]</sup>, 品牌延伸 (Aaker & Keller 1990) <sup>[3]</sup>, 品牌资产 (Keller 1993) <sup>[4]</sup>, 品牌人格 (Aaker J. 1997) <sup>[5]</sup>, 品牌关系 (Fournier 1998) <sup>[6]</sup>, 品牌社群 (Muniz et al 2001) <sup>[7]</sup>, 品牌依附 (Park et al 2010) <sup>[8]</sup>, 品牌崇拜 (Batra et al 2010) <sup>[9]</sup>, 品牌浸合 (Hollebeek 2014) <sup>[10]</sup> 等等,而本文正是以此为基础开展的研究。

如果以研究对象为标准,可以将品牌科学的研究划分为两类:一是以品牌活动为对象的研究,二是以品牌理论为对象的研究。此研究计划以品牌理论为研究对象,理论文献主要来源于 Web of Science 核心数据库,引入知识图谱的研究方法,以及范式理论与三维结构理论为基本框架的内容分析研究方法。旨在系统地梳理西方品牌理论发展的知识结构与体系,以及探索西方品牌理论发展的内在规律。

### 二、文献回顾

国外学者对于该领域的文献综述类的文章,主要是选择某一切片进行系统性的文献回顾,如 (Christodoulides et al 2010) 对“基于消费者的品牌资产”的文献进行了概念和实证上的梳理,并对其测量方式做出了回顾并提出结论。<sup>[11]</sup> (Plumeyer et al 2019) 选择 1991 年至 2016 年的品牌形象相关的 224 篇学术文章进行了系统性的文献回顾,并就品牌形象测量方式的选择提供了相关路径。<sup>[12]</sup> (Radler et al 2018) 应用了元分析的方法对过往 20 年的品牌人格方面的 220 篇研究进行了文献分析,并且发现了 5 个该研究方向的聚类:品牌人格测量、品牌人格的直接/间接影响、品牌人格维度的发展动力、品牌人格在品牌延伸中的作用以及在其他相关领域的应用,并在研究的基础上提出一个跨学科的品牌人格研究框架。<sup>[13]</sup>

国内学者对于品牌理论本身的梳理工作相对滞后,大多为现有理论基础之上的实证研究。但也存在一些较为优秀的学位论文及专著,如 2013 年张锐的博士论文《基于知识图谱的中国品牌理论演进研究》<sup>[1]</sup>,非常系统的梳理了一般品牌学的体系,但是对于更深层次的方法论上的探索有所不足;2020 年卢泰宏教授出版的《品牌思想简史》<sup>[14]</sup>也是在时间线上对于品牌的相关研究做了梳理,对于思想层次的探索也没有很细致。

如上所述,目前国内外的学者尚未尝试从更为宏观的维度上来探讨品牌理论本身的演化历程,得益于现代计算机技术的发展(更加细致的文献计量分析)与系统性文献回顾方法的改进,本研究尝试依此来展开。

### 三、研究方法

本研究计划采用文献计量分析与内容分析。

#### (一) 文献计量分析

文献计量分析可以帮助快速了解该领域的历史和前沿,通过文献计量分析可以得到该研究领域重要的历史文献,然后通过对这些文献的内容进行系统性的分析可以梳理出该研究领域的发展路径。

(Zupic & Cater 2015) 提出了标准的文献计量分析流程,包括:研究设计、数据收集、数据分析、数据可视化与结果阐释。<sup>[15]</sup>本文将按照这 5 个步骤进行研究方法的阐述:

## 1. 研究设计

研究设计这一步主要需要提出问题，并且根据提出的问题来选择合适的工具。本文主要回答以下几个问题：（1）品牌研究学术领域的重要作者与重要作者有哪些？（2）品牌研究的概念结构有什么特点？（3）品牌研究的基础知识，知识结构与研究脉络是如何呈现的？本研究主要采用 Aria 博士基于 R 语言开发的 Biblioshiny 软件，可用于全流程的科学文献计量与可视化分析（Aria & Cuccurullo 2017）。<sup>[16]</sup>

## 2. 数据收集

本研究的数据采集自 Web of Science Core Collection 数据库。以“Title: (brand), Language: (English), Document Types: (article OR review), Timespan: 1955-2019”为条件进行检索，共得到 11563 篇文献，并将结果保存为 txt.文件格式。

## 3. 数据分析

本研究主要用到的描述性统计分析，关键词共现分析，文献共被引分析以及历史直接引文网络分析。描述性统计分析主要针对

## 4. 数据可视化

本研究主要的可视化方法有频数分布直方图、树图、（关键词）共现网络图、（文献）共引网络图、（文献）历史直接引文网络图。

## 5. 结果阐释

本研究的结果主要分为三个部分进行阐述：第一部分为该研究领域的基本信息，第二部分为关键词分析，主要展示品牌研究的概念结构；第三部分为文献分析，主要展示知识基础、知识结构与研究脉络。结尾部分将讨论该研究领域的现状及趋势。

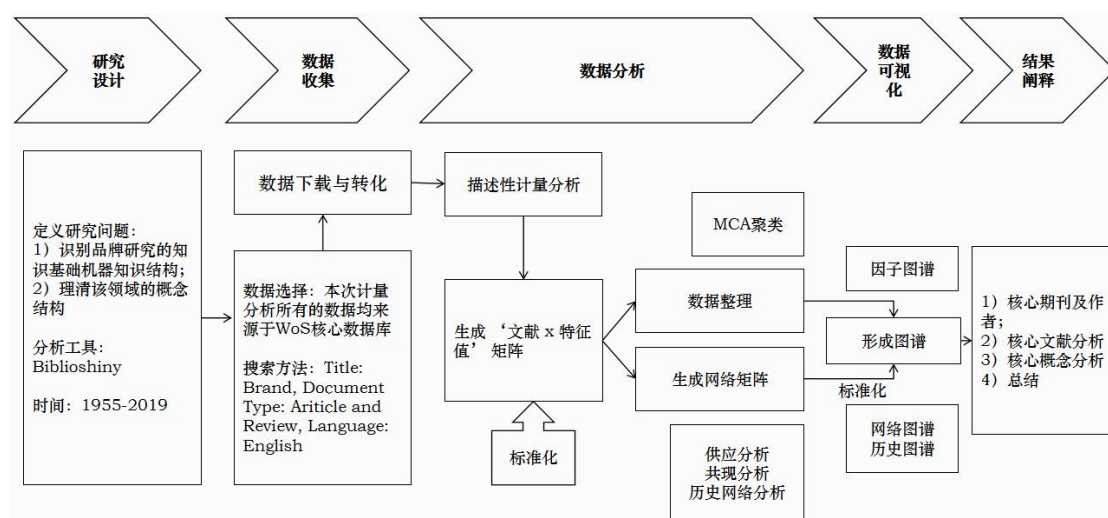


图 1：文献计量分析流程

## （二）内容分析

本研究的内容分析框架主要参考库恩的范式理论，以及霍尔的三维结构理论来进行资料的整理。首先，依据库恩的范式理论，将品牌研究分为以下几个阶段：品牌学前学科时期——品牌学范式形成期——品牌学范式革命期——品牌学范式发展期——形成中的品牌学新范式，每一时期的品牌学范式都将从品牌学理论范式和研究范式（方法论）两个方面来进行阐释。其次，依据霍尔的三维结构理论——时间维、逻辑维和知识维——来进行文献的整理与组织。时间维主要是指范式演化过程中社会背景的发展与变化；知识维主要是品牌学在当时社会背景下的知识条件，如相关社会科学与自然科学等的知识基础；逻辑维主要是指品牌思想演变的底层逻辑。主要框架如下图所示：

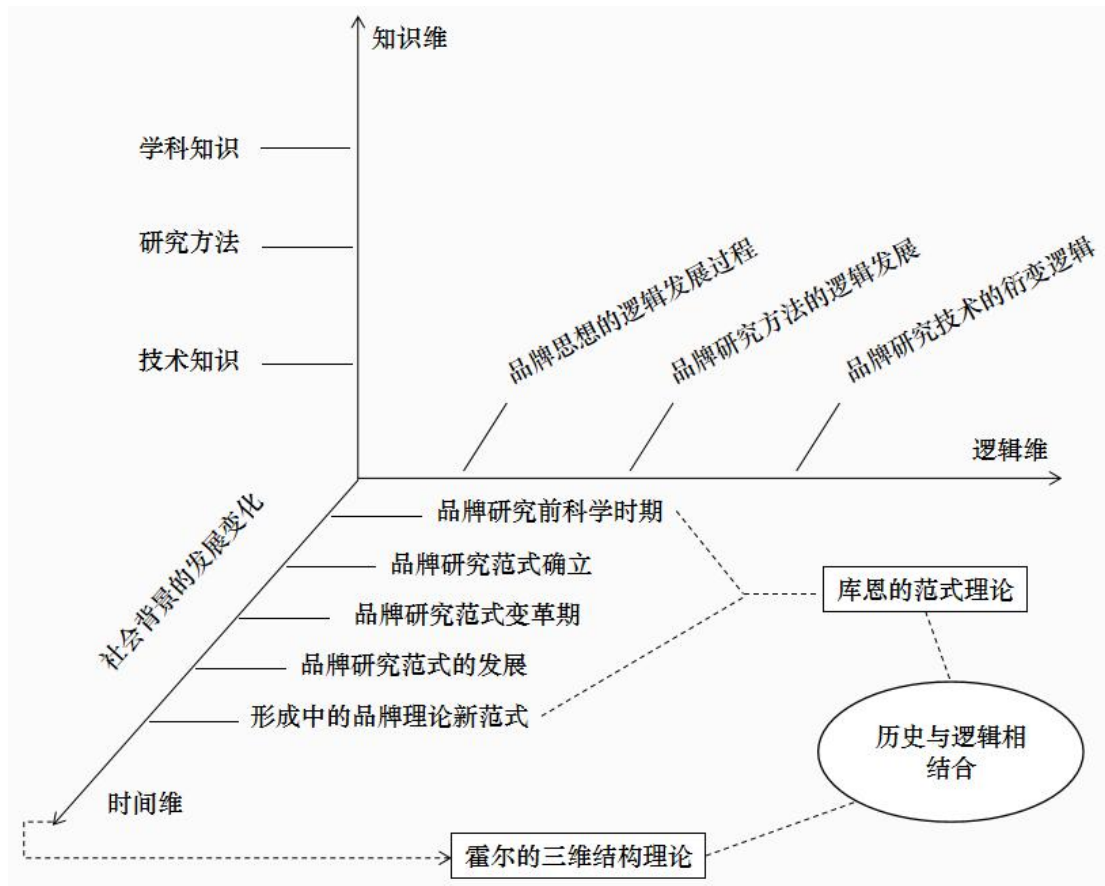


图 2：内容分析框架（参考胡维平广告学范式研究）<sup>[17]</sup>

#### 四、研究意义及其局限

我国品牌研究的发展过程，其实是起步于对于西方品牌理论的直接导入、随后才慢慢发展的过程。尽管近年来研究发展十分迅速，但更多的是对品牌实践活动相关议题，以及对于理论的实证研究。对于该研究领域的研究内容、研究工具、理论范式等问题上的研究，存在着不足之处。本研究从更为宏观的角度切入，尝试在系统性文献研究的基础之上，更加深入地探索品牌思想的演化历程。一是提供给相关学者一个更加宽阔的视角，填补这一研究领域的空白；二是对于相关从业者而言，理论体系的建构也能更好地指导品牌的实践活动。

文献计量分析实质也是建立在“联系”的基础之上，最直接的表现便是引用数量，这样势必会对一些新兴的以及较为小众的议题有所疏漏。而内容分析的框架受限于笔者精力，肯定无法尽善尽美，只能通过工具筛选出的关键文献进行深入研究。但就目前而言，这也是最为适合本研究的研究方法。

#### 五、部分关键文献梳理

##### （一）基于共引网络分析得到的 50 篇论文

Author	Year	Article	DOI
Park CW	1986	Strategic brand concept-image management	10.2307/1251291
Zeithaml VA	1988	Consumer perceptions of price, quality, and value - a means-end model and synthesis of evidence	10.2307/1251446
Aaker DA	1990	Consumer evaluations of brand extensions	10.2307/1252171
Aaker DA	1991	Managing brand equity [M]	

Keller KL	1993	Conceptualizing, measuring, and managing customer-based brand equity	10.2307/1252054
Aaker DA	1996	Measuring brand equity across products and markets	10.2307/41165845
Aaker DA	1996	Building strong brand [M]	
Erdem T	1998	An empirical analysis of umbrella branding	10.1207/S15327663J CP0702_02
Keller KL	1998	Strategic brand management [M]	
Yoo B	2000	An examination of selected marketing mix elements and brand equity	10.1177/00920703002 82002
Berry LL	2000	Cultivating service brand equity	10.1177/00920703002 81012
Yoo B	2001	Developing and validating a multidimensional consumer-based brand equity scale	10.1016/S0148-2963( 99)00098-3
Keller KL	2003	Brand synthesis: The multidimensionality of brand knowledge	10.1086/346254
Keller KL	2003	Strategic brand management [M]	
Keller KL	2006	Brands and branding: Research findings and future priorities	10.1287/mksc.1050.0 153
Fishbein M	1975	Belief attitude inte [M]	
Nunnally JC	1978	Intro psychol measur [M]	
Churchill GA	1979	A paradigm for developing better measures of marketing constructs	10.2307/3150876
Fornell C	1981	Evaluating Structural Equation Models with Unobservable Variables and Measurement Error	10.2307/3151312
Baron RM	1986	The moderator mediator variable distinction in social psychological-research - conceptual, strategic, and statistical considerations	10.1037/0022-3514.51 .6.1173
Anderson JC	1988	Structural equation modeling in practice - a review and recommended 2-step approach	10.1037/0033-2909.10 3.3.411
Bagozzi RP	1988	On the evaluation of structural equation models	10.1287/mksc.7.1.99
Morgan RM	1994	The commitment-trust theory of relationship marketing	10.2307/1252308
Gale Heard	1994	Customer loyalty: Toward an integrated conceptual framework	10.1177/00920703942 22001
Zeithaml VA	1996	The behavioral consequences of service quality	10.2307/1251929
Hair JF	1998	Multivariate data [M]	
Oliver RL	1999	Whence consumer loyalty?	10.2307/1252099
Hu LT	1999	Cutoff Criteria for Fit Indexes in Covariance Structure Analysis: Conventional Criteria Versus New Alternatives	10.1080/10705519909 540118
Chaudhuri A	2001	The chain of effects from brand trust and brand affect to brand performance: The role of brand loyalty	10.1509/jmkg.65.2.81. 18255
Podsakoff PM	2003	Common method biases in behavioral research: A critical review of the literature and recommended remedies	10.1037/0021-9010.88 .5.879
Hair JF	2006	Multivariate data [M]	

Hair JF	2010	Multivariate data [M]	
Sirgy MJ	1982	Self-Concept in Consumer Behavior: A Critical Review	10.1086/208924
Belk RW	1988	Possessions and the Extended Self	10.1086/209154
Aaker JL	1997	Dimensions of brand personality	10.2307/3151897
Fournier S	1998	Consumers and their brands: Developing relationship theory in consumer research	10.1086/209515
Muniz AM	2001	Brand community	10.1086/319618
Mcalexander JH	2002	Building brand community	10.1509/jmkg.66.1.38.18451
Bhattacharya CB	2003	Consumer-company identification: A framework for understanding consumers' relationships with companies	10.1509/jmkg.67.2.76.18609
Vargo SL	2004	Evolving to a new dominant logic for marketing	10.1509/jmkg.68.1.1.24036
Aaker JL	2004	When good brands do bad	10.1086/383419
Algesheimer R	2005	The social influence of brand community: Evidence from European car clubs	10.1509/jmkg.69.3.19.66363
Thomson M	2005	The ties that bind: Measuring the strength of consumers' emotional attachments to brands	10.1207/s15327663jcp1501_10
Escalas JE	2005	Self-Construal, Reference Groups, and Brand Meaning	10.1086/497549
Carroll BA	2006	Some antecedents and outcomes of brand love	10.1007/s11002-006-4219-2
Brakus JJ	2009	Brand experience: what is it? How is it measured? Does it affect loyalty?	10.1509/jmkg.73.3.52
Schau HJ	2009	How brand community practices create value	10.1509/jmkg.73.5.30
Park CW	2010	Brand Attachment and Brand Attitude Strength: Conceptual and Empirical Differentiation of Two Critical Brand Equity Drivers	10.1509/jmkg.74.6.1
Batra R	2012	Brand love	10.1509/jm.09.0339
Brodie RJ	2013	Consumer engagement in a virtual brand community: An exploratory analysis	10.1016/j.jbusres.2011.07.029

## (二) 基于历史直引网络分析得到的 50 篇论文

Author	Paper	DOI	Year	LCS	GCS
Park CW	Strategic Brand Concept-Image Management	10.2307/1251291	1986	329	846
Aaker DA	Consumer Evaluations of Brand Extensions	10.2307/1252171	1990	531	1276
Park CW	Evaluation of Brand Extensions - The Role of Product Feature Similarity and Brand Concept Consistency	10.1086/209251	1991	280	588
Dodds WB	Effects of Price, Brand, And Store Information on Buyers Product Evaluations	10.2307/3172866	1991	226	2120
Boush DM	A Process-Tracing Study of Brand Extension Evaluation	10.2307/3172723	1991	216	422
Keller KL	The Effects of Sequential Introduction of Brand Extensions	10.2307/3172491	1992	242	561
Simon CJ	The Measurement and Determinants of Brand Equity - A Financial Approach	10.1287/mksc.12.1.28	1993	194	496
Loken B	Diluting Brand Beliefs - When Do Brand Extensions Have A Negative Impact	10.2307/1251855	1993	206	389

Keller KL	Conceptualizing, Measuring, and Managing Customer-Based Brand Equity	10.2307/1252054	1993	1774	4749
Broniarczyk SM	The Importance of The Brand in Brand Extension	10.2307/3152195	1994	225	466
Park CS	A Survey-Based Method for Measuring and Understanding Brand Equity and Its Extendibility	10.2307/3152199	1994	180	368
Cobbwalgren CJ	Brand Equity, Brand Preference, and Purchase Intent	10.1080/00913367.1995.10673481	1995	206	454
Park CW	Composite Branding Alliances: An Investigation of Extension and Feedback Effects	10.2307/3152216	1996	139	306
Aaker DA	Measuring Brand Equity Across Products and Markets	10.2307/41165845	1996	425	999
Aaker JL	Dimensions of Brand Personality	10.2307/3151897	1997	850	2362
Fournier S	Consumers and Their Brands: Developing Relationship Theory in Consumer Research	10.1086/209515	1998	1006	2878
Simonin BL	Is A Company Known by the Company It Keeps? Assessing the Spillover Effects of Brand Alliances on Consumer Brand Attitudes	10.1177/002224379803500105	1998	208	554
Rao AR	Signaling Unobservable Product Quality Through A Brand Ally	10.2307/3152097	1999	144	427
Berry LL	Cultivating Service Brand Equity	10.1177/0092070300281012	2000	283	681
Yoo B	An Examination of Selected Marketing Mix Elements and Brand Equity	10.1177/0092070300282002	2000	431	1069
Batra R	Effects of Brand Local and Nonlocal Origin on Consumer Attitudes in Developing Countries	10.1207/s15327663jcp0902_3	2000	153	555
Aaker JL	Consumption Symbols as Carriers of Culture: A Study of Japanese And Spanish Brand Personality Constructs	10.1037//0022-3514.81.3.492	2001	171	413
Yoo B	Developing and Validating A Multidimensional Consumer-Based Brand Equity Scale	10.1016/s0148-2963(99)00098-3	2001	436	979
Chaudhuri A	The Chain of Effects from Brand Trust And Brand Affect To Brand Performance: The Role Of Brand Loyalty	10.1509/jmkg.65.2.81.18255	2001	609	1982
Muniz AM	Brand Community	10.1086/319618	2001	553	2214
Holt DB	Why Do Brands Cause Trouble? A Dialectical Theory of Consumer Culture and Branding	10.1086/339922	2002	205	876
Mcalexander JH	Building Brand Community	10.1509/jmkg.66.1.38.18451	2002	346	1135
Ailawadi KL	Revenue Premium as An Outcome Measure of Brand Equity	10.1509/jmkg.67.4.1.18688	2003	181	375
Brown S	Teaching Old Brands New Tricks: Retro Branding and The Revival of Brand Meaning	10.1509/jmkg.67.3.19.18657	2003	175	543
Escalas JE	You Are What They Eat: The Influence of Reference Groups on Consumers' Connections to Brands	10.1207/s15327663jcp1303_06	2003	217	640

Steenkamp Jbem	How Perceived Brand Globalness Creates Brand Value	10.1057/palgrave .jibs.8400002	2003	172	474
Aaker J	When Good Brands Do Bad	10.1086/383419	2004	245	614
Netemeyer RG	Developing and Validating Measures of Facets Of Customer-Based Brand Equity	10.1016/s0148-2 963(01)00303-4	2004	194	447
Escalas JE	Self-Construal, Reference Groups, And Brand Meaning	10.1086/497549	2005	257	726
Algesheim er R	The Social Influence of Brand Community: Evidence from European Car Clubs	10.1509/jmkg.69 .3.19.66363	2005	320	1015
Muniz AM	Religiosity in The Abandoned Apple Newton Brand Community	10.1086/426607	2005	138	490
Thomson M	The Ties That Bind: Measuring the Strength of Consumers' Emotional Attachments to Brands	10.1207/s153276 63jcp1501_10	2005	356	899
Keller KL	Brands and Branding: Research Findings and Future Priorities	10.1287/mksc.10 50.0153	2006	387	809
Carroll BA	Some Antecedents and Outcomes of Brand Love	10.1007/s11002- 006-4219-2	2006	263	614
Bagozzi RP	Antecedents and Purchase Consequences of Customer Participation in Small Group Brand Communities	10.1016/j.ijresma r.2006.01.005	2006	155	539
Erdem T	Brands as Signals: A Cross-Country Validation Study	10.1509/jmkg.20 06.70.1.34	2006	146	371
Konecnik M	Customer-Based Brand Equity for A Destination	10.1016/j.annals. 2006.10.005	2007	133	331
Schau HJ	How Brand Community Practices Create Value	10.1509/jmkg.73 .5.30	2009	267	1008
Brakus JJ	Brand Experience: What Is It? How Is It Measured? Does It Affect Loyalty?	10.1509/jmkg.73 .3.52	2009	383	1220
Boo S	A Model of Customer-Based Brand Equity and Its Application to Multiple Destinations	10.1016/j.tourma n.2008.06.003	2009	133	270
Park CW	Brand Attachment and Brand Attitude Strength: Conceptual and Empirical Differentiation of Two Critical Brand Equity Drivers	10.1509/jmkg.74 .6.1	2010	295	699
Malar L	Emotional Brand Attachment and Brand Personality: The Relative Importance of The Actual and The Ideal Self	10.1509/jmkg.75 .4.35	2011	191	422
Batra R	Brand Love	10.1509/jm.09.0 339	2012	262	551
Brodie RJ	Consumer Engagement in A Virtual Brand Community: An Exploratory Analysis	10.1016/j.jbusres .2011.07.029	2013	217	867
Hollebeek LD	Consumer Brand Engagement in Social Media Conceptualization, Scale Development and Validation	10.1016/j.intmar. 2013.12.002	2014	164	658

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