Case Study: Consumer Umbrella Brand Management

1. Identifying the issue

A client in the specialty cleaners market needed assistance in refining its overall brand architecture. Over the decades the client’s portfolio of products had grown primarily through acquisitions. After acquisitions the client had typically maintained the acquired brand’s identity. This eventually led to a diverse portfolio of products with loyal customer bases but little synergy between products.

The client felt it could better manage its product lines and increase sales by extending its most well known brand into an overall umbrella brand and bringing the various product lines under that umbrella. While this strategy made intuitive sense the client was aware that many of its individual brands had considerable brand equity. The client worried that customers of these brands my try a competitor’s product if they did not see the familiar packaging of their preferred brand on the shelf. The client had developed a series of packaging design prototypes for the new umbrella strategy but remained uncertain as to which design to use, or even if it should proceed with the umbrella strategy at all.

2. Research approach

Based on the client’s needs, Isurus recommended a quantitative approach, specifically online surveys. The key advantage of the online survey approach was that we were able to create a virtual store shelf and place the new umbrella designs next to competitive products to see what customers would purchase.

The survey included questions about the consumer’s shopping habits and preferred brands. This enabled an analysis of their selections and the degree to which they recognized their preferred brand on the shelf and the degree to which the change in branding resulted in trials of competitive brands.

Using an online survey helped control costs while providing a robust number of data points which allowed the data to be analyzed at the product level and for multiple packaging designs to be tested. The survey design was developed in conjunction with the client.

3. Analysis and reporting

Isurus’ analysis of the data produced three key insights.

- The brand equity of umbrella brand was both strong enough and broad enough to encompass the client’s wide portfolio of products.
- The combination of the umbrella brand logo and individual brand design elements did not confuse customers – they still recognized and selected their preferred brands.
- It identified the packaging design scheme (color, logo size, etc.) that appealed most to consumers.

Isurus delivered the data, conclusions and recommendations in a report, followed by a presentation to the project team and series of ongoing consultation calls on the use of the data.

4. Actions taken

The client relied on the research to give it confidence that it could move forward with the umbrella strategy without jeopardizing the loyal customers of the individual brands. The research also helped resolve an internal debate regarding which new design scheme would appeal most to customers.