

Brand Archetypes

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Abstract

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Brand archetypes are a steadily growing but relatively unstudied operationalization of brand persona. This dissertation consists of three papers that examine the current use and potential of brand archetype-driven personas. Chapter One reviews archetypes' use in branding and empirically examines the archetypal model put forth by Mark and Pearson (2001). Based on consumer perceptions, I propose a refined classification of the twelve archetypes around four new clusters. Chapter Two finds archetype match as an untested predictor of cause-brand fit. Archetype-based cause-brand fit influences consumer responses to cause-brand alliances by increasing perceived authenticity. Finally, Chapter Three posits brand archetypes are an untested predictor of brand extension success. Even when an extension has no obvious fit (e.g., technical expertise), archetype match effectively predicts brand extension success and purchase intentions.

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CHAPTER 1. BRAND ARCHETYPE-DRIVEN PERSONAS

A company's brand is one of its most crucial assets, allowing it to charge premium prices, enjoy greater customer loyalty, and successfully extend product lines. The cornerstone of a strong brand is a cohesive and clear brand identity that signals the brand's values and differentiates it from competitors (Aaker 1991). As the brand changes over time, its core identity, or brand essence, serves as a stable compass that provides sustainability, uniqueness, and value (Aaker 1996). The core identity is complemented by an extended identity that includes visual and personality elements and which adds texture to the brand in various ways.

Companies typically implement extended identities using brand personas. An anthropomorphized character, such as the Brawny lumberjack, for example, conveys the brand's "toughness" or "ruggedness." Such brand personas can be constructed from individual brand personality dimensions or built from an overarching brand archetype. Archetypes are forms or images that exist in the collective unconscious (i.e., they are understood by all of humanity) and serve as organizing principles for things people see and do (Campbell 1949; Jung 1938). Archetypes thus supply a framework around which to build a brand.

Building a persona from a specific archetype has several benefits. First, although some product categories are associated with broad archetypes (the beauty category is associated with the Lover archetype and the candy category with the Jester archetype (Roberts 2010)), brands can embrace unique archetypes to differentiate themselves from within-category competitors (Cowen 2007). For example, within the automobile industry, Jeep embodies the Explorer archetype, Mercedes-Benz embodies the Ruler, and Volkswagen embodies the Everyman. Each brand thus uses characteristics of its archetype to reach distinct target markets and meet consumers' needs (Mark and Pearson 2001). Building a persona from a well-defined archetype

can create consistency both within the company and across marketing campaigns, social media communication, or future endeavors such as brand extensions (Howard-Spink 2002). Because most consumer decisions occur in the subconscious (Zaltman 2003), the instinctive connection developed with a brand archetype through its promise to fulfill a basic human desire benefits the brand enormously. Brand archetypes are quickly becoming a prerequisite for developing and maintaining a strong brand identity (Mark and Pearson 2001).

In this chapter, I outline the use of brand archetype-driven personas and summarize the nascent literature on brand archetypes. Although the concept of archetypes is decades old, research on archetypes' use in branding contexts is sparse. I also empirically investigate the brand archetype model put forth by Mark and Pearson (2001). Their narrative categorized archetypes around distinct human motivations (e.g., social connection), but was not based on consumer perception. Therefore, an interesting question is whether consumers actually perceive their 12 archetypes as distinct and whether they cluster as proposed. A multidimensional scaling analysis finds that consumers perceive similarity between archetypes differently than previously proposed. I next analyze the relation between archetypes and individual personality traits. If archetypes function as prototypes, theory would suggest each archetype is associated with multiple brand personality traits, and I find support for this argument. Further, I note the shared personality traits among archetypes that distinguish the clusters from each other. Finally, I test consumers' associations of brand archetypes with real brands and I conclude by highlighting areas fruitful for future research on brand archetypes. In sum, this paper provides a refined conceptualization of brand archetypes and responds to calls for more research integrating brand archetypes into marketing (MacInnis and Folkes 2017; Roberts 2010).

LITERATURE REVIEW

Brand Personas

From a legal standpoint, a brand is the name and logo of a good or service that differentiates the brand from competition (Aaker 1991; Weilbacher 1995). For consumers, however, a brand is a compilation of associations held about the brand based on their experiences (Kapferer 2004). This compilation of associations includes a brand's core identity and extended identity (Ghodeswar 2008). The core identity involves product attributes, user imagery, and quality. Over time and across product categories, the core identity should not change, but instead reflect the enduring values of the brand. The extended identity complements the core brand identity elements and infuses secondary associations through brand personality and symbolism (Ghodeswar 2008). Put another way, the extended identity is the manifestation of the core identity in marketing communication via a brand persona. For example, the image of Betty Crocker has changed many times to reflect the culture, but the company never waives from its desire to cultivate family food traditions and be a trusted source for home cooks.

Companies invest significant resources into developing effective brand personas that convey key values and characteristics to consumers. Wendy's has successfully implemented one of the more effective personification campaigns. On social media, the burger chain's Twitter account engages in witty banter with other users, including their direct competitors, which conveys a light-heartedness relatability. In commercials, a young girl with red hair plays a fictional Wendy character. Brand partnerships and advertisements can also signal important values and brand characteristics. For example, Wendy's partnered with Fortnite to create a "Wendy" character (complete with a blue dress and red pigtails) who destroyed freezers in the

game's 'Food Fight' mode, reinforcing Wendy's brand pillar that their burgers are "Fresh, never frozen."

Past research suggests that brand personas, and therefore archetypes, can function as either exemplars or prototypes. Exemplars are a specific representation or an actual member of a category or group (e.g., robins, penguins, and ostriches are specific exemplars of the bird category) (Nosofsky 2011). An archetype should work as an exemplar if a specific example of an archetype is used (e.g., Indiana Jones as an Explorer). However, I posit that archetypes function more often as prototypes. Rather than being a specific example, prototypes are comprised of similar characteristics that all members in a group share (e.g., a prototypical bird has feathers, a beak, the ability to fly, etc.). Supporting my argument that archetypes function more as prototypes, prior research has shown that brand personas (a part of the extended identity) signify brand personality traits (e.g., exciting, sincere, rugged) (Aaker 1997; Bechter et al. 2016). For example, consumers associate a Hero archetype with Exciting and Rugged and the Caregiver archetype with Sincere. Additional brand associations such as "stylish" are also conveyed via anthropomorphized characters, product personification, or user imagery (Keller 1998; Ng and Houston 2006). Ultimately, a brand persona prototype is the average of a set of brand personality dimensions or characteristics, and the broad concept of "Explorer" activates prototypical characteristics of an explorer.

Archetypes

Archetypes are patterns, models, or images that represent concepts or ideas and help people understand and categorize new information. For example, everyone has the image and

understanding of a mother figure who is caring, dependable, and compassionate. Whereas exemplar theory argues that people store these exemplars in memory from past experiences (Nosofsky 2011), Jung (1938) argued that all humans are born with a set of memories, images, or instincts (i.e., archetypes) that I understand innately. Carl Jung used the term “collective unconscious,” or an unconscious that all humans share, to describe how archetypal components are universally understood by everyone, as opposed to being specific to personal experience. For example, cultures around the world have their own stories and myths, such as the creation of the universe, that share underlying patterns, themes, or characters (e.g., an omniscient being). Within these shared myths and stories exist recurring symbols (i.e., archetypes) that people across time and cultures understand (Campbell 1949).

Brand Archetypes

Because of the universality of archetypes and their impact on behavior, it is not surprising that Jung’s foundational description of archetypes was adapted for marketing. Brand archetypes differentiate a brand from its competitors and can also strengthen consumer-brand attachments (Park et al. 2010). Consumer-brand relationships are the highest level of brand resonance, and companies with strong brand relationships benefit from their consumers’ higher levels of brand engagement, positive word of mouth, and brand loyalty (Batra, Ahuvia, and Bagozzi 2012; Fournier 1998). Brand archetypes anthropomorphize the brand, which elicits perceptions that a brand has feelings, can make intentional decisions, and is an entity with which a relationship can be formed (Epley and Waytz 2010; MacInnis and Folkes 2017; Waytz, Epley, and Caccioppo 2010). Further, because archetypal knowledge exists in the unconscious, consumers feel an

instant recognition and familiarity with archetypes without excessive cognitive processing (Siraj and Kumari 2011).

Brand archetypes also facilitate brand stories and promotional campaigns, which create brand meaning and foster emotional connections with consumers (Randazzo 2006; Thompson 2004). Story-based (vs. lecture-based) advertising uses narrative to deliver a message and bring the audience into the narrative, which more effectively creates emotional connections (Edson Escalas 2004; Wells 1988). Archetypal stories are especially effective because they are universally understood. The familiar traits and motivations of archetypal figures span cultures and are a fundamental aspect of an engaging story (Faber and Mayer 2009).

Although Jung believed there to be infinite archetypal symbols, he acknowledged some were more frequent and more recognizable. For example, people understand the nature of a Mother figure (e.g., nurturing, dependable) so deeply it can describe people who are not mothers (e.g., Mother Teresa) and even nonhuman concepts (e.g., Mother Nature). Brand archetypes have been categorized in various ways since their inception (Faber and Mayer 2009; Mark and Pearson 2001; Scarry 1997). However, the most widely accepted classification is that proposed in *The Hero and the Outlaw*, which organizes twelve brand archetypes into triads that share a “basic human motivation” (i.e., connection with others, leave a mark on the world, provide structure, and yearn for paradise). For example, the Jester, Everyman, and Lover have different desires (Enjoyment, Belonging, and Intimacy, respectively), but they are all driven by an overarching need to connect with others. In three exploratory studies, I assess whether consumer perceptions of the 12 brand archetypes align with the needs and motivations ascribed to them in Mark and Pearson’s treatise on them. To set the stage for these analyses, I begin by detailing the motivations that Mark and Pearson ascribed to brand archetypes (also presented in Table 1).

Connection with others. The need for affiliation is one of three basic psychological human motivations (Koestner and McClelland 1992; Murray 1938). Although people differ on their baseline need for affiliation (Kassin, Fein, and Markus 2008), evidence shows this need can change within a person many times even in a single day (O'Connor and Rosenblood 1996). Situationally, emotions such as fear or mortality salience can heighten the need for affiliation (Kassin et al. 2008). Thus, brands that embody the archetypes motivated by connection with others (i.e., the Everyman, the Jester, and the Lover) may benefit disproportionately from national emergencies (e.g., September 11, 2001).

Mark and Pearson proposed that the **Everyman** archetype wants to help people feel that they belong and seeks to fulfill connection by appealing to the sense of tribalism that humans have. Brands that people use every day (e.g., Target, IKEA) benefit from the Everyman archetype. Sometimes called a “Regular Guy/Gal,” this archetype argues that everyone is equal, at least in the sense that everyone is human. As such, any attempt to stand out or suggest elitism will be a turn off to consumers who want to belong. We further see this archetype employed by executives when they reveal vulnerable aspects of themselves to try and relate to their audience.

Beyond merely a sense of belonging, the **Lover** archetype is rooted in a desire for deep, special relationships and wants to connect intimately with others. The Lover helps consumers find, but also give love to others. Although parent-child relationships and friendships can benefit from the Lover, this archetype is most commonly associated with romantic relationships. The argument that making oneself more attractive leads to intimacy and affection leads many makeup brands to embrace the Lover archetype, as well as brands that promise sexual appeal (e.g., Victoria's Secret). Elegant or indulgent brands (e.g., Ghirardelli) also appeal to consumers desiring intimacy.

Finally, the **Jester** is thought to be driven by a desire to make others laugh and connect through humor and enjoyment. When people want to simply have a good time, Jester brands meet their need. The optimism and positivity that is central to Jester brands means they are a popular archetype for brands associated with children (e.g., M&Ms, Skittles). Jester brands also break the rules and liven up everyday situations. The Dollar Shave Club, for example, humorizes the mundane self-care tasks of shaving and buying new razors.

Provide structure to the world. People are also fundamentally motivated to control the world around them (Burger 1992). In fact, people who have a higher need for control anthropomorphize nonhuman entities more quickly than those with low need for control (Epley, Waytz, and Cacioppo 2007). Depending on the underlying desire, structure and security can look very different for each of the three archetypes—Caregiver, Ruler, and Creator.

Mark and Pearson suggest the **Caregiver** seeks to serve others and alleviate problems and pains. By nature, the Caregiver is an altruist whose goal is to make others feel safe and secure, making the Caregiver a fitting archetype for brands in medical care or health (e.g., Johnson & Johnson), or nonprofits and charity groups (e.g., UNICEF). Alternatively, a brand like Campbell's is not related to medicine, but embodies the Caregiver by positioning their product as comforting food ("Good for the body, good for the soul") and they use nurturing images of homes and families in their advertisements. Companies for which customer service is a competitive advantage (e.g., Nordstrom) also benefit from the Caregiver archetype

In stark contrast to the Caregiver, the **Ruler** is motivated to look for structure in their world by controlling others. Although the initial idea of "total control" may seem negative, the Ruler archetype is often extremely responsible and in charge of many tasks. An efficient soccer mom, for example, provides the control a rowdy group of children needs. The Ruler lacks faith

that others know how to protect themselves, leading them to take control of their environment to ensure everyone's safety. However, power and prosperity are also important to the Ruler. In this regard, brands that exude status, such as Reserve credit cards or luxury cars, often embody the Ruler archetype.

The **Creator** also desires control but prefers control over projects in the interest of self-expression. Mark and Pearson propose that the Creator's goal is to craft something new that will last. The Creator archetype is commonly used with arts and crafts products (e.g., Crayola) or with products geared at construction (e.g., Lego). However, fitness programs may help people "craft a better body" and makeup lines might help one "create art" on the body. True to the Creator's imagination, the sky is the limit on what type of brands may effectively embrace this archetype.

Yearn for paradise. Mark and Pearson proffered that the Innocent, the Explorer, and the Sage are motivated by self-fulfillment, or the "carrying to fruition one's deepest desires or one's worthiest capacities" (Gewirth 2009). In philosophy, self-fulfillment needs include pursuing creative activities and achieving one's full potential, which can only be pursued when one's psychological and basic needs have been met (Maslow 1943). Across cultures, people want to live life to the fullest, and maximizing one's potential culminates in a satisfying life well-lived (Gewirth 2009).

To that end, the **Innocent** believes that happiness can be found right where one is, and that people are safe to just be as they are. The Innocent archetype wants people to believe in purity and basic goodness. Baby brands (e.g., Babystyle) are naturally drawn to the Innocent archetype, as are brands whose goal is to help one maintain childlike awe and wonder (e.g.,

Coca-Cola). Interestingly, Coors beer (a vice), has successfully embodied the Innocent archetype by highlighting the purity of the water they use to brew their beer.

In contrast to the Innocent's general contentedness in the here and now, the **Explorer** is said to seek freedom and pursues adventures in the belief that something better is "out there." The Explorer experiences restlessness or dissatisfaction and wants to help others maintain independence and experience an authentic life to the fullest. Brands that effectively embody the Explorer include brands that help people get outside (e.g., The North Face, Patagonia) and off the beaten path (e.g., Jeep). However, brands that encourage exploration in other ways, such as through taste (e.g., Starbucks' coffee from other countries), also appeal to the Explorer's constant pursuit of the unknown.

Finally, the **Sage** seeks self-fulfillment through acquiring wisdom, looking to experts, and searching for the absolute truth. The Sage wants to help others understand their world. Brands that archive and/or share knowledge, such as many universities, embody the Sage. Additionally, *The New York Times* keeps readers informed about the most important news stories. They, along with other news brands (e.g., CNN) make sure to source their stories, ensuring they share true and objective information. Similarly, Consumer Reports helps consumers make better decisions about what products to buy.

Leave a mark on the world. Another fundamental human motivation is to be remembered. People want to know their life mattered and leave a legacy, whether through positive change or destruction. Enacting memorable change often requires risk-taking and perseverance. As a result, world-changing actions are often self-esteem boosting and result in social validation. Mark and Pearson thus proposed that the final three archetypes (the Hero, the Magician, and the Outlaw) often transcend everyday life, making them desirable in brands or entertainment.

The **Hero**, the most iconic of the twelve archetypes, is often portrayed triumphing over evil or overcoming a major challenge. In fact, aspects of the Hero's journey exist in every archetype (Pearson 1991). The Hero wants to obtain mastery in their realm and use those skills to impact the world. That is, the Hero loves to rise to challenges, overcome obstacles, and defeat injustice. Brands such as Nike and Adidas offer products to help consumers attain competence and strength and compete athletically. The versatility of the Hero makes it the most commonly used brand archetype (Tsai 2006). Although Hero brands usually empower consumers to achieve greatness, they can also "be the Hero" themselves. For example, FedEx promises to overcome all obstacles to deliver packages on time.

The **Outlaw** archetype is founded on disruption and disobedience, but not necessarily for evil (think of Robin Hood stealing from the rich to give to the poor). Indeed, many people today embrace an Outlaw mindset when they want to break the status quo or stand out. Just as brands do an excellent job of signaling group membership, they can also signal that one is *not* part of a group (Kirmani 2009). Outlaw brands tend to change over time, and we often observe once-Outlaw brands and trends become mainstream (e.g., rock music was once counterculture). Harley-Davidson is one of the most notable Outlaw brands. More than just a motorcycle, Harley-Davidson sells a product that allows anyone (often professionals or otherwise tame individuals) to unleash their wild side and rebel from mainstream values and conventions.

Finally, it has been suggested that the **Magician** believes anything is possible and wants to enact change in the world by making others' dreams come true. Brands that offer magical moments to their consumers (e.g., Disney) effectively embody the Magician archetype. The Magician's promise of transformation is also extremely versatile. Health and wellness products (e.g., essential oils) tout transformation from worn out to refreshed, and may draw on ancient

knowledge or promise spiritual connection (with oneself or others). Relatedly, New Balance encourages people to set aside their computer and put on their running shoes to connect with themselves. The Magician's grand vision and refusal to accept limits also lends itself to brands pursuing medical, scientific, and technological advances. See Table 1 for a summary of Mark and Pearson's (2001) archetype classification and each archetype's proposed components.

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Brand Archetype Literature

Although the concept of archetypes has existed for decades, research that directly applies archetypes to brand effectiveness is relatively sparse. Brand archetype research typically falls into one of three categories: brand archetype execution, commonly used brand archetypes, and the effectiveness of brand archetypes in advertising.

Execution of Archetype. In addition to choosing an archetype, brands must also carefully consider how to execute the archetype (Caldwell, Henry, and Alman 2010). Brands need to maintain a consistent brand voice across all communication channels, including advertisements, social media, and the brand website (Kohli and Yen 2019). Anthropomorphized characters, such as the Jolly Green Giant or the Brawny lumberjack build the brand's visual identity, and these must be archetype-consistent as well. Subaru enjoyed years of growth when they employed Paul Hogan (a.k.a., Crocodile Dundee) to be the spokesperson for the Subaru Outback (Randazzo 2006). Paul Hogan brought the Outback brand to life through his personality and helped Subaru build a unique brand identity. Archetypal characters might exist only for short periods of time

(e.g., a promotional campaign, product introduction) or they can be enduring. For decades, Marlboro effectively used the cowboy as their American Hero archetype. Despite the fact that tobacco advertisements in the United States have been illegal since 1998, Marlboro remains one of the most valuable brands in the world (Schultz, Pasquarelli, and Wohl 2017).

Additionally, logos and symbols can also represent archetypal images. For example, a logo with “helping hands” conveys the Caregiver archetype and reinforces a brand’s supportive nature. Early work also suggests that brand archetypes are associated with specific colors (i.e., hue, saturation, brightness) and that colors can be used in a logo to either represent or accompany an archetype (Broek 2014). The color white, for example, is associated with innocence and purity, making it preferred with the Innocent archetype. In contrast, the association of green and brown with the natural world makes these colors favorable with the Explorer archetype.

Common Brand Archetypes. Although brands should choose the archetype that best resonates with the human desire of their target customers, some archetypes are more common than others. As mentioned earlier, the Hero is the most commonly used archetype in marketing due to its versatility (Tsai 2006). In China, the Hero archetype is used so frequently that research has further delineated four types of Heroes (e.g., the Modern Tycoon, the Little Emperor) (Scarry 1997). Since people seek mastery in many domains (e.g., fitness, self-help, business, family), numerous brands have the potential to position themselves as a hero that will help the consumer achieve success. The Hero archetype has also been associated with the act of consumption itself (e.g., Brown 1995; Randazzo 2006; Veen 1994). That is, a product search can be thought of as a Hero’s journey to find the *right* product to facilitate mastery (Hirschman 1989; Veen 1994).

Although Mark and Pearson’s twelve archetypes are technically gender neutral, archetypes have often been gender linked (e.g., Ruler, Outlaw are often depicted as male;

Caregiver and Lover are often depicted as female; Roberts 2010). Although these gender stereotypes are outdated in many societies, those legacy associations have nonetheless endured in many branding executions. For example, beer often tries to appeal to the (male) Everyman whereas beauty products often align with the (female) Lover (Roberts 2010). Further, a cross-cultural examination of television commercials that aired during the 2000 Olympics found that although male and female athletes were both depicted as Heroes, the type of portrayal was different. Male athletes were lauded more for preparation and competition while female athletes were honored for their skill and achievement (Goodman, Duke, and Sutherland 2002).

Archetypes in Advertising. Archetypes closely resemble allegories and metaphors, which have been shown to be effective in advertising and promotional campaigns (Walle 1986). For example, symbolism and personification are fundamental elements of an allegory, and their persuasive success in advertisements suggests that archetypes (i.e., symbolic characters) can also be persuasive marketing tools (Stern 1988). As abstract visual symbols, archetypes create and communicate complex messages and concepts (Scott 1994). For example, a commercial in which a grandmother teaches her granddaughter how to cook linked the product (milk) with the archetypal symbol, the Caregiver (i.e., the grandmother; Maso-Flesichman 1997). This link activated the consumer's need for connection, and attitude towards the product increased.

Since archetypes exist in the collective unconscious and act as “organizing principles” (Jung 1954), messages that activate fundamental or innate desires are more effective than messages that are not (Groeppe-Klein, Domke, and Bartmann 2006; MacInnis, Moorman, and Jaworski 1991). One study compared non-conscious arousal between viewers of archetype-loaded commercials and non-archetype-loaded commercials. Arousal was greater in response to archetype-loaded (vs. non-archetype-loaded) commercials, which increased explicit attitude

(Groeppel-Klein et al. 2006). This finding is supported by research suggesting that the symbolism of archetypes in advertising resonates with audiences more than literal messages (McGuire 2000).

Although the brand archetype model is steadily gaining use and acceptance, it remains relatively understudied in marketing literature. To my knowledge, no research has investigated whether the twelve archetypes are distinct from one another and if they group together as first proposed by Mark and Pearson (2001). Thus, I accept the twelve well-defined brand archetypes and, in Study 1A, investigate both the distinctiveness of the archetypes and how they should be clustered based on consumer perception. In Study 1B, I examine the relation between personality traits and brand archetypes. Specifically, I compile personality trait bundles for each archetype and find support for the archetypes-as-prototypes argument. Building from Study 1A, I also highlight the shared personality traits across my newly proposed clusters. Finally, Study 2 tests whether people meaningfully differentiate between archetypes as they relate to real brands and how strongly they associate brands with certain archetypes. I conclude with a discussion of future research ideas.

STUDY 1A – ARCHETYPE DISTINCTIVENESS

Mark and Pearson (2001) categorized the twelve archetypes around four human motivations (e.g., connection with others). Although perhaps theoretically sound, this classification has not been empirically tested against consumers' perceptions of archetypes. Thus, in Study 1A, I use multidimensional scaling to assess perceived similarities and see if consumers classify archetypes as described in Mark and Pearson (2001). Study 1A examines the

within-pair similarity for each of the 66 combinations of brand archetype pairs (i.e., $C(12,2) = 66$).

Participants and Procedures

Participants were 242 U.S. adults recruited from Amazon's Mechanical Turk (MTurk). First, participants read the description of an archetype, why archetypes are important to branding, and what each dimension of the archetype profile means. Each archetype profile consisted of a Desire, a Goal, a Fear, a Strategy, a Trap, and a Gift. For example, in the context of an archetype, a Desire outlines the main motivating desire of the archetype (see Appendix for all archetype descriptions). Next, each participant viewed a randomly assigned pair of archetypes, read a description of both archetypes (see Appendix for full descriptions), and rated how similarly they perceived the archetypes on three 7-point scales. The three items (see Appendix) were combined to create a composite measure of similarity ($\alpha = .94$). In total, each participant rated the similarity of 15 randomly assigned pairs of archetypes.

Results and Discussion

Pair similarity. For each archetype pair, I conducted a one-sample *t*-test to assess similarity. I tested each archetype pair against a test value of four (the midpoint on a 7-point scale, where 7 indicated very similar). Results showed that the mean similarity rating for 44 of 66 pairings was significantly below the midpoint, indicating participants perceived most archetypes as significantly different from one another ($ps < .01$). Nineteen archetype pairs were

not significantly different than the midpoint ($ps > .05$), and three pairs were significantly similar to each other (i.e., mean similarity rating significantly higher than the midpoint). Table A1 in the Appendix contains the results for all pairs.

Multidimensional Scaling Solution. Next, I used multidimensional scaling (MDS) to visually represent the relations between archetypes. I first recoded values such that higher numbers indicated greater dissimilarity, and analysis was conducted using PROXSCAL in SPSS. First, I created a scree plot to find an appropriate solution dimensionality. According to the scree criteria, a sharp bend in the scree curve indicates how many dimensions to use (Kruskal 1978). As seen in the scree plot in Figure 1, a sharp break occurs at two dimensions. This indicates that moving from one dimension to two dimensions significantly reduced the stress (and increased the goodness of fit), but moving from two dimensions to three dimensions did not significantly reduce the stress.

INSERT FIGURE 1 ABOUT HERE

Thus, I continued my analysis with a two-dimensional solution. The PROXSCAL analysis adjusted the position of each item (archetype) in space to minimize the distance between each archetype and the others. The derived common space (Figure 2) accounted for 93.5% of the variance, with normalized stress = .064.

INSERT FIGURE 2 ABOUT HERE

An overarching narrative in the literature is that the archetypes can be classified into four triads based on their shared human motivations. However, these commonly accepted clusters were not based on consumer perception, and thus one goal of Study 1A was to see if consumer perceptions align with the original typologies. My multidimensional scaling model supports a different set of four clusters which I propose are defined by two dimensions: 1) arousal level and 2) sphere of influence. Four archetypes are defined by lower arousal (Caregiver, Innocent, Everyman, Sage), five archetypes activate a higher level of emotional arousal (Lover, Jester, Magician, Hero and Outlaw) and three archetypes are perceived as neither particularly calming or arousing (Explorer, Creator, Ruler). The other differentiating dimension I find is whether the archetype seeks intimate relationships or broader societal influence. Four archetypes are driven more to societal level influence (Ruler, Outlaw, Hero, Sage), four are more interested in individual level relationships (Lover, Jester, Caregiver, Magician), and four are rather neutral on this dimension (Innocent, Explorer, Creator, Everyman).

These two dimensions create four clusters that differ from Mark and Pearson's originally proposed groups. Four archetypes comprise the first cluster (i.e., *Sense of Calm*) because of their mutual calming presence. The archetypes in this cluster (Caregiver, Innocent, Everyman, and Sage) are not unemotional, but rather exude a calm demeanor in which people are not highly aroused in their presence. Even though the Caregiver and the Sage differ on their tendency to form relationships (Caregiver) or influence the masses (Sage), neither intends to rile their audience. The second cluster (i.e., *High Social Influence*) is a set of three highly emotionally arousing archetypes with large, societal influence – Hero, Outlaw, and Ruler. Cluster three (i.e., *Positive Emotional Arousal*) is also comprised of highly arousing archetypes, but these three archetypes—Lover, Jester, and Magician—seek more intimate relationships. Finally, there is pair

of archetypes—Explorer and Creator—that are rather neutral on these two dimensions. Both the Explorer and the Creator are more internally driven and seek a *Sense of Wonder*. Although they can influence others, that is not their fundamental drive. Similarly, neither archetype consistently arouses others nor exudes abundant calmness. In the next study, I explore shared characteristics within clusters.

My classification of the twelve brand archetypes, based on consumer perceptions, differs markedly from the original four quadrant delineation (see Figure 3). For example, in the original classification, the Everyman and the Jester shared the human motivation to connect with others. However, consumers perceived these two archetypes as extremely opposed on both dimensions. Consumers perceived the Jester to be highly arousing and in pursuit of intimate relationships, whereas they believed the Everyman exuded a calming influence and seek relationships with more people.

INSERT FIGURE 3 ABOUT HERE

STUDY 1B – ARCHETYPES AND PERSONALITY TRAITS

In Study 1B, I investigate the prototypicality of brand archetypes. Mark and Pearson (2001) cite a Young & Rubicam consumer survey assessing archetype identification and brand valuation. In their survey, consumers were asked to rate archetypes on 48 distinct characteristics (e.g., personality dimensions). Each of the twelve archetypes was comprised of a different set and weights of the personality dimensions. Study 1B tests that notion that archetypes are comprised of many (versus one) personality traits and in doing so, complements existing

research that investigates archetypes' association with the brand personality framework (Bechter et al. 2016).

Participants and Procedures

Participants were 200 MTurk U.S. adults. Participants first read a summary of brand archetypes and then a description of a specific archetype (see Appendix). Next, participants rated the archetype on 25 personality traits (i.e., “How likely is it that a person embodying the archetype [ARCHETYPE], would be...[PERSONALITY TRAIT]”; 1 = *Extremely Likely*, 7 = *Extremely Unlikely*). Each participant rated the same 25 personality traits for three randomly assigned brand archetypes.

Results and Discussion

Rank order. To test for significant differences between personality traits, I conducted a repeated measures ANOVA on the mean personality trait scores by archetype. Higher numbers indicated that participants perceived the archetype as more likely to exhibit the personality trait. For each archetype, there was a main effect of personality trait, supporting the argument that archetypes differentially exhibit personality traits ($ps < .001$). Next, I made a priori theoretical predictions about which personality trait would rank highest in each archetype (e.g., Hero – Brave, Everyman – Relatable). I rank ordered the personality traits within each archetype and, except for the Outlaw, the highest personality traits matched my predictions (see Table 2). For

the Outlaw, I predicted Rebellious would be highest, but instead Rebellious ranked the second highest behind Adventurous (although not significantly higher).

INSERT TABLE 2 ABOUT HERE

Common Personality Traits. Next, I investigated the personality traits as they relate to each archetype individually. I conducted 25 *t*-tests (one for each personality trait) on each archetype. I classified traits that were significantly higher than the scale midpoint of four as part of a bundle of personality traits associated with a specific archetype. The median archetype was significantly associated with 14 of the 25 personality traits. In fact, the Hero was strongly associated with 17 of the 25 personality traits. The multifaceted nature of the Hero supports literature that finds the Hero as the most used brand archetype (Tsai 2006). More generally, however, the high number of personality traits associated with each archetype supports the argument that archetypes function as prototypes (vs. exemplars). Even the archetype with the smallest trait bundle (Ruler) was associated with nine different personality dimensions. When the full range of personality traits are combined does an archetype take on its full meaning.

I next looked at the personality traits shared between archetypes within each of the four clusters identified in Study 1A. Interestingly, the two archetypes in the *Sense of Wonder* cluster, had the largest overlap of personality traits. In fact, the Creator was the only archetype whose traits were completely subsumed by another archetype in its cluster (i.e., no personality traits independent from the others). Further, the Explorer and the Creator had 16 overlapping traits including Adventurous, Kind, Sophisticated, and Wise. Their association with such varying traits may explain their neutrality on the two dimensions. Archetypes in the *Sense of Calm* cluster

shared eight personality traits. As expected, the shared personality traits offer a sense of comfort to others as opposed to invoking high arousal. For example, these four archetypes were perceived to be Kind, Likeable, Relatable, Sincere, and Trustworthy, among others.

In the high arousal clusters, Positive Emotional Arousal archetypes shared six overlapping personality traits and those in the High Social Influence shared five personality traits. Noting the difference in the shared personality traits between clusters, however, supported their differentiation on intimate connections versus societal influence. For example, the *Positive Emotional Arousal* group was perceived to be Adventurous, Creative, Exciting, Humorous, Imaginative, and Likeable – all traits that facilitate relational connection. In contrast, the archetypes seeking *High Social Influence* were perceived to be Authoritative, Brave, Competent, Intelligent, and Rugged. These traits suggest a sense of dominance and mastery required to influence large groups of people.

Every archetype (except the Creator) had a unique set of at least three additional personality traits that differentiated it from other archetypes, both within their cluster and amongst all twelve. This supports my argument that archetypes function as prototypes comprised of many dimensions and shows that single personality traits do not distinguish archetypes. Table 3 shows the full set of personality bundles.

INSERT TABLE 3 ABOUT HERE

STUDY 2 – ARCHETYPES’ ASSOCIATIONS WITH REAL BRANDS

In Study 2, I analyze whether people meaningfully differentiate archetypes between real brands and further, I observe how strongly an archetype is associated with a given brand. I

reexamine Mark and Pearson's (2001) assertion that real brands generally associate with a single archetype. Specifically, I label brands Tightly Defined (when strongly associated with a single archetype) or Flexible (when strongly associated with multiple archetypes).

Participants and Procedures

Participants were 157 U.S. adults recruited on MTurk. First, participants read a description of brand archetypes generally. Then, participants were presented with an archetype profile and asked to rate the extent to which thirty brands represented the archetype (1 = *Extremely bad fit*, 6 = *Extremely good fit*). Participants rated each of the thirty brands for three randomly assigned archetypes and participants could also say they were unfamiliar with the brand.

Results and Discussion

Brand classification. I classify brands as either *tightly defined* or *flexible*. Tightly defined brands have the archetype they are perceived to be most representative of as more than 10% higher than the second most representative archetype. For flexible brands, in contrast, the second most representative archetype is less than 10% below the most representative archetype. Of the 30 brands in the study, only 12 brands were *tightly defined* (see Table 4). Participants rated Victoria's Secret, for example, as most representative of the Lover ($M = 4.88$) and second most representative of the Creator ($M = 3.69$). This 1.19 point difference was greater than 10% (i.e., tightly defined). Interestingly, the Creator and the Everyman were the most common

representative archetypes of brands that were tightly defined. For 18 brands, the top two most representative archetypes did not differ by more than 10% and were thus classified as *flexible* brands. For example, the top two most representative archetypes for Dove were Lover ($M = 4.63$) and Innocent ($M = 4.60$), which differ by less than 10%.

INSERT TABLE 4 ABOUT HERE

Study 2 confirms that brands indeed are strongly associated with archetypes. Although prior literature and popular branding websites (e.g., adage.com) describe brands as singular archetypes (see Table 1 for examples; Mark and Pearson 2001), Study 2 suggests that many brands are actually associated with multiple archetypes. This study highlights the difficulty in brand archetype execution, but also suggests brands may have flexibility in the persona they want to convey to consumers.

GENERAL DISCUSSION

In summary three exploratory studies respond to the call for more research that integrates brand archetypes with marketing and advertising research (MacInnis and Folkes 2017) and empirically test the seminal brand archetype framework put forth by Mark and Pearson twenty years ago. Across three studies I find support for certain aspects of their framework (i.e., 12 distinct archetypes) and propose reconceptualizing other aspects (i.e., how the 12 archetypes are clustered). In Study 1A, I found that the 12 archetypes were seen as distinct from one another. The majority of archetype pairs were seen as dissimilar, suggesting that people differentiate the archetypes on underlying characteristics. Further, a multidimensional scaling analysis returned a

four-cluster solution that differed from Mark and Pearson's (2001) model. Four clusters (Sense of Calm, Sense of Wonder, High Social Influence, and Positive Emotional Arousal) differ on two dimensions (Arousal and Societal Influence). I find very little overlap between how consumers perceive archetypes and the prior categorization around basic human motivations. Thus, I propose a refined brand archetype categorization that can be seen in Figure 3.

Study 1B built on the prior study by investigating the underlying personality traits associated with each brand archetype. Analysis of the shared personality traits within clusters provided more insight into how consumers perceive the archetypes. For example, archetypes in the Sense of Calm cluster are comfortable to be around, exhibiting Sincerity, Relatability, and Kindness. In contrast, archetypes in the High Social Influence cluster portray dominating, high arousal characteristics such as Arrogance, Authoritative, and Rugged. The Positive Emotional Arousal cluster, even though similarly arousing, exhibit a much more positive set of characteristics including Exciting, Humorous, and Imaginative. Finally, the two archetypes in the Sense of Wonder cluster have the greatest overlap—16 characteristics. The Explorer and the Creator are relatively neutral on arousal and influence level, perhaps because they are both associated with such a wide variety of characteristics including Adventurous, Kind, Sophisticated, and Wise (see Table 3 for all personality trait bundles).

Study 1B further supports the argument that archetypes operate as prototypes. That is, archetypes are constellations of personality traits as opposed to representative of singular dimensions. Except for the Creator, each archetype is associated with a unique set of at least three personality traits that differentiate them from each other, further supporting the distinctiveness findings from Study 1A. Finally, Study 2 assessed the perception of brand archetypes as they relate to real brands. In contrast to Mark and Pearson's (2001) work that

argued people associate brands with one archetype, the majority of brands (18 out of 30) I tested were perceived as representative of two or more archetypes.

A review of the literature on brand archetypes suggests there are many viable avenues for future research. First, I suggest investigating brand congruency effects. Research argues that archetypes activate basic human needs (Groeppe-Klein et al. 2006). In Study 1A, I show that the twelve archetypes are distinct from one another, each with a unique motivation and desire. It should follow that priming a certain need would make consumers more likely to purchase a brand associated with the related archetype. For example, activating one's need for freedom would increase their (relative) desire for a Jeep, since the Explorer archetype (i.e., Jeep's archetype) facilitates freedom. Study 2 further supports this line of research, as many brands are associated with multiple archetypes. For example, Xbox was seen as representative of both the Jester and the Creator, suggesting they could successfully choose either archetype around which to build a brand persona, depending on who they want to reach.

Second, extant literature largely focuses on how brand archetypes are executed. Brand archetypes create a cohesive brand strategy and can guide marketing communications and brand behavior (Howard-Spink 2002). In this way, archetypes can also predict the success of potential brand extensions. Current measures of brand extension fit primarily assess parent brand technical expertise and functional brand attributes (Aaker and Keller 1990). In the absence of fit on these measures, however, a shared brand archetype might allow a brand to extend into a new product category with no technical expertise, as long as the new product category is associated with that same archetype.

Finally, I suggest future research investigate how brand archetypes allow a brand to leverage associations in the realm of corporate social responsibility (CSR). At first glance, it may

seem that certain archetypes would not benefit from CSR engagement. For example, neither the Ruler nor the Jester are associated with generosity. However, the cue congruency effect (Miyazaki, Grewal, and Goodstein 2005) suggests brands may benefit by associating with archetype-aligned nonprofits. That is, a brand from the High Social Influence cluster could successfully partner with a nonprofit that is associated with Intelligence or Ruggedness, two characteristics with which they are highly associated. It is these latter two directions that this dissertation investigates in the following two chapters.

CHAPTER 2. THE EFFECT OF ARCHETYPE-BASED CAUSE-BRAND FIT ON CAUSE-BRAND ALLIANCE SUCCESS

Companies consider corporate social responsibility (CSR) a critical means of improving the awareness and stature of the brand (Chandler 2020; Menon and Kahn 2003; Pappalardo 2017). Defined as “a commitment of [a corporation] to improve community well-being through discretionary business practices and contributions of corporate resources” (Kotler and Lee 2005, p. 3), CSR has many positive benefits including improved brand sentiment, increased purchase intentions and more frequent word-of-mouth recommendations (Brown and Dacin 1997; Chernev and Blair 2015; de Jong and van der Meer 2017; Menon and Kahn 2003; Sen and Bhattacharya 2001; Trudel and Cotte 2009). Almost 90% of Americans would consider switching from a brand that does not engage in CSR to one that does (price and quality being equal) (Du, Bhattacharya, and Sen 2010). Further, CSR initiatives buffer companies from negative information and reduce consumer anger following service failures (Klein and Dawar 2004). In response to product-harm crises, for example, consumers are more likely to attribute fault to external (vs. internal) reasons when companies have engaged in CSR.

Many types of CSR exist, including philanthropic sponsorships (Menon and Kahn 2003), advocacy advertising (Haley 1996), socially responsible manufacturing practices (Drumwright 1994), and cause-brand alliances (Lafferty, Goldsmith, and Hult 2004). Cause-brand alliances are popular because they benefit both the brand and the cause (Lafferty and Goldsmith 2005). Examples include Baskin Robbins’ partnership with Joy in Childhood Foundation and Yoplait’s partnership with the Susan G. Komen for the Cure organization. Such partnerships allow brands to enhance their image and differentiate themselves from competitors, while the partner nonprofit receives higher awareness, donor base growth, and increased donations (Lafferty

2009). Given these mutual benefits, it is important to understand factors leading to a successful alliance (Myers and Kwon 2013; Nan and Heo 2007). Overwhelmingly, research documents that the success of CSR hinges on *cause-brand alliance fit* (Becker-Olsen, Cudmore, and Hill 2006; Gupta and Pirsch 2006; Samu and Wymer 2009; Simmons and Becker-Olsen 2006). In a CSR context, fit refers to the degree of overlap between a cause and a brand's image, position, target market, and/or product offerings (Becker-Olsen et al. 2006; Varadarajan and Menon 1988). Consistent with associative network theory (Keller 1993), social initiatives that fit with brand associations are considered appropriate, and strengthen connections between a cause and a brand, resulting in more positive consumer attitudes (Aaker 1990; Becker-Olsen et al. 2006; Fiske and Taylor 1991).

Conveying a company's CSR practices to the public is critical, as casual consumers are often unaware of a company's engagement in CSR activities (Beckmann 2007; Du et al. 2010). To increase awareness, companies can issue quarterly CSR reports, advertise their CSR initiatives, or promote supported causes on their packaging (Du et al. 2010). When promoting CSR activity, companies may choose to anthropomorphize their CSR brand message, using first person language or adding humanlike features to their products (Waytz et al. 2010; Wen and Song 2017). Research has shown that CSR brand anthropomorphism increases buying pleasure by increasing perceptions of warmth (Jeong and Kim 2020) and creating feelings of anticipatory guilt (Ahn, Kim, and Aggarwal 2014). What research has not shown, however, is whether brand anthropomorphism can drive cause-brand alliance fit. I posit that brand personas influence fit perceptions, such that if a brand and a nonprofit share a brand archetype, both entities will experience positive outcomes. Such positive effects would align with the cue congruency effect,

wherein people respond positively to consistent cues (i.e., shared brand archetype) but anchor on negative information in the presence of inconsistent cues (Miyazaki et al. 2005).

This paper contributes to the literature in three primary ways. First, I add to the growing body of knowledge on brand anthropomorphism in CSR. Although generally accepted in the literature that brand anthropomorphism benefits brands, little research integrates brand anthropomorphism with CSR activities. I use a novel marketing technique – brand archetypes – to operationalize brand persona and manipulate fit. Second, I contribute to the broader CSR literature by investigating the process through which cause-brand alliance fit functions. Specifically, I propose that cause-brand alliance fit influences consumer responses toward the both the brand and the cause at least in part by increasing perceptions of authenticity. Further, I identify self-brand congruity as a moderator of cause-brand fit’s effect on perceived authenticity. Finally, I add to the dearth of research investigating benefits the cause (e.g., a nonprofit) receives from high-fit alliances (for an exception, see Lafferty and Goldsmith 2005). To my knowledge, this is the first paper to investigate the mediating process of authenticity on both brand and cause outcomes.

CONCEPTUAL REVIEW

Anthropomorphism and Corporate Social Responsibility

Research consistently shows that consumers engage with and judge brands as if they are humans (Aggarwal and McGill 2007; MacInnis and Folkes 2017; Puzakova, Kwak, and Rocereto 2013). Although humans have a universal tendency to view inanimate objects like themselves (Guthrie 1997; Hume 1956), brand actions can increase the accessibility of human knowledge

and ease the process (Epley et al. 2007). For example, a firm can prominently feature a brand persona, an anthropomorphized external representation of the brand's identity to strengthen consumer connection with the brand (Ghodeswar 2008). Consumers experience brand personas when they engage in conversation on social media or view an advertisement that has a spokesperson, character, or celebrity representing the brand. Brand personas can also be supported by specific features of the product and its advertising. For example, visual cues (e.g., eyes or a smile) and verbal cues (e.g., advertisements in first person language) activate a "human-like" schema that can increase perceptions of similarity between the observer and the product or brand (Aggarwal and McGill 2007). These anthropomorphic strategies make a brand or product seem more like a person and cause consumers to see the brand as an entity capable of thinking and experiencing emotion (Epley and Waytz 2010; Gray, Gray, and Wegner 2007) and worthy of direct social and emotional connection (Brewer 1979; MacInnis and Folkes 2017). Other positive outcomes of anthropomorphism include increased brand loyalty, brand attitude, and purchase likelihood (Jeong and Kim 2020; MacInnis and Folkes 2017).

In the nonprofit domain, anthropomorphism is particularly important for two reasons. First, anthropomorphism increases potential donors' feelings of connection to a cause and increases anticipatory guilt (were one to not help) (Ahn et al. 2014). Indeed, the anthropomorphism of nature increased conservation-oriented behaviors by cultivating stronger connections to nature (Tam, Lee, and Chao 2013). Second, the presence of an "other" increases socially desirable behavior (e.g., nonprofit donations; Sproull et al. 1996). People experience self-awareness when they believe others are watching and judging them (Duval and Wicklund 1972), and the judging "other" need not be human to elicit socially desirable behavior. Inanimate objects that *are perceived* to be humanlike can also increase socially desirable behaviors. As a

case in point, participants responding to a survey on an anthropomorphized (vs. not) computer gave more socially desirable responses because they felt that the computer was watching them (Nass and Moon 2000). Thus, if a potential donor feels that the brand or cause is an “other,” they should be more inclined to support the cause, thereby exhibiting a socially desirable behavior.

Brand Archetypes

An increasingly popular way to create a brand persona that will anthropomorphize a brand is to embrace a specific brand archetype. Archetypes have been proposed to be innately understood and linked to the fulfillment of universal, basic human needs (Jung 1938; 1954). As a result, archetypes effectively transcend time, culture, and geography (Campbell 1949). Within marketing, a brand archetype is a collection of concepts and characteristics centered around a fundamental human desire that can direct an overall brand persona (Mark and Pearson 2001). Mark and Pearson (2001) identified twelve distinct brand archetypes reflecting distinct human desires and motivations (see Table 5).

INSERT TABLE 5 ABOUT HERE

Brand archetypes consist of multiple personality traits, desires, goals, and strategies. By encapsulating these various characteristics, a brand archetype can signal a brand’s motivations and values to consumers and thereby facilitate consumer-brand relationships (Escalas and Bettman 2003). For example, Patagonia’s use of the Explorer archetype signals that they value freedom and adventure, and this can motivate a customer’s pursuit of the same. Although entire

product categories are sometimes associated with a specific brand archetype (e.g., beauty category is associated with the Lover archetype; Roberts 2010), archetypes can nonetheless help differentiate brands within a product category. For example, within the automotive category, Jeep embodies the Explorer archetype, while Mercedes-Benz symbolizes the Ruler archetype. The characteristics associated with these distinct archetypes construct a brand persona and convey a brand's attributes and values (i.e., brand identity) and attract consumers drawn to the archetype in question.

Cause-Brand Alliance Fit

Cause-brand alliances are a popular form of CSR because the partnership has the potential to benefit both parties (Lafferty and Goldsmith 2005). The cause receives direct benefits from the brand's support and the brand may receive indirect benefits through increased awareness and clear signaling of the brand's values. To maximize these indirect benefits, firms should carefully assess which causes are most aligned with the brand's values and fully understand how consumers perceive these alliances. Unsurprisingly, consumers' prior brand experiences affect perceptions of the cause-brand alliance (Hajjat 2003; Lafferty et al. 2004). That is, consumers who like a brand (vs. do not like) are more likely to approve of that brand's CSR efforts. Additionally, when a cause is personally relevant to consumers, they react more positively to brands that partner with that cause (Gupta and Pirsch 2006). A brand's perceived motivations (e.g., profit-motivation, self-serving motivations) to form a partnership also play an important role in consumer responses (e.g., Becker-Olsen et al. 2006; Mohr, Webb, and Harris 2001). Specifically, research showed that consumers responded less positively when a brand's

stated motivations for joining a cause-brand alliance differed from the consumers' perceived motivations (Forehand and Grier 2003).

Perhaps the most critical determinant of cause-brand alliance success is cause-brand fit, which is the perception of congruence “between the cause and the brand in terms of the mission, attributes, concepts, and any other associations that a consumer has with the cause and the brand,” (Myers and Kwon 2013, p. 77). The current conceptualization of fit is built from associative network theory, which states that concepts are interconnected in a consumer's mind and that the strength of the component links in the resulting network is variable (Anderson 1983). When a construct is encountered, related schema (i.e., connected links) surrounding the construct may be activated depending on the a-priori link strength between the schema and the construct. As consumers become familiar with a brand, they construct brand associative networks in memory that guide behavior and judgments (Keller 1993). When consumers assess a cause-brand alliance, schemas surrounding both the cause and the brand are activated. To the extent that schemas are congruent, perceived fit will be high (Anderson and Bower 1973; Mandler 1982).

Cause-brand alliance fit can take various forms. Fit can be perceptual, which refers to observable attributes such as color or location of the sponsor (Kuo and Rice 2015; Zdravkovic, Magnusson, and Stanley 2010). For example, Coca-Cola and the Product Red campaign are perceived to have high perceptual fit (and benefit accordingly) because they both prominently use the color red. Most research on fit, however, assesses conceptual congruence, which refers to attributes such as brand image or corporate values (Sen, Du, and Bhattacharya 2016). High conceptual congruence occurs when a brand and a nonprofit share a highly accessible association (e.g., Alpo and the Humane Society both relate to pets; Simmons and Becker-Olsen 2006).

Fostering conceptual congruence can be challenging since for-profit companies and nonprofit brands often focus on different core associations, with non-profits more focused on warmth and for-profits more focused on competence (Aaker, Vohs, and Mogilner 2010). Brand personality traits also often differ between for-profits and nonprofits. Whereas for-profit brands often focus on personality traits like ruggedness and excitement (Aaker 1997), nonprofits regularly focus on compassion, reputability, and kindness (Venable et al. 2005).

Despite these differences in association tendencies, for-profit companies and nonprofits can both be associated with brand archetypes and archetype match is a heretofore unstudied driver of cause-brand fit. For example, a brand identifying with the Caregiver archetype should have a stronger fit with the American Red Cross than should a brand identifying with the Outlaw. Similarly, the Joy in Childhood Foundation's mission is "to provide the simple joys of childhood to kids battling hunger or illness." This goal aligns with the Jester archetype, whose desire is to enjoy life, lighten up the world, and give joy to everyone. As a result, brands that also embrace the Jester archetype may be well suited to a partnership with the Joy in Childhood Foundation. Although not a focus of this research, I note that archetype-based personas could contribute to both conceptual and perceptual congruency. The brand image aspect of archetype-driven personas can influence perceptions of conceptual congruency, while the visual component (e.g., anthropomorphic character, spokesperson) can affect perceptions of perceptual congruency. Rather than differentiating between perceptual and conceptual congruence in the current work, I instead investigate the broad effects of archetype-based personas on overall evaluations of cause-brand fit and consumer response. Formally, I propose,

H1: Cause-brand alliance fit will be higher when a brand and cause share a brand archetype.

I next turn to the specific consequences of higher cause-brand alliance fit. Research generally suggests that cause-brand alliance fit is positive (Sen et al. 2016). When CSR initiatives have higher fit, consumers report higher engagement and brand evaluation (Nan and Heo 2007) and are more likely to purchase from the brand (Pracejus and Olsen 2004). In contrast, a lack of congruence leads to less positive attitudes towards both the brand and its partnerships (Forehand and Grier 2003; Menon and Kahn 2003). Brands also experience a larger positive attitude increase when they sponsor events where participants use their product (i.e., user imagery overlap; Gwinner and Eaton 1999).

A big driver of these fit effects is the cue congruity effect, which posits that consistent cues are useful and therefore yield favorable results (Miyazaki et al. 2005). When inconsistent cues are present (i.e., low cause-brand fit), consumers focus their attention on discrepancies and anchor on this negative information (Ahluwalia 2002; Maheswaran and Chaiken 1991). This theorizing is supported in the prosocial domain, as research has shown that cue congruence increases purchase intentions of cause-related products (Das et al. 2016). Overall, I expect that cause-brand alliance fit will have favorable outcomes for both the brand and the cause and test the following hypothesis:

H2: Archetype-based cause-brand fit will have a positive effect on a) brand perceptions and behaviors and b) cause donations and success.

Authenticity

Authenticity summarizes one's assessment of something as "real" or "genuine" (Lehman et al. 2019). As it relates to corporate social responsibility, authenticity refers to perceptions that the brand's CSR activity is being conducted for benevolent reasons as opposed to driven by external obligations or responsibility (Beverland 2005; Price, Arnould, and Tierney 1995). Perceived authenticity is affected by factors such as honesty, sincerity, and perceived brand motives to engage in CSR (O'Connor, Shumate, and Meister 2008). For example, companies are perceived as inauthentic if their goal is to maximize profits or use CSR as a marketing ploy (Alhouti, Johnson, and Holloway 2016). Self-serving motives do not, however, always undermine authenticity. In fact, when companies engage in CSR for both altruistic and self-serving reasons, acknowledging their self-serving motivations can reduce skepticism and thereby improve overall consumer evaluations (Forehand and Grier 2003). In contrast, consumer skepticism increases toward firms that do not acknowledge obvious self-serving benefits that arise from CSR involvement. That is, consumers punish inauthenticity (i.e., lying, deceiving) rather than merely punishing firms for engaging in self-serving CSR actions. Research also supports my proposition that brand personas increase authenticity. Since the motives of CSR engagement are often questioned (Vanhamme and Grobben 2009), the use of social media brand ambassadors (i.e., a type of brand persona) can legitimize a company's CSR behavior (Rim and Song 2016).

Cause-brand fit should also increase authenticity and thereby reduce consumer skepticism around a CSR initiative (Becker-Olsen et al. 2006). Compatibility of a brand's core concepts with those of a cause eases information processing and leads consumers to focus more on

positive (vs. negative) aspects of the CSR activity (Kim and Lee 2020; Pomerantz, Chaiken, and Tordesillas 1995). For example, Home Depot's partnership with Habitat for Humanity confirms consumers' prior expectations, as the two share associations and competencies, resulting in more positive overall evaluations (Becker-Olsen et al. 2006). In contrast, low cause-brand fit invokes greater cognitive elaboration, reducing company credibility and decreasing CSR evaluations (Alcañiz, Cáceres, and Pérez 2010; Becker-Olsen et al. 2006; Speed and Thompson 2000). Importantly, the downstream effects of perceived authenticity on brand evaluations are overwhelmingly positive (e.g., Beverland 2006; Brown, Kozinets, and Sherry 2003; Napoli et al. 2014). Perceived sincerity of a sponsor positively influences interest in and favorability toward the sponsor (Speed and Thompson 2000), and authenticity positively affects a brand's ability to successfully extend into broader categories (Spiggle, Nguyen, and Caravella 2012). Related to the current research, there is some evidence that authenticity between a brand and its CSR initiative mediates the effects of fit on consumer brand attitudes and purchase intentions (Alhouthi et al. 2016; Kim and Lee 2020).

I extend prior research on cause-brand authenticity in two ways. First, I predict that archetype-based brand personas can effectively convey cause-brand fit and increase perceived authenticity. Second, existing literature on CSR authenticity focuses on brand outcomes (e.g., brand attitude, brand boycott). Although I expect similarly positive results, I extend prior work by investigating the effects of perceived authenticity on cause-specific outcomes (e.g., donation likelihood, donation amount). Formally,

H3: Perceived cause-brand alliance authenticity will mediate the effect of archetype-based cause-brand fit on brand and cause outcomes.

Self-Brand Congruity

Self-brand congruity (SBC) describes the perceived similarity between a consumers' view of themselves and their perception of a brand (Rifon et al. 2004; Jeong and Kim 2020). Many factors influence SBC, including brand personality traits, values, and country-of-origin (Bhattacharya and Sen 2003; Fournier 1998; Sirgy 1982). Brand personas are identity communicators with whom consumers can readily assess self-brand congruence. As it relates to CSR, self-brand congruence arises from aligned values and norms (Beverland and Farrelly 2010; Leigh, Peters, and Shelton 2006). Among the many positive effects, higher SBC leads to greater brand loyalty, more positive evaluations of a brand, higher propensity to spread word-of-mouth recommendations, and resilience to negative information (Bhattacharya and Sen 2003; Edson Escalas 2004).

Across literatures, an abundance of research shows self-congruence to be an important factor in determining authenticity (e.g., Fritz, Schoenmueller, and Bruhn 2017; Kraus, Chen, and Keltner 2011). In sociology, for example, self-consistency increases perceptions of authenticity in other humans (Goffman 1959). In marketing, research found that when fit between brand communication and consumer self-perception was high (vs. low), brand authenticity increased, which increased emotional brand attachment (Malär et al. 2011). Authenticity is an anthropomorphic (i.e., human-based) attribute that humans have valued for centuries (Goffman 1959; Grayson and Martinec 2004), and work has also shown that self-brand congruity increases perceptions of anthropomorphic attributes. For example, Guido and Peluso (2015) showed that when consumers see more of themselves in a brand (i.e., high self-brand congruity), they more strongly identified with the brand and were more likely to use personality terms to describe the

brand. Further, Jeong and Kim (2020) showed that self-brand congruity increased social connections and subsequently perceptions of warmth. This positive influence of self-brand congruity on other anthropomorphic attributes (e.g., increased use of personality terms to describe the brand) suggests I should also observe a positive relationship between self-brand congruity and brand authenticity.

Given that people focus more on items that are self-relevant (vs. neutral; Greenwald 1980) and self-relevant information is more easily processed and retrieved (Higgins and King 1981; Markus and Wurf 1987), when a consumer perceives him- or herself to be similar to a brand, their attention to and evaluation of the brand increases. In contrast, when a brand is not congruent with the self, consumers pay less attention to the brand, and perception of the brand is less pertinent to them. As it relates to this research, consumers with high (vs. low) self-brand congruity should scrutinize the cause-brand alliance more closely. Those who do not perceive similarity between themselves and the brand may not spend enough time considering the cause-brand alliance to see the brand persona fit. Ultimately, those with high self-brand congruence have more knowledge about the brand against which they can judge authenticity.

Bringing together the literature on self-brand congruity, authenticity, and cause-brand fit, I propose that high archetype-based cause-brand fit will increase perceptions of authenticity for consumers who perceive high (vs. low) self-congruity with the brand (see Figure 4 for conceptual model). Formally,

H4: Self-brand congruity will moderate the effect of archetype-based cause-brand fit on perceived authenticity such that the positive effect will only be evident for those with a high (vs. low) degree of self-brand congruity.

INSERT FIGURE 4 ABOUT HERE

I test my proposed conceptual model in four studies. Study 1 examines the benefit of archetype fit to nonprofit organizations. I show that causes benefit from partnering with brands that share a brand archetype, even if other dimensions of fit (e.g., product features, relevant firm experience, user imagery, and technical expertise) do not overlap. In Study 2, I assess the mediating effect of perceived brand authenticity. Finally, in Studies 3 and 4, I test the moderating effect of self-brand congruity on perceived authenticity to further illustrate the process of the effects of cause-brand fit. To develop appropriate stimuli for these studies, I conducted three pretests. First, in Pretest 1 I identify pairs of brands from the same product category, such that only one of the two brands is strongly associated with an archetype. Then, in Pretest 2 I verify that three proposed fictitious nonprofits are highly representative of the brand archetypes identified in the first pretest. Finally, Pretest 3 ensures the proposed nonprofit is equally aligned with the brands from the first pretest on commonly assessed dimensions of fit.

PRETEST 1 – DETERMINING ARCHETYPE-REPRESENTATIVE AND ARCHETYPE-NONREPRESENTATIVE BRANDS

Participants and Procedure

Participants were 148 adults from Amazon Mechanical Turk (MTurk) ($M = 35.2$ years, 45.3% female). First, participants saw the definition of a brand archetype (see Appendix). Next, each participant was randomly assigned to one of three archetypes (Explorer, Jester, and Creator) and rated how well five to seven brands (in the same product category) fit with that archetype (1

= *Extremely bad fit*, 6 = *Extremely good fit*). Those who saw the Explorer rated Jeep, Hyundai, Nissan, Toyota, and Ferrari. Those who saw the Jester rated Skittles, Milk Duds, Hershey's, Crunch Bar, M&Ms, Coca-Cola, and Ghirardelli. Those who saw the Creator rated LEGO, Nerf, Fisher Price, and Barbie. Participants could also state they were unfamiliar with a brand. Participants completed the same procedure for two randomly assigned archetypes.

Results and Discussion

For each archetype, I conducted a repeated measures ANOVA with the brands from the product category of interest (e.g., candy for Jester). For the Jester archetype, I observed a significant main effect difference between brands ($F(5, 270) = 16.22, p < .001$). I predicted that Skittles would be the strongest representation of the Jester archetype. Thus, I conducted planned contrasts of each brand against Skittles. Skittles ($M = 4.88$) was perceived as a significantly better fit with the Jester archetype than any other brand (Crunch Bar: $M = 4.20, F(1, 54) = 4.10, p = .003$; Ghirardelli: $M = 3.34, F(1, 54) = 41.23, p < .001$; Hershey's: $M = 4.30, F(1, 54) = 8.57, p = .005$; Milk Duds: $M = 4.05, F(1, 54) = 11.84, p = .001$) except M&Ms ($M = 4.82; F(1, 54) = .39, p = .54$). After further consideration, I decided that Ghirardelli was *luxury chocolate* rather than *candy* (i.e., a different product category). Therefore, for the Jester archetype, I chose Skittles as the archetype-representative brand and Milk Duds as the archetype-nonrepresentative brand.

Next, a repeated measures ANOVA for the Explorer archetype revealed a significant effect of brand ($F(4, 232) = 14.65, p < .001$). A priori, I predicted Jeep to be most representative of the Explorer archetype. Planned contrasts revealed Jeep ($M = 5.15$) to be significantly more representative of the Explorer archetype than the other car brands (Ferrari: $M = 3.93, F(1, 58) =$

20.52, $p < .001$; Hyundai: $M = 3.77$, $F(1, 58) = 30.60$, $p < .001$; Nissan: $M = 3.57$, $F(1, 58) = 39.40$, $p < .001$; Toyota: $M = 3.83$, $F(1, 58) = 31.43$, $p < .001$). Based on these results, for the Explorer archetype, I chose Jeep as the archetype-representative brand and Nissan as the archetype-nonrepresentative brand.

Finally, I conducted a repeated measures ANOVA for the Creator archetype, which revealed a significant effect of brand ($F(3, 156) = 25.10$, $p < .001$). I predicted that LEGO would be the most representative brand of the Creator archetype, which I tested using planned contrasts. The planned contrasts revealed that LEGO ($M = 5.21$) was significantly more representative of the Creator archetype than Barbie ($M = 3.73$, $F(1, 52) = 54.07$, $p < .001$), Nerf ($M = 3.77$, $F(1, 52) = 42.88$, $p < .001$), and Fisher Price ($M = 4.45$, $F(1, 52) = 24.60$, $p < .001$). Thus, for the Creator archetype, I chose LEGO as the archetype-representative brand and Nerf as the archetype-nonrepresentative brand.

PRETEST 2 – CAUSE-ARCHETYPE FIT

Next, I created three fictitious nonprofits, one to be representative of each Explorer, Jester, and Creator archetype. The goal of Pretest 2 is to ensure each nonprofit is seen as highly representative of its archetype.

Participants and Procedure

Participants were 50 U.S. adults ($M = 40.3$ years, 50% female) from MTurk. All participants read a description of brand archetypes (see Appendix). Next, participants read the description of one brand archetype (Jester, Explorer, Creator) and the description of a matched

fictitious nonprofit: Discovery Air and Space Museum for the Explorer, Senior Juggling Center for the Jester, and Young Entrepreneur Council for the Creator (full descriptions in the Appendix). Participants reported how well these fictitious nonprofits fit with the respective archetype on 7-point scales (*Low fit/high fit, Dissimilar/Similar, Inconsistent/Consistent, Not representative at all/Extremely representative*).

Results and Discussion

The four fit items loaded onto one factor ($\lambda = .97$) so I created one fit variable. Three one-sample t-tests (against the midpoint of 4) indicated that each nonprofit was seen as highly representative of the archetype for which they were created. The Senior Juggling Center was highly representative of the Jester ($M = 5.49, SD = 1.45, t(49) = 7.23, p < .001$), the Discovery Air and Space Museum was highly representative of the Explorer ($M = 5.88, SD = 1.14, t(49) = 11.60, p < .001$), and the Young Entrepreneur Council was highly representative of the Creator ($M = 5.64, SD = 1.35, t(49) = 8.59, p < .001$).

PRETEST 3 – NONPROFIT FIT WITH BRANDS

In Pretest 3, I assess the relation of the nonprofits (Pretest 2) to the pair of brands determined by Pretest 1 on commonly used dimensions of fit. The goal is to ensure the potential nonprofits align equally with both brands on commonly used dimensions of fit such that archetype match would be the only salient source of fit.

Participants and Procedure

Participants were 205 U.S. adults ($M = 46.0$ years, 52.5% female) from MTurk. Participants were randomly assigned to view one of the three nonprofit organizations (Discovery Air and Space Museum, Senior Juggling Center, or Young Entrepreneur Council) and were randomly assigned to see it paired with either the archetype-representative brand or the archetype-nonrepresentative brand. Participants responded to four questions assessing the fit between the typical consumer, product features, relevant firm experience, and technical expertise of the brand and the nonprofit (assessed on 7-point scales, items in Appendix).

Results and Discussion

Even though the four fit items loaded onto one factor ($\alpha = .90$), it was important that the two brands did not differ on any item. For each nonprofit, I conducted a between-subjects ANOVA comparing fit of the nonprofit with each brand on all four fit measures. There were no significant differences between the target brands and their associated nonprofit for any of the four fit items (see Table 6). As such, I cannot reject the null hypothesis that either brand is a better fit with their archetype-associated nonprofit on overlap of typical consumers, product features, relevant firm experience, and technical expertise.

INSERT TABLE 6 ABOUT HERE

I also compared each brand against the midpoint (4) to assess overall fit (average of the four items). The fit of Skittles with the Senior Centers' Juggling Therapy was marginally significantly below the midpoint ($M = 3.42$, $t(31) = -1.80$, $p = .082$), and Milk Duds was significantly below the midpoint ($M = 3.16$, $t(33) = -3.10$, $p = .004$). The fit of Jeep ($M = 4.20$, $t(30) = .80$, $p = .43$) and Nissan ($M = 4.24$, $t(35) = 1.10$, $p = .28$) with the Discovery Air and Space Museum were both non-significantly above the midpoint. The fit of both LEGO and NERF with the Young Entrepreneur Council were significantly above the midpoint, ($M_{LEGO} = 4.79$, $t(35) = 3.57$, $p = .001$; $M_{NERF} = 4.86$, $t(35) = 3.09$, $p = .004$).

The pretests ensured the brands and nonprofit stimuli isolate the effects of brand archetype-driven cause-brand fit. In Pretest 1, I identified brand pairs for three archetypes (Explorer, Jester, and Creator). In each brand pair, one brand is highly representative of the archetype, while the other brand is highly nonrepresentative of that same archetype. Pretest 2 confirmed that the fictitious nonprofits were also highly representative of the archetype for which they were created. Specifically, the Senior Juggling Center is highly representative of the Jester, the Discovery Air and Space Museum is highly representative of the Explorer, and the Young Entrepreneur Council is highly representative of the Creator. Pretest 3 showed that the fictitious nonprofits had equivalent overlap with both target brands on commonly used dimensions of fit (typical consumers, product features, relevant firm experience, and technical expertise). Although it is technically impossible to assess all alternative sources of potential fit, the equivalence of the fit results on these prominent dimensions suggests that any observed effects of brand manipulation in Study 1 are likely attributable to brand-archetype overlap between the brand and cause.

STUDY 1 – ARCHETYPE-BASED CAUSE-BRAND FIT

Study 1 serves as an initial test of my main hypothesis that archetype overlap between the brand and the cause will influence consumer responses to cause-brand alliances even when other potential sources of fit (typical consumers, product features, relevant firm experience, and technical expertise) are held constant.

Participants and Procedure

Participants were 97 undergraduate students ($M = 20.6$ years, 63.3% female) completing the study in exchange for partial course credit. Participants were told they would be assessing new potential nonprofit partnerships. They answered all questions for one of three randomly assigned nonprofits (Senior Juggling Center, Air and Space Museum, or Young Entrepreneur Council) before moving to the next partnership. Each participant first read a description of the nonprofit (see Appendix). Next, they rated two items assessing how successful they thought the alliance would be when the nonprofit paired with 1) the archetype-representative brand (High Cause-Brand Fit (HighCBF)) and 2) the archetype-nonrepresentative brand (Low Cause-Brand Fit (LowCBF)) (1 = *Not successful at all*, 7 = *Extremely successful*). They also reported which brand would be more successful as a partner with the nonprofit (0 = *HighCBF brand*, 1 = *LowCBF brand*; order randomized). Participants then saw both the High and Low cause-brand fit alliances and reported which of the two partnerships they would donate to (0 = *HighCBF brand alliance*, 1 = *LowCBF brand alliance*; order randomized). They also responded to two items asking how likely they would be to donate to the nonprofit if the 1) HighCBF brand and 2) LowCBF brand partnered with the nonprofit (1 = *Extremely unlikely*, 7 = *Extremely likely*). Next,

participants reported how well the HighCBF [LowCBF] brand fit with the nonprofit (1 = *Does not fit at all*, 7 = *Fits extremely well*). Finally, participants reported how representative each nonprofit was with the predetermined matched archetype (e.g., Jester – Senior Juggling Center; 1 = *Not representative at all*, 7 = *Extremely representative*).

Results and Discussion

First, I conducted a 2 (Fit: high, low) \times 3 (Archetype: Jester, Explorer, Creator) fully within-subjects repeated-measures ANOVA on fit of the brand with the nonprofit. Results showed a main effect of archetype, ($M_{\text{jester}} = 3.34$, $SD = 1.61$; $M_{\text{explorer}} = 3.71$, $SD = 1.49$; $M_{\text{creator}} = 3.97$, $SD = 1.33$; $F(2, 192) = 11.56$, $p < .001$, $\eta^2 = .11$). Importantly, participants perceived significantly greater fit between the nonprofit and the HighCBF brand ($M = 4.09$, $SD = 1.52$) than with the LowCBF brand ($M = 3.25$, $SD = 1.44$; $F(1, 96) = 54.75$, $p < .001$, $\eta^2 = .36$), supporting hypothesis 1. There was also a significant interaction between archetype and fit, ($F(2, 192) = 9.30$, $p < .001$, $\eta^2 = .09$). Within each archetype, simple contrasts between high- and low-fit conditions were significant (Jester: $F(1, 96) = 4.65$, $p = .034$, $\eta^2 = .05$; Explorer ($F(1, 96) = 8.87$, $p = .004$, $\eta^2 = .09$) and Creator ($F(1, 96) = 72.19$, $p < .001$, $\eta^2 = .43$). Since Pretest 2 ruled out differences in fit being attributed to user imagery, technical expertise, relevant firm experience, or product features, I attribute the greater perceived fit to the shared underlying archetype of the nonprofit and the brand. Indeed, I also asked how representative each nonprofit was of its paired archetype and observed support for this argument. Across conditions, the average representativeness of the nonprofit with its matched archetype was significantly higher than the midpoint of four ($M = 5.64$, $SD = 1.34$; $t(290) = 20.85$, $p < .001$).

Next, I tested which of the two brands participants thought would be more successful as a partner with the nonprofit. Using a binomial test with 50% as the hypothesized proportion, I found support for hypothesis 2, in that participants were significantly more likely to choose the archetype-matched (HighCBF) brand as more likely to be successful (72.5%) than the not-archetype-matched (LowCBF) brand (27.5%; 95% CI: 67.0% – 77.6%, $p < .001$). A 2 (cause-brand fit) \times 3 (archetype) within-subjects repeated-measures ANOVA on perceived success of the cause with each brand (high and low CBF) supported the findings from the dichotomous choice question. Participants thought the nonprofit paired with the HighCBF brand would be significantly more successful ($M = 4.24$, $SD = 1.50$) than the nonprofit paired with the LowCBF brand ($M = 3.50$, $SD = 1.42$; $F(1, 96) = 44.79$, $p < .001$, $\eta^2 = .32$). See Figure 5 for results. Additionally, the effect of archetype on perceived success was significant, ($F(2, 192) = 16.93$, $p < .001$, $\eta^2 = .15$), as was the interaction between archetype and fit, ($F(2, 192) = 9.74$, $p < .001$, $\eta^2 = .09$). Finally, we looked at the simple contrast between high- and low-fit brands in each archetype. The simple contrasts were significant for Explorer ($F(1, 96) = 10.23$, $p = .002$, $\eta^2 = .10$) and Creator ($F(1, 96) = 63.29$, $p < .001$, $\eta^2 = .40$), but nonsignificant for Jester ($F(1, 96) = 1.00$, $p = .32$).

INSERT FIGURE 5 ABOUT HERE

Next, I examined donation intentions. Using a binomial test with 50% as the hypothesized proportion of a dichotomous donation variable, significantly more participants indicated that they would donate to the HighCBF brand partnership (72.5%) than the LowCBF brand partnership (27.5%; 95% CI: 67.0% – 77.6%, $p < .001$). In further support of hypothesis 2,

a within-subjects repeated measures ANOVA showed participants were more likely to make a donation when the nonprofit partnered with the HighCBF brand ($M = 3.32$, $SD = 1.59$) than the LowCBF brand ($M = 2.82$, $SD = 1.48$; $F(1, 96) = 24.81$, $p < .001$, $\eta^2 = .21$). See Figure 6 for results. The main effect of archetype was also significant ($F(2, 192) = 6.58$, $p = .002$, $\eta^2 = .06$), and the interaction between archetype and cause-brand fit was marginally significant, ($F(2, 192) = 2.56$, $p = .08$, $\eta^2 = .03$). The simple contrast between high and low cause-brand fit were significant for all three archetypes (Jester: ($F(1, 96) = 7.38$, $p = .008$, $\eta^2 = .07$; Explorer: $F(1, 96) = 5.97$, $p = .016$, $\eta^2 = .06$; Creator: $F(1, 96) = 20.41$, $p < .001$, $\eta^2 = .18$).

INSERT FIGURE 6 ABOUT HERE

Study 1 provided evidence that archetype fit exists between a company and a sponsored initiative. Specifically, I observed higher fit between a brand when it partnered with a cause that shared an archetype (vs. no shared archetype). Prior research has shown that brand expertise in the nonprofit domain or overlapping target markets influence perceived congruity (Haley 1996). However, a pretest showed that there were no differences on fit between brands for either of those factors, as well as no differences on relevant firm experience or shared product features. As a result, this greater perceived fit appears to be from a shared archetype. Further, persona-based cause-brand fit influenced how successful participants thought the partnership would be. When cause-brand fit was high (vs. low), participants thought the partnership was more likely to be successful and they were more likely to make a donation to the partnership.

Study 1 had some limitations I address in Study 2. Specifically, Study 1 utilized a within-subjects design, which could have prompted participants to pay greater attention to archetype-

based cause-brand fit. To eliminate this concern, future studies employ between-subjects designs. Further, in Study 2, I test my predicted process through which archetype-based cause-brand fit influences cause and brand outcomes. Specifically, hypothesis 3 predicts that archetype-based cause-brand fit will lead to higher perceived authenticity, thereby increasing positive responses to both the brand and the cause.

STUDY 2 – THE MEDIATING ROLE OF PERCEIVED AUTHENTICITY

Study 1 presented evidence that archetype fit predicts CSR success for both the brand and the nonprofit. Specifically, people thought the partnership would be more successful and they would be more likely to donate when archetype-based cause-brand fit was high. In Study 2 I test the hypothesis that perceived authenticity is the process through which archetype-based cause-brand fit affects nonprofit and brand outcomes. I also make two important changes. In Study 1, the questions regarding success and donations could be construed as measuring the success of the partnership rather than the brand or the cause separately. For example, I asked “If [Brand] partnered with [nonprofit], how likely would you be to make a donation?” Although I assumed the donation would be directly to the nonprofit, consumers may feel that purchasing more of the product would be an indirect donation. To clarify benefits to both entities, in Study 2, I more explicitly differentiate questions about the brand and the cause. Second, whereas in Study 1 the nonprofit was the same and I tested two different brands, in Study 2 I keep the brand constant and vary the nonprofit.

Although Study 2 uses the same nonprofits from Study 1, pretests did not assess fit between two nonprofits with the same brand. Therefore, before continuing, I conducted a pretest to ensure that the nonprofits used in Study 2 did not differ from the target brand, Skittles, on

commonly assessed dimensions of fit. Seventy participants were recruited from Amazon's MTurk. Participants were randomly assigned to read about one of two nonprofits: a Senior Juggling Center or a Discovery Air and Space Museum (see Appendix for full descriptions). Next, they answered the four fit items from Pretest 2 assessing how well each nonprofit fit with the brand, Skittles. A between-subjects ANOVA revealed no difference in fit between the Senior Juggling Center and the Discovery Air and Space Museum on relevant firm experience ($M_{\text{juggling}} = 2.74$, $M_{\text{airspace}} = 2.62$; $F(1, 69) = .08$, $p = .77$), shared product features ($M_{\text{juggling}} = 3.48$, $M_{\text{airspace}} = 3.54$; $F(1, 69) = .01$, $p = .91$), or technical expertise ($M_{\text{juggling}} = 3.19$, $M_{\text{airspace}} = 2.64$; $F(1, 69) = 1.62$, $p = .21$). Although there was a significant difference in perceptions of the typical consumer ($M_{\text{juggling}} = 2.81$, $M_{\text{airspace}} = 4.10$; $F(1, 69) = 7.46$, $p = .008$), perceptions of fit were higher between Skittles and the Discovery Air and Space Museum than between Skittles and the Senior Juggling Center. Given that Senior Juggling Center is the archetype-match cause with Skittles, the high fit between Skittles and the Museum on typical consumer would work against the core archetype fit predictions.

Participants and Procedure

Participants were 211 undergraduate students ($M = 20.7$ years, 45.3% female) who participated in exchange for partial course credit. The experimental design was a 2 (Cause-brand fit: high vs. low) between-subjects design. Each participant was randomly assigned to read about one of two new nonprofit organizations that Skittles was looking to partner with: a Senior Juggling Center (HighCBF) or a Discovery Air and Space Museum (LowCBF). Participants first rated fit on a 7-point 4-item semantic differential scale (*Low fit/high fit*, *Dissimilar/Similar*,

Inconsistent/Consistent, Not complementary/Complementary). Next, participants rated the authenticity of the CSR partnership on an eight-item scale adapted from Alhouti et al. (2016). Authenticity items included “The company’s nonprofit partnership is genuine,” and “The company is standing up for what it believes in.” Participants stated their agreement on 7-point scales (1 = *Strongly disagree*, 7 = *Strongly agree*). As outcome measures, participants rated their attitude towards the brand (*Unfavorable/Favorable, Bad/Good*), brand purchase intentions (*Unlikely/Likely, Improbable/Probable*), measured on 7-point scales, and how much they would be willing to pay for a bag of Skittles, knowing that the brand had partnered with the HighCBF [LowCBF] cause (*\$0-\$10 sliding scale*). Cause outcomes included how successful the participant thought the nonprofit would be with Skittles as a partner (1 = *Extremely unsuccessful*, 7 = *Extremely successful*), how likely the participant would be to donate to the nonprofit (*Unlikely/Likely, Improbable/Probable*), and how much they would donate to the nonprofit in a one-time donation (*open-ended*). Finally, participants reported how well the nonprofit fit with the Jester archetype on three 7-point scales (*Low fit/High fit, Dissimilar/Similar, Inconsistent/Consistent*). Full measures and manipulations are in the Appendix.

Results and Discussion

Fit Perceptions. First, supporting hypothesis 1, a oneway, between-subjects ANOVA revealed that the fit between Skittles and the nonprofit was higher for the Senior Juggling Center ($M = 2.83$, $SD = 1.45$) than for the Discovery Air and Space Museum ($M = 2.44$, $SD = 1.19$; $F(1, 209) = 4.57$, $p = .034$, $\eta^2 = .02$). Again, since a pretest showed these nonprofits did not differ from each other on their level of fit with Skittles regarding technical expertise, relevant firm

experience, and product features (and was in the opposite direction for typical user), I attribute perceptions of fit between the nonprofit and Skittles to an archetype match. Indeed, a oneway between-subjects ANOVA confirmed that the Senior Juggling Center was a stronger fit with the Jester archetype ($M = 4.95$, $SD = 1.49$) than was the Discovery Air and Space Museum ($M = 3.43$, $SD = 1.53$; $F(1, 209) = 53.32$, $p < .001$, $\eta^2 = .20$).

Mediation Model. Next, I conducted a mediation analysis using PROCESS (Model 4; Hayes 2017) to assess the effect of archetype-based cause-brand fit on purchase intentions of and attitude towards Skittles through perceived authenticity. Supporting hypothesis 3, I found a significant indirect effect of fit on both brand purchase intentions ($b = .19$, $SE = .05$, 95% CI: .11, .29) and brand attitude ($b = .19$, $SE = .03$, 95% CI: .13, .26) through perceived authenticity. In addition to purchase intentions, I also found that participants were willing to pay more for a bag of Skittles when they were partnered with a brand with high archetype-based cause-brand fit ($b = .12$, $SE = .04$, 95% CI: .05, .22). See Figure 7 for mediation models.

INSERT FIGURE 7 ABOUT HERE

Next, I examined the effect of archetype-based cause-brand fit through perceived authenticity on cause outcomes. I again conducted a mediation analysis using PROCESS (Model 4; Hayes 2017). Supporting hypothesis 3, the indirect effect of fit through authenticity on 1) perceived cause success ($b = .15$, $SE = .04$, 95% CI: .08, .23), 2) donation likelihood ($b = .16$, $SE = .04$, 95% CI: .08, .25), and 3) one-time donation amount ($b = 2.21$, $SE = 1.29$, 95% CI: .29, 5.17) was significant. See Figure 8 for mediation models.

INSERT FIGURE 8 ABOUT HERE

Study 2 presents several noteworthy findings. First, I replicate the main effect of Study 1, showing that archetype match can drive cause-brand fit perceptions and increase donation likelihood (H1). Second, I extend my findings by showing that cause-brand fit increases perceptions of authenticity, which increases brand attitude, brand purchase intentions, willingness to pay for product, cause success, donation likelihood, and one-time donation amount (H3). Notably, both nonprofit organizations were perceived to have rather low fit with Skittles. Even though Skittles was not a close overall fit with either cause, I observed more positive consumer responses when they partnered with an archetype-matched (vs. archetype-not-matched) brand, further illustrating potential benefits of using archetypes as a basis of congruity.

STUDY 3 – THE MODERATING EFFECT OF SELF-BRAND CONGRUITY ON PERCEIVED AUTHENTICITY

In Study 2, I showed that cause-brand alliance fit influenced brand and nonprofit outcomes by increasing perceived authenticity. In Study 3, I examine the effects of self-brand congruity as a moderator of the first leg of the model. I hypothesized that consumers who have higher self-brand congruity will pay more attention to the brand and thus be more likely to assess and observe archetype-based cause-brand fit. In contrast, consumers with low self-brand congruity will have less interest in the brand, as it is not self-relevant. As such, they may not spend enough time assessing any potential dimensions of cause-brand fit, thereby eliminating any positive boost the brand may receive from a cause-brand archetype match. In Study 3, I used a similar design as in Study 2 and manipulated cause-brand fit as in Study 1.

Participants and Procedures

Participants were 404 U.S. adults ($M = 40.9$ years, 48.9% female) who participated in exchange for a nominal fee. Nine subjects who were unfamiliar with the brand were removed, leaving 395 subjects. The experimental design was a 2 (Cause-brand fit: high vs. low) between-subjects design. Participants were randomly assigned to read about a nonprofit (Young Entrepreneur Council) that LEGO [HighCBF] or NERF [LowCBF] was partnering with to run a social marketing campaign. The Young Entrepreneur Council's mission is to "help young entrepreneurs get their businesses started and keep them running." Pretest 2 found the Young Entrepreneur Council to be highly representative of the Creator archetype (i.e., LEGO match) and Pretest 3 showed that the Young Entrepreneur Council nonprofit did not exhibit differential fit with LEGO and NERF on typical user, product features, relevant firm experience, or technical expertise.

Next, I measured perceived brand authenticity using the scale from Study 2. As outcome variables, I measured brand attitude (*Negative-Positive; Unfavorable-Favorable; Bad-Good*) and donation intentions (*Unlikely-Likely; Improbable-Probable*) on 7-point scales. Finally, I asked participants to rate how congruent the brand was with their actual and ideal self and social images (e.g., "The [brand] is congruent with the image I hold of myself," 1 = *Strongly disagree*, 7 = *Strongly Agree*; Guido and Peluso 2015). All items were measured on 7-point scales.

Results and Discussion

First, I regressed perceived authenticity on self-brand congruity, the dummy-coded match variable (0 = low cause-brand fit, 1 = high cause-brand fit), and the two-way interaction term. Results indicated a significant two-way interaction, ($\beta = .11$, $t(391) = 2.04$, $p = .042$). To probe the interaction, I used floodlight analyses to test the effect of cause-brand fit across self-brand congruity (see Figure 9). As expected, presence of a high cause-brand fit effectively increased perceived authenticity perceptions for participants at self-brand congruity scores above 4.97, ($\beta_{JN} = 4.97$, $t(391) = 1.97$, $p = .05$). Thus, assessing a cause-brand alliance with an archetype match increased perceived authenticity for those with higher self-brand congruence, whereas no such effect was found for those with lower self-brand congruence.

INSERT FIGURE 9 ABOUT HERE

Next, to assess whether these changes in perceived authenticity led to changes in downstream brand evaluations and donation intentions, I conducted conditional process analyses to examine whether the effect of cause-brand fit on brand attitude and donation intentions through perceived authenticity is conditional upon one's self-brand congruence. I used the PROCESS macro (Model 8; Hayes 2017) using a bootstrap procedure (5,000 draws) to construct bias-corrected confidence intervals. Results from this analysis suggest support for the hypothesized model. Supporting hypothesis 4, for consumers with high self-brand congruity (+1 SD), results indicated a significant indirect effect ($\beta_{Attbrand} = .20$, 95% CI = [.06, .37]). That is, cause-brand alliance archetype match led to higher perceptions of authenticity for those with

high self-brand congruity, which led to more positive brand attitude. I found the same pattern of effects for participants' donation intentions ($\beta_{DI} = .09$, 95% CI = [.01, .20]). Further, there was no change in perceived authenticity depending on cause-brand fit for those with low self-brand congruity (-1 SD). However, the indirect effect of the highest-order interaction (cause-brand fit \times self-brand congruity) through perceived authenticity for each dependent variable contained zero ($B_{Attbrand} = .09$, 95% CI = [-.02, .22]; $B_{DI} = .04$, 95% CI = [-.008, .11]), so I cannot conclude that the indirect effects are significantly different from each other.

Study 3 found marginal support for my theorized predictions in that I observed a significant interaction between cause-brand fit and self-brand congruity on perceived authenticity. Specifically, the effect of archetype-based cause-brand fit on perceived authenticity was higher only for participants with high (vs. low) self-brand congruity. When looking at the full moderated mediation model, however, the results were not significant. Although the indirect effect from archetype-based cause-brand fit to brand attitude (and donation intentions) through perceived authenticity was positive and significant for those with high self-brand congruity (as predicted), the index of moderation mediation contained zero. One reason for the lack of significance in the full model could be that archetype-based cause-brand fit is rather subtle. It is encouraging that I observed a significant effect between fit and SBC on authenticity, but as further test of theory, I use a stronger manipulation in Study 4.

STUDY 4 – SELF-BRAND CONGRUITY’S MODERATING EFFECT OF OVERALL FIT ON PERCEIVED AUTHENTICITY

Study 3 presented intriguing results that marginally support my theory. To test the full moderated mediation model, in Study 4 I utilize a stronger manipulation of fit. Importantly, I note that this manipulation of fit goes beyond solely archetype-based fit. That is, instead of limiting fit to just archetype match, I also ensure the causes differ on typical user, product features, relevant firm experience, and technical expertise. Although this means any observed effects of fit are not solely attributable to archetype match, doing so allows me to test the overall model and increase the contribution around the understanding of how authenticity and self-brand congruity combine to influence the effects of cause-brand fit on consumer response.

Participants and Procedures

Participants were 186 students ($M = 20.7$ years, 42.7% female) who participated in exchange for partial course credit. The experimental design was a 2 (Cause-brand fit: high vs. low) between-subjects design. Participants were randomly assigned to read about one of two nonprofits that LEGO partnered with to run a social marketing campaign. In the high-cause brand fit condition, participants read that LEGO was partnering with the Young Entrepreneur Council whose mission is to “help young entrepreneurs get their businesses started and keep them running.” In the low cause-brand fit condition, participants read that LEGO was partnering with a Senior Juggling Center that “helps seniors improve or maintain their coordination by hosting fun and interactive juggling classes.” To confirm these nonprofits exhibited significantly

different levels of fit with LEGO, I conducted a pretest using the four fit measures from Pretest 3. This pretest ($N = 71$) confirmed that the Young Entrepreneur Council nonprofit was a significantly higher fit with LEGO than was the Senior Juggling Center on typical consumer ($M_{YEC} = 4.63$, $M_{SJC} = 2.83$; $F(1, 69) = 19.81$, $p < .001$), product features ($M_{YEC} = 4.77$, $M_{SJC} = 3.58$; $F(1, 69) = 9.15$, $p = .003$), relevant firm experience ($M_{YEC} = 5.00$, $M_{SJC} = 2.72$; $F(1, 69) = 36.26$, $p < .001$), and technical expertise ($M_{YEC} = 5.17$, $M_{SJC} = 3.47$; $F(1, 69) = 21.83$, $p < .001$). Next, participants responded to perceived brand authenticity and outcome variables, which were identical to Study 3.

Results and Discussion

First, I regressed perceived authenticity on self-brand congruity, the dummy-coded match variable (0 = low cause-brand fit, 1 = high cause-brand fit), and the two-way interaction term. Results indicated a significant two-way interaction, ($\beta = .25$, $t(182) = 2.25$, $p = .026$). To probe the interaction, I used floodlight analyses to test the effect of cause-brand fit across self-brand congruity (see Figure 10). As expected, presence of a high-fit cause-brand alliance effectively increased perceived authenticity perceptions for participants at self-brand congruity scores above 3.65, ($\beta_{JN} = 3.65$, $t(182) = 1.97$, $p = .05$). Thus, assessing a cause-brand alliance with high overall fit increased perceived authenticity for those with higher self-brand congruence, whereas no such effect was found for those with lower self-brand congruence.

Next, to assess whether these changes in perceived authenticity led to changes in downstream brand evaluations and donation intentions, I conducted conditional process analyses to examine whether the effect of cause-brand fit on brand attitude and donation intentions

through perceived authenticity is conditional upon one's self-brand congruity. I used the PROCESS macro (Model 8; Hayes 2017) using a bootstrap procedure (5,000 draws) to construct bias-corrected confidence intervals. Results from this analysis provided support for the hypothesized model: the indirect effect of the highest-order interaction (cause-brand fit \times self-brand congruity) through perceived authenticity was significant on each dependent variable, as the confidence intervals around the indices of moderated mediation did not contain zero ($B_{\text{Attbrand}} = .17$, 95% CI = [.02, .33]; $B_{\text{DI}} = .17$, 95% CI = [.02, .35]).

INSERT FIGURE 10 ABOUT HERE

I further examined this finding by looking at the indirect effect of cause-brand fit on each dependent variable (brand attitude and donation intentions) through perceived authenticity conditional upon self-brand congruity. For consumers with high self-brand congruity (+1 SD), results indicated a significant indirect effect ($\beta_{\text{Attbrand}} = .44$, 95% CI = [.20, .71]). That is, cause-brand alliance fit led to higher perceptions of authenticity for those with high self-brand congruity, which led to more positive brand attitude. I found the same pattern of effects for participants' donation intentions ($\beta_{\text{DI}} = .17$, 95% CI = [.02, .74]). Further, there was no change in perceived authenticity depending on cause-brand alliance fit for those with low self-brand congruity (-1 SD).

GENERAL DISCUSSION

I combine research on cause-brand fit with recent work on anthropomorphism in corporate social responsibility (Jeong and Kim 2020) to suggest that brand personas are an

unstudied construct by which consumers assess fit and thereby judge cause-brand alliances. Research has shown that CSR initiatives are received more positively when a brand shares expertise with a nonprofit domain or has an overlapping target market that would also benefit from the nonprofit (Haley 1996). In the absence of fit on these measures, prior research would predict an unsuccessful cause-brand alliance. I predict and find, however, that brands also need to consider their brand persona when assessing potential cause-brand alliances.

Specifically, I use a relatively novel marketing technique – brand archetypes – to operationalize brand personas. Twelve brand archetypes are associated with a unique human desire (e.g., Playful – Jester) and convey brand identity (Mark and Pearson 2001). I find support for the overarching prediction that well-defined brand personas can guide CSR decisions. Specifically, consumers will perceive higher cause-brand fit when a brand and a cause share the same archetype. Archetype-based cause-brand fit increases perceived authenticity and in turn, positively influences consumer perceptions of and behaviors towards both the brand and the cause. Study 1 shows a main effect, finding that archetype-based cause-brand fit increases perceived likelihood of success of the alliance and donation intentions when the brand and the cause share an archetype versus when they do not. Study 2 finds support for the predicted process, perceived authenticity. Archetype-based cause-brand fit increases perceived authenticity, which positively influences consumer brand attitude, purchase intentions, and willingness to pay, as well as perceived cause success, donation intentions, and donation amounts. Study 3 finds that self-brand congruity (SBC) moderates the effect of archetype-based cause-brand fit on perceived authenticity. Specifically, cause-brand fit increases perceived authenticity for those with high (vs. low) self-brand congruity. I propose this is because consumers with high SBC have greater brand knowledge and spend more time assessing the

potential cause-brand fit because they care more about the brand than those with low SBC.

However, Study 3 failed to support the overall model wherein self-brand congruity moderated the full indirect effect. This may have been because archetype-match is a more subtle form of fit than dimensions such as product features or user imagery. In Study 4, I use a stronger manipulation of fit (extending beyond archetype-based cause-brand fit) and find support for the conceptual model wherein self-brand congruity moderates the full indirect effect of cause-brand fit on brand and cause outcomes through perceived authenticity.

Practically, my findings suggest that knowledge and implementation of brand personas has important implications for managers. It might seem that corporate social responsibility would be successful for brands that align with archetypes such as the Caregiver, whose underlying human desire is to help others, but unsuccessful for brands that use archetypes with brand concepts not associated with prosociality (e.g., the Ruler and Control). Indeed, research suggests that certain brand concepts may be roadblocks for a successful corporate social responsibility program. Torelli, Monga, and Kaikati (2012) show that brand concepts associated with luxury brands (e.g., dominance) conflict with information about corporate social responsibility (e.g., selflessness), which results in lower evaluations. However, the current research suggests that even luxury brands could increase cause-brand alliance success by emphasizing brand archetype fit, despite their association with other brand concepts seemingly incompatible with CSR.

Prior research suggests that nonprofits are associated with a sense of warmth that is otherwise absent in companies (Aaker et al. 2010). Complementary research finds that brand personas convey a sense of warmth and socialness that make them an effective means by which companies can publicize their corporate social responsibility engagement (Jeong and Kim 2020). The current studies add to research on brand personas in CSR contexts to show that congruency

between a brand and a cause is important beyond simply using a brand persona to advertise CSR initiatives. Based on these findings, I recommend that companies ensure their chosen brand persona aligns with the nonprofits with whom they partner.

Limitations and Future Directions

Our studies have limitations that I believe can inform future research. First, although I used a variety of brands, I did not study brand or product category effects. Future research, for example, could inform whether archetype-based cause-brand fit differs for brands that are primarily hedonic versus utilitarian, or experiential versus search. Additionally, in this paper I only use three of the 12 brand archetypes. Research on cause-brand fit and cue congruity suggest that the effects would obtain for all 12 archetypes, but future research could ensure generalizability and identify brand archetypes that are most successful. Finally, an interesting question is whether brands can emphasize different archetypes to influence perceptions of fit with various causes. This research would suggest a Jester brand would have high fit with a nonprofit associated with playfulness. Perhaps that same brand could run a campaign in which they highlight their transformative nature, thereby increasing fit perceptions with a nonprofit that embodies the Magician archetype. However, advertising multiple brand identities (i.e., archetypes), especially those that differ on key dimensions, may harm the brand in the long run. I conjecture that a slight reframing could work within archetype clusters (Spangenberg 2021, Chapter 1), but may be harmful with more contrasting archetypes. Future research could study whether and when brands benefit from altering their brand archetype.

In closing, I have demonstrated that both brands and nonprofits can benefit from archetype-based cause-brand alliances. Although recent literature finds that anthropomorphism increases the effectiveness of corporate social responsibility messages, research on the effects of anthropomorphism in CSR are sparse. Despite broad personality differences between for-profit and nonprofit companies (Aaker et al. 2010; Venable et al. 2005), all firm types can convey brand identity using brand archetypes. This universality allows me to test and show that archetype-based cause-brand fit effectively increases perceptions of perceived authenticity and, in turn, benefit both parties of a cause-brand alliance.

CHAPTER 3. BRAND ARCHETYPES AS A MEASURE OF BRAND EXTENSION FIT

Brand extensions, or “the use of established brand names to enter new product categories or classes” (Keller and Aaker 1992, p. 35), are an important and prevalent marketing strategy to introduce new products (Tauber 1988). Whereas new brands are expensive to create and often fail (Schneider and Hall 2011), brand extensions leverage a pre-existing brand to capitalize on existing associations (Aaker 1990). The success of a brand extension hinges on consumers’ perceived level of fit between the parent brand and the extension, which allows the parent to provide value to the new offering (Aaker and Keller 1990). Fit can be perceived from a variety of sources, such as product category similarity (Aaker and Keller 1990), complementary positioning of the new brand and the existing brand (Loken and John 1993), and the relevance of parent brand associations to the new category (Broniarczyk and Alba 1994; Park, Milberg, and Lawson 1991). Together, these sources of fit drive the attitudes and behaviors of consumers towards the extension (Czellar 2003).

I propose that companies must also consider the *brand archetype fit* between the company and the potential new product category. Brand archetypes are a relatively novel personification technique used at least in part to reflect brand identity (Ghodeswar 2008; Mark and Pearson 2001). In Jungian psychology, archetypes represent universal patterns of behaviors and motivations (Jung 1938). For example, an archetypal Hero is a brave, courageous warrior who undertakes an arduous task (e.g., rescue mission; Faber and Mayer 2009). Brand archetypes, such as Jeep embodying the Explorer archetype, increase emotional connections and strengthen consumer-brand relationships (MacInnis and Folkes 2017). Well-defined archetypes also guide consistent brand behavior and influence future decisions (e.g., brand extensions; Howard-Spink 2002).

Practically, archetype-as-fit effectiveness can be seen in the marketplace. For example, Jeep introduced a line of hiking shoes. Jeep's primary product (automobiles) shares no product similarity to shoes, and their expertise in automobile design and manufacturing does not obviously transfer to high-quality shoemaking. Further, there is no obvious overlap between typical consumers of shoes and typical Jeep drivers. Existing brand extension research would advise against pursuing a brand extension under these circumstances. However, Jeep's brand archetype, Explorer, desires freedom and adventure, pursuits for which people also could use hiking shoes. Thus, even though existing research would suggest Jeep and shoes are not a strong fit, the extension was successful at least in part because of an underlying archetype fit.

Although brand archetypes are closely related to brand personality (Bechter et al. 2016), research suggests that the relation between the two is not identical (Spangenberg 2021, Chapter 1). Specifically, personality traits are one aspect of a brand archetype, in addition to strong associations with basic human desires, motivations, and goals (Mark and Pearson 2001). Research has shown brand personality (i.e., a subcomponent of brand archetypes) influences affective evaluations of symbolic brand extensions (Ferguson, Lau and Phau 2016; Lau and Phau 2007). Specifically, this work found that brand personality fit influenced brand image fit, which subsequently affected the dilution of brand affect towards the brand (Lau and Phau 2007). Ferguson et al. (2016) also showed that personality fit influenced affective feelings towards brand extensions.

However, both Lau and Phau (2007) and Ferguson et al. (2016) study the effects of personality fit only on symbolic (vs. functional) brands. This focus is not surprising, since people evaluate symbolic brands on their image (Aaker 1996; Keller 1993) and prior work documents the close relation between symbolic brands and consumer personality (Escalas and Bettman

2005; Huang and Mitchell 2014; Huang, Mitchell, Rosenbaum-Elliott 2012). Research has generally not observed an effect of brand personality on functional brands at least in part because functional brand extensions are driven more by physical product similarity (e.g., Aaker and Keller 1990; Boush and Loken 1991).

I argue that personality fit has not been shown to be an effective driver of functional brand extensions because it captures only a single element of a brand persona. In contrast, a brand archetype captures a more complete picture of a brand's persona by communicating broader motivations and desires of a brand (Mark and Pearson 2001). Further, both functional and symbolic brands effectively employ archetypal marketing, and related work shows that brand image fit does influence attitude for both symbolic and functional brands (Bhat and Reddy 2001). As such, I believe that archetype-based fit should influence brand extension success across all types of brand extensions, including those from functional brands. In testing the effects of archetype-based fit, I also add to the growing literature of brand archetypes. Existing brand archetype research largely focuses on how brands have implemented archetypes and how archetypes help brands become icons (Caldwell et al. 2010; Randazzo 2006; Tsai 2006). This paper instead takes a forward-looking approach, examining how brand archetypes can guide future brand behaviors (e.g., extending the brand).

CONCEPTUAL REVIEW

Brand Extensions and Fit

Brand extension is a common strategy wherein a brand leverages its current customer base and existing associations to extend into new product categories (Aaker 1990). The choice to

promote a new product under an existing brand name results in immediate consumer awareness, signals specific qualities or attributes associated with the parent brand, provides a point of differentiation, and can facilitate distribution (Aaker 1990; Völckner and Sattler 2006). For example, retailers are generally more willing to carry new products from well-known brands because they believe consumers are more likely to accept and try such products. When an extension succeeds, the parent brand also experiences positive spillover effects such as positive evaluations and reinforced parent brand associations (Aaker and Keller 1990; Ahluwalia and Gürhan-Canli 2000). Conversely, brand extension failure can damage the reputation of the parent brand (Aaker 1990). Further, extending into a highly divergent category can result in new associations from the extension category diluting the parent brand's essence, weakening its brand image and reputation (Loken and John 1993; Ries and Trout 1981).

When assessing the viability of a brand extension strategy, most research has focused on brand extension fit, defined as “the extent to which the image and associations linked to the parent brand and the extension product are similar and go well with the extension product” (Chun et al. 2015, p. 578). Although some recent research proposes that low fit can be positive for brand extensions (i.e., by motivating consumers to process extension information more deeply; Chun et al. 2015), most research finds that higher fit leads to more successful brand extensions (e.g., Aaker and Keller 1990; Broniarczyk and Alba 1994; Czellar 2003; Park et al. 1991).

To delineate potential sources of fit, I adopt the associative network model of brand associations (Anderson 1983). This model proposes that a brand is associated with a variety of concepts including attributes, benefits, user imagery, and functional features (Boush and Loken 1991; Chakravarti, MacInnis, and Nakamoto 1990; Keller 1993). Brand associations, if

successfully transferred to an extended product, can lead to quicker adoption, higher evaluations, and a more successful brand extension (Shen, Bei, and Chu 2011; Völckner and Sattler 2006).

Brand associations (and relatedly, assessments of fit) can be either product-related attributes or non-product-related attributes (Czellar 2003). Product-related attributes include functional or experiential benefits associated with a product category (i.e., physical similarity). Physical similarity assesses general category overlap, common product features, similarity in the technical expertise, and the substitutability or complementarity of the new product (Aaker and Keller 1990). When physical similarity between the parent category and extension category is high, brand extensions are more successful and received more positively by consumers (Aaker and Keller 1990; Boush and Loken 1991). Physical similarity can also be brand-specific and influence brand extension evaluations. For example, Broniarczyk and Alba (1994) showed that brand-specific product-related attributes (e.g., Crest Toothpaste's dental protection capabilities) positively influenced brand extension evaluations when that attribute was relevant in the extension category (e.g., dental protection is more important to toothbrushes than breath mints). Further, when consumer knowledge of the brand was high, brand-specific product attributes better predicted extension success than product category similarity or brand affect.

Non-product-related attributes are the symbolic benefits of and associations with the brand (Czellar 2003; Glynn and Brodie 1998; Park et al. 1991). Assessing conceptual similarity involves assessing abstract concepts (e.g., high status, prestige) as opposed to concrete attributes such as product features (e.g., engine size). For example, Rolex has a "prestigious" brand concept that is conceptually related to luxury men's accessories, whereas Timex has a "functional" brand concept. Thus, Rolex would be better suited than Timex to extend into the physically dissimilar, but conceptually similar, product category of neckties (Park et al. 1991).

Although the majority of fit research examines physical similarities (Czellar 2003), there is evidence that conceptual similarity can have more influence than physical similarity (Bhat and Reddy 2001). Indeed, Batra, Lenk, and Wedel (2010) found that brand extensions were deemed more appropriate when brand imagery fit with imagery of the extended category.

Although most research on conceptual similarity has focused on abstract benefits like prestige, conceptual similarity can also be influenced by brand personality traits, specific human-like characteristics that a brand embraces (Batra et al. 2010; Czellar 2003). Research on personality-based conceptual similarity is sparse, but brand personality has been shown to affect parent-brand dilution (Lau and Phau 2007) and affect toward symbolic brand extensions (Ferguson et al. 2016). I propose that the limited evidence for the effect of brand personality fit on extension success is due in part to the narrow nature of specific personality traits as a driver of overall brand image. For this reason, I turn to brand archetypes as they provide a more holistic means of creating an overall brand persona that may guide judgments of conceptual similarity. Given that each brand archetype is associated with multiple personality dimensions, specific goals, strategies to achieve those goals, and a fundamental human desire (see Table 7), archetypes can activate numerous associations at once (Mark and Pearson 2001; Rosch 1973; Spangenberg 2021, Chapter 1). Archetypes therefore allow a multidimensional approach to conceptual similarity that has been understudied, and this addresses calls for more research on brand extension effects based on non-product-related attributes (Czellar 2003).

Brand Archetypes

Archetypes exist in the collective unconscious, which means they are understood by everyone and do not depend on idiosyncratic experiences (Jung 1954). For example, a nurturing Mother figure transcends time and culture (Campbell 1949). Archetypal images frequently appear in literature, art, and storytelling. Their universality and versatility make archetypes very useful to represent brand personas (Mark and Pearson 2001). Brand personas are a common operationalization of a brand's extended identity (Ghodeswar 2008). As part of the extended identity, a brand archetype includes personality elements and uses the brand voice to communicate the brand's core identity across various platforms (Kohli and Yen 2019).

In their seminal work on brand archetypes, Mark and Pearson (2001) delineated twelve distinct brand archetypes, each associated with a unique human desire. For example, the Explorer archetype is associated with the fundamental human desire for freedom. These unique desires manifest as a set of personality traits and motivations that become the driving force behind everything a brand does. Although Mark and Pearson (2001) suggested that their twelve archetypes separate into four clusters around a shared motivation, a recent analysis of the topic suggests that archetypes can be classified by their breadth of societal influence and emotional arousal (Spangenberg 2021, Chapter 1). Table 7 describes the four archetype clusters.

INSERT TABLE 7 ABOUT HERE

In marketing, an archetype is a symbolic representation of brand identity and provides differentiation within product categories. Although entire product categories may broadly be associated with an archetype (e.g., beauty products are generally associated with the Lover;

Roberts 2010), brands can use archetypes to distinguish themselves from competitors even within a product category (Mark and Pearson 2001). For example, within the car category, Jeep associates with the Explorer archetype, while Mercedes-Benz embodies the Ruler. Aligning with an archetype allows brands to target distinct customer groups with different desires and motivations. Jeep purchasers are motivated by the need for freedom (i.e., Explorer's desire), and Mercedes-Benz owners seek a feeling of power with their car purchase (i.e., Ruler's desire).

That brands in the same category can separate themselves from competitors by using a well-defined archetype is particularly important for brand extensions. Brand archetype attributes integrate into consumers' brand associative networks (Keller 1993), and consumers can then examine the entirety of brand-specific associations (including those that a brand has cultivated through an archetype) to assess fit (Broniarczyk and Alba 1994; Mark and Pearson 2001). Further research suggests that brands are more broadly extendable when they are atypical brands in their category (i.e., those that are less closely linked to the broader category perception) (Batra et al. 2010). As archetypes play a key role in differentiating a brand from competitors within a product category, I would expect brands that have embraced an archetype to be more successful extending to far product categories. For example, Porsche (Ruler archetype) is atypical of the car category and has successfully extended into nonautomotive categories such as watches, eyewear, and briefcases (Batra et al. 2010). Importantly, note that the categories into which Porsche has extended align with the Ruler's authoritative, successful tone.

Although brand archetypes are distinct from brand personalities, the two concepts are closely related. Personality dimensions represent a brand's portrayal of one characteristic (e.g., ruggedness; Aaker 1997). Young & Rubicam conducted a consumer survey that assessed how consumers perceived archetypes on 48 distinct characteristics. Their survey found that each

archetype was comprised of multiple personality traits, each differentially weighted across archetypes (Mark and Pearson 2001). To test the notion that archetypes are comprised of many (versus one) personality dimensions, I also conducted a survey wherein I asked participants how strongly they associated 25 different personality traits with each archetype. I conducted 25 *t*-tests (one for each personality trait) on each archetype. All traits significantly higher than the scale midpoint of 4 were included in the bundle of personality traits associated with a specific archetype. The median archetype was significantly associated with 14 of the 25 personality traits. Thus, I find support for the argument that brand archetypes are prototypical in nature, aggregating numerous goals and motivations together with multiple personality characteristics (see Chapter 1, Study 1B for more details).

I conclude that archetypes influence perceptions of brand extension fit and explain the differential success of brand extensions between brands that are otherwise equally similar (or dissimilar) to the extension. I argue that brand archetype match will influence perceptions of a new product such that a product will be more successful when the brand extension is made by a company with a matched (vs. unmatched) archetype. Formally, I propose:

H1: When a brand extension is proposed by a matched (vs. unmatched) archetype brand, consumers will a) perceive the extension more likely to succeed and b) be more likely to purchase the extension.

Component Importance

Furthermore, I test the downstream effects of a matching archetype using a moderation-as-process design (Spencer, Zanna, and Fong 2005). Specifically, I manipulate the importance of an archetype component to show that brand-archetype fit is driving the process. Each of the twelve brand archetypes is associated with a distinct human desire (Mark and Pearson 2001). For example, the Sage seeks understanding whereas the Creator cares about innovation. Thus, fit should only be higher when the same component is important to the extended product.

Considering reasons why an attribute related (vs. unrelated) to the archetype is important to the extended product increases accessibility of the important attribute and influences the ease with which consumers make assessments of fit (Bridges, Keller, and Sood 2000). That is, when a key component of the archetype (e.g., *exploration* for the Explorer archetype) is unimportant (vs. important) to the brand extension, the effect of brand archetype fit should disappear. Conversely, increasing importance of an aspect unrelated to brand archetype will reduce perceptions of fit. If participants consider instead an aspect of the brand extension on which the two brands do not differ (e.g., technical expertise), I should observe no differences in predicted success or likelihood to purchase the brand extension. Formally,

H2: The effect of archetype match on perceptions of fit and brand extension success will be mitigated when attention is directed towards an archetype-unrelated component.

Consumer Mindset Construal

Construal level refers to the level of abstraction at which an object is held in memory (Trope and Liberman 2010). The core premise of Construal Level theory posits that psychological distance (e.g., social distance, temporal distance) will influence the mental representation of an object (Liberman and Trope 1998; Trope and Liberman 2010). Items or events that are psychologically distant (e.g., far away, occurring in the distant future), are construed at a more abstract, high level, whereas items or events that are psychologically close (e.g., nearby, occurring right now) are construed at more concrete, low level (Fujita et al. 2006; Liberman, Trope, and Stephan 2007; Liberman and Trope 1998). When considering things at a high construal level, objects tend to be categorized more broadly (Henderson et al. 2006) and described with more abstract language (Semin and Fiedler 1989).

An important tenet of Construal Level Theory is that subtle manipulations can alter one's mindset (abstract versus concrete) (Bar-Anan, Liberman, and Trope 2006; Liberman and Förster 2009). Even a subtle manipulation such as thinking about *how* an action is performed versus *why* it is performed can alter consumer mindset (Vallacher and Wegner 1987). For example, asking how one would go about preparing a healthy meal would draw attention to the low-level processes of the event (e.g., chopping vegetables, using low-fat ingredients), whereas asking why one would go about preparing a healthy meal would draw attention to the higher-level purpose (e.g., to maintain a healthy lifestyle; Trope and Liberman 2003). Other successful construal mindset manipulations include eliciting global versus local processing (Liberman and Förster 2009; Navon 1977) or having individuals consider consequences (vs. causes) of an event (Rim, Hansen, and Trope 2013). Further research has shown that situational primes or contextual

factors activate different mindsets (Briley and Wyer 2002; Hong et al. 2000), illustrating construal mindset manipulations does not require pristine lab conditions to manifest. For example, viewing a metaphorical (vs. literal) advertisement induced an abstract consumer mindset, which in turn increased evaluations of good fit extensions (Shan, Yu and Xue 2017). Altering consumer mindset influences later behaviors and judgments. Of particular importance to the current paper, research shows that an abstract (vs. concrete) construal level increases focus on similarities (Förster 2009). That is, when one is in a more abstract mindset, they are more likely to see two objects as related to one another (McCrea, Wieber, and Myers 2012).

An abstract mindset broadens perceptual attention and facilitates global processing, whereas concrete mindset narrows perceptual attention and facilitates feature processing (Förster, Friedman, and Liberman 2004; Kimchi 1992). Thus, even the type of similarities that are attended to differ depending on one's mindset. As it relates to brand extensions, product-related attributes such as physical similarity (Bridges et al. 2000) or product-category overlap (Broniarczyk and Alba 1994) are more concrete. In contrast, non-product related attributes such as brand concept consistency (Park et al. 1991) and brand personality (Ferguson et al. 2016) are more abstract. Self-construal research showed that people with an interdependent (vs. independent) self-construal rated brand extensions more favorably (Ahluwalia 2008) because they have superior relational processing and therefore are better able to see similarity between two unrelated objects (e.g., a far brand extension and its parent brand; Cross, Morris, and Gore 2002; Ng and Houston 2006; Spassova and Lee 2013). This effect, however, reversed when brand concept consistency (i.e., a non-product related attribute) between the parent brand and the extension product was high (vs. low) (Cai and Mo 2019). The authors argued this was because brand concept consistency is an abstract (vs. concrete) concept and thus drawing attention to the

abstract attributes helped independents see similarities. This finding is supported by work on mindset congruency. When consumer construal mindset matched the message frame (e.g., loss frames with a concrete mindset), likelihood of the requested behavior increased (i.e., recycling; White, MacDonnell, and Dahl 2011). Further, the construal level of time and money differs (i.e., time – abstract, money – concrete), and mindset congruency influences donation behaviors (MacDonnell and White 2015). When donors were in a concrete (abstract) mindset, they were more likely to donate money (time). In line with such research, as archetypes are an abstract concept, I would expect consumers with an abstract (vs. concrete) mindset to be better equipped to observed fit between brand extensions and their parent company when they align on an abstract dimension (i.e., shared archetype) (see Figure 11 for a conceptual model). Formally:

H3: Construal mindset will moderate the effect of archetype overlap, such that the effect of archetype match on perceived brand extension fit will be greater for those in an abstract (vs. concrete) mindset.

INSERT FIGURE 11 ABOUT HERE

I first conduct four pretests to create stimuli. The goal of the first pretest is to determine brand pairings for each of three archetypes. Specifically, I need two brands in the same product category: one brand that is highly representative of the archetype and one that is highly nonrepresentative of the archetype. After determining the two brands to use for each archetype, in Pretest 2 I created three fictitious brand extensions (one for each archetype) and ensure that these brand extensions are highly representative of their respective archetype. Pretest 3 pairs

each brand with an extension to show that the brands do not differ from one another on common dimensions of fit (i.e., typical user, product features, relevant firm experience, and technical expertise). Prior research on brand personality fit has been conducted only for symbolic brands, but I argue that archetype match can also benefit functional brands. Therefore, Pretest 4 compares the functional versus symbolic perceptions of the brands.

PRETEST 1 – ARCHETYPE-REPRESENTATIVE AND ARCHETYPE-NONREPRESENTATIVE BRANDS

Participants and Procedure

One hundred and forty-eight U.S. adults ($M = 35.2$ years, 45.3% female) were recruited from Amazon's Mechanical Turk (MTurk) in exchange for monetary compensation. Participants were first shown the definition of an archetype and a description of how companies use them in branding (see Appendix). Next, participants read a description of a specific archetype (Jester, Explorer, or Sage) and were asked to rate how well a list of brands fit with that archetype (1 = *Extremely bad fit*, 6 = *Extremely good fit*). Participants could also say they were unfamiliar with a brand. All brands for each archetype were in the same product category (Explorer – Cars, Jester – Candy, Sage – Media). Those who saw the Explorer archetype rated Jeep, Hyundai, Nissan, Toyota, and Ferrari. Those who saw the Jester archetype rated Skittles, Milk Duds, Hershey's, Crunch Bar, M&Ms, and Ghirardelli. Those who saw the Sage archetype rated BBC, Netflix, and HGTV. Participants completed these ratings for two archetypes, randomly assigned.

Results and Discussion

For each archetype, I conducted a repeated measures ANOVA with the brands from the chosen product category (e.g., candy for Jester) and observed a significant brand effect ($F(5, 270) = 16.22, p < .001$). From consumer discussions and observation of current advertisements, marketing strategies, and taglines, I predicted a brand for each archetype that would be the most representative. I predicted Skittles would be the most representative of the Jester. Therefore, I conducted planned contrasts of each brand against Skittles. Skittles ($M = 4.85$) was perceived as a significantly better fit with the Jester archetype than each other brand (Crunch: $M = 4.15, F(1, 54) = 11.20, p = .001$; Ghirardelli: $M = 3.35, F(1, 54) = 35.28, p < .001$; Hershey's: $M = 4.29, F(1, 54) = 7.07, p = .010$; Milk Duds: $M = 4.05, F(1, 54) = 13.90, p < .001$), except M&Ms ($M = 4.75; F(1, 54) = .39, p = .54$). After further consideration, Ghirardelli was deemed to be in a different product category than Skittles (i.e., luxury chocolate vs. candy). Therefore, for the Jester archetype I chose Skittles as the archetype-representative brand and Milk Duds as the archetype-nonrepresentative brand.

Next, a repeated measures ANOVA for the Explorer archetype also revealed a significant brand effect ($F(4, 232) = 14.65, p < .001$). A priori, I predicted Jeep to be most representative of the Explorer archetype. Planned contrasts revealed Jeep ($M = 5.14$) to be significantly more representative of the Explorer than the other car brands (Hyundai: $M = 3.75, F(1, 58) = 30.60, p < .001$; Ferrari: $M = 3.93, F(1, 58) = 20.52, p < .001$; Nissan: $M = 3.59, F(1, 58) = 39.40, p < .001$; Toyota: $M = 3.80, F(1, 58) = 31.43, p < .001$). Based on these results, for the Explorer archetype, I chose Jeep as the archetype-representative brand and Nissan as the archetype-nonrepresentative brand.

I conducted a third repeated measures ANOVA for the Sage archetype, which revealed a significant brand effect ($F(2, 102) = 21.26, p < .001$). I predicted BBC would be the most representative brand of the Sage. Planned contrasts revealed that BBC ($M = 4.69$) was, in fact, the most representative of the Sage as compared to HGTV ($M = 3.37, F(1, 51) = 24.91, p < .001$) and Netflix ($M = 3.23, F(1, 51) = 111.08, p < .001$). Based on these results, I chose BBC as the archetype-representative brand and Netflix as the archetype-nonrepresentative brand for the Sage archetype.

PRETEST 2 – PRODUCT-ARCHETYPE FIT

Participants and Procedure

Participants were 50 U.S. adults ($M = 40.3$ years, 50% female) from MTurk. All participants read a description of brand archetypes (see Appendix). Next, participants read the description of a specific brand archetype and reported how well the fictitious brand extensions fit with the archetype. I created three fictitious brand extensions, one to be representative of each Explorer, Jester, and Sage archetype. Specifically, I proposed an online costume shop for the Jester, telescopes for the Explorer, and a silent meditation retreat for the Sage. Participants responded to four items assessing fit of the product with the respective archetype (*Low fit/high fit, Dissimilar/Similar, Inconsistent/Consistent, Not representative at all/Extremely representative*) on 7-point scales.

Results and Discussion

The four fit items loaded onto one factor ($\alpha = .97$), so I created one fit variable. Three one-sample t -tests (against the midpoint of 4) indicated that each nonprofit was seen as highly representative of the archetype for which they were created. The Online Costume Shop was highly representative of the Jester ($M = 5.69$, $SD = 1.22$, $t(49) = 9.73$, $p < .001$), Telescopes were highly representative of the Explorer ($M = 5.90$, $SD = 1.12$, $t(49) = 11.97$, $p < .001$), and Silent Meditation Retreats were highly representative of the Sage ($M = 5.25$, $SD = 1.55$, $t(49) = 5.66$, $p < .001$).

PRETEST 3 – PERCEPTIONS OF BRAND EXTENSION FIT

Participants and Procedure

Two-hundred and six U.S. adults ($M = 39.6$ years, 47.1% female) from MTurk participated in exchange for monetary compensation. I randomly assigned participants to assess one of three extensions: Online Costume Shop (Jester), Telescope (Explorer), Silent Meditation Retreat (Sage). Participants read a brief description of the brand extension (see Appendix). In each description, I emphasized key aspects of the archetype. For example, the costume shop emphasized playfulness and fun to represent the Jester's desire for enjoyment. Next, participants were randomly assigned to either the archetype-representative brand or the archetype-nonrepresentative brand. For example, half of the participants read that Skittles was creating the Online Costume Shop and the other half read that Milk Duds was creating it. All participants reported the perceived fit between the brand and the extension on typical consumer, product

features, relevant firm experience, and technical expertise on 7-point scales (see Appendix for items).

Results and Discussion

The four fit items loaded onto one factor ($\alpha = .88$). However, it was important that the two brands did not differ on any of the four items, so each fit item was tested separately. I conducted a 2 (Brand) between-subjects ANOVA for each extension and brand. For the Online Costume Shop, Skittles and Milk Duds did not differ on typical consumers, product features, and technical expertise ($ps > .23$). Although there was a significant difference between the brands on relevant firm experience ($p = .027$), Milk Duds was higher than Skittles. For the telescopes, there was no difference between Jeep and Nissan on typical consumers, relevant firm experience, or technical expertise ($ps > .09$). Even though the brands showed a significant difference on product features, Nissan was higher than the archetype-match brand, Jeep ($p = .007$). For the Silent Meditation Retreat, there were no significant differences between BBC and Netflix on any of the four fit dimensions ($ps > .23$). See Table 8 for all results.

INSERT TABLE 8 ABOUT HERE

Next, I compared each brand against the midpoint (4) to assess overall fit (average of four fit items). The fit of Skittles with an online costume shop was significantly below the midpoint ($M = 3.22$, $t(36) = -3.71$, $p = .001$), while Milk Duds' fit did not differ significantly from the midpoint ($M = 3.62$, $t(29) = -1.17$, $p = .25$). The same pattern emerged when examining the

telescope extension. The fit of Jeep with telescopes was significantly below the midpoint ($M = 3.25$, $t(35) = -3.55$, $p = .001$), while Nissan's fit did not differ significantly from the midpoint ($M = 3.65$, $t(30) = -1.36$, $p = .184$). Thus, in addition to fit similarity not differing between the brands, the archetype-representative brand was actually perceived to be a worse fit with the brand extension. Both BBC and Netflix were below the midpoint, but did not differ significantly from the midpoint, ($M_{BBC} = 3.62$, $t(38) = -1.54$, $p = .133$; $M_{Netflix} = 3.43$, $t(29) = -1.83$, $p = .08$).

PRETEST 4 – FUNCTIONAL VERSUS SYMBOLIC BRANDS

Participants and Procedures

Participants were 260 U.S. adults ($M = 39.5$ years, 53.4% female) who completed the survey on MTurk in exchange for a nominal fee. Each participant rated one of the six brands from Pretest 1 for symbolism and functionality (see Appendix for measures; Bhat and Reddy 1998). Bhat and Reddy's (1998) symbolism/functional brand measure finds two factors of symbolism: Personality Expression and Prestige.

Results and Discussion

All items were centered (zero as the midpoint) and three variables were created ($r_{func} = .78$, $r_{pers} = .88$, $r_{prestige} = .88$). The results of a paired t -test for each brand, shown in Table 9, confirmed that all six brands had significantly higher mean scores for functionality than at least one dimension of symbolism (i.e., personality or prestige).

INSERT TABLE 9 ABOUT HERE

The pretests ensured the chosen brands and brand extensions would test for archetype-based brand extension fit. Pretest 1 identified brand pairs for three archetypes (Explorer, Jester, Sage). For each archetype, I identified two brands from a single category with one brand being highly representative of the archetype in question and one brand that was highly-nonrepresentative of the archetype in question. Next, in Pretest 2, I confirmed that the fictitious brand extensions were highly representative of one of the three archetypes (i.e., Jester – Online Costume Shop, Explorer – Telescopes, Sage – Silent Meditation Retreats). In Pretest 3, I assessed common sources of potential fit to ensure the brand extensions were equivalent on typical consumers, product features, relevant firm experience, and technical expertise. Although two archetypes had a significant difference on one dimension of fit, both differences showed the archetype-nonrepresentative brand to have higher fit. Thus, any observable differences should be attributable to a shared archetype. Finally, I argue that archetype match can effectively drive fit for functional brands, something that has not been shown in the literature. Pretest 4 confirmed that the chosen brands are functional (vs. symbolic).

STUDY 1 – THE EFFECT OF ARCHETYPE MATCH ON BRAND EXTENSION SUCCESS

Participants and Procedure

Ninety-eight undergraduate students ($M = 20.7$ years, 44.9% female) participated in exchange for partial course credit. All participants were told they would assess a series of new

product offerings. In total, participants rated three new potential brand extensions, each paired with a distinct archetype (Online costume shop – Jester, Telescope – Explorer, Silent meditation retreat – Sage). The participants read the description of the new product and answered all subsequent questions before moving to the next extension.

After reading the description of the new product (see Appendix), participants were randomly assigned to either the archetype component-salient condition or the archetype component-not-salient condition. In the component-salient condition, participants described why a critical component of the matched archetype was important when using the new product (e.g., “Why is a sense of exploration important when using a telescope?”). In the component-not-salient condition, participants described why technical expertise was important when using the product. Recall from Pretest 3 that no brand pairs differed on technical expertise.

After the archetype component salience manipulation, participants reported which of the two brands they thought would be more successful as the creator of the brand extension (0 = *ArchMatch Brand*, 1 = *NotArchMatch Brand*; order randomized). They also rated two questions on how successful they thought the extension would be if created by ArchMatch [NotArchMatch] Brand (1 = *Not successful at all*, 7 = *Extremely successful*). Next, I asked which brand extension participants would purchase (0 = *ArchMatch Extension*, 1 = *NotArchMatch Extension*), as well as how likely they would be to buy ArchMatch [NotArchMatch] Extension (1 = *Not likely at all*, 7 = *Very likely*). Finally, participants reported how well the ArchMatch [NotArchMatch] Brand fit with the brand extension (1 = *Does not fit at all*, 7 = *Fits extremely well*).

After rating all three brand extensions, participants assessed archetype associations. Participants read a description of brand archetypes. Then, they saw the brand archetype for each

brand extension and asked them how representative the product was of the brand archetype (e.g., How representative are telescopes of the Explorer archetype?; 1 = *Not representative at all*, 7 = *Extremely representative*). I ended by measuring familiarity and general attitude towards the brands on 7-point scales.

Results and Discussion

First, I conducted a 2 (archetype component importance: yes, no) x 2 (brand, a within-subject variable: archetype-matched, not-archetype-matched) mixed-design ANOVA on perceived fit. Significant archetype component importance ($F(1, 292) = 4.61, p = .033, \eta^2 = .02$) and brand effects ($F(1, 292) = 31.00, p < .001, \eta^2 = .10$) were qualified by a significant component importance \times brand interaction ($F(1, 292) = 3.11, p = .014, \eta^2 = .02$; see Figure 12). Pairwise comparisons revealed that for the archetype-matched brand, fit was significantly higher when the component was important ($M = 3.28$) as compared to technical expertise being important ($M = 2.67$; $F(1, 292) = 8.43, p = .004, \eta^2 = .03$). That is, when participants focused on technical expertise, a component on which the archetype-matched brand did not align with the extension, the effect was mitigated, supporting hypothesis 2. In contrast, there was no significant difference between component importance conditions for the not-archetype-matched brand ($M_{\text{CompImp}} = 2.41, M_{\text{CompNotImp}} = 2.34$; $F(1, 292) = 4.75, p = .68$). A one-sample t -test revealed that all three products were individually perceived to be significantly representative of its associated archetype, ($t(292) = 26.53, p < .001$).

INSERT FIGURE 12 ABOUT HERE

I next looked at which of the two brands participants thought would be more successful as the parent brand of the extension. To test this, I conducted a binomial test to determine if a greater proportion of participants thought the archetype matched brand would be more successful as a parent brand as compared to the brand that was not a match with the archetype.

Theoretically, the pretests suggested that the two brands should be equally likely to be perceived as a successful parent brand of the product extension. Thus, I used 50% as the hypothesized proportion. As predicted, the majority of participants chose the archetype-matched brand as more likely to be successful (63.3%) than the not-archetype-matched brand (36.7%; 95% CI: 57.5% – 68.8%, $p < .001$).

I hypothesized that perceived archetypal fit affects perceptions of brand extension success. If this is the case, predicted success should be higher in the archetype-matched brand when a related archetypal component was important (vs. not important) to the product extension. I conducted a 2 (archetype component importance) x 2 (brand, a within-subject variable: archetype-matched vs. not-archetype-matched) mixed-design ANOVA on success. The brand effect was significant ($F(1, 292) = 12.60, p < .001, \eta^2 = .04$), and the interaction between component importance and brand interaction approached significance ($F(1, 292) = 2.58, p = .11, \eta^2 = .01$). There was no effect of archetype component importance ($F(1, 292) = .03, p = .86$). Pairwise comparisons revealed that when the archetype component was important to the product, the archetype-matched brand was predicted to be more successful ($M = 3.70$) than the not-archetype-matched brand ($M = 3.12; F(1, 292) = 13.38, p < .001, \eta^2 = .04$). There was no difference between the brands when archetype component was not important to the product ($F(1, 292) = 1.88, p = .17$; see Figure 13).

INSERT FIGURE 13 ABOUT HERE

I next looked at behavioral intentions regarding which brand the participants would buy the brand extension from. Again, I conducted a binomial test using 50% as the hypothesized proportion. When making a choice between the two brands, participants were significantly more likely to buy the extension from the archetype-matched brand (61.2%) than from the not-archetype-matched brand (38.4%; 95% CI: 55.7% – 67.2%, $p < .001$). Next, I conducted a mixed-design ANOVA on purchase intentions. There was a main effect of brand ($F(1, 292) = 12.50, p < .001, \eta^2 = .04$) and a marginally significant interaction ($F(1, 292) = 2.81, p = .10, \eta^2 = .01$). There was no effect of component importance, ($F(1, 292) = .45, p = .50$). Pairwise comparisons revealed that when the archetype component was important, people were significantly more likely to purchase the extension from the archetype-matched brand ($M = 2.62$) than from the not-archetype-matched brand ($M = 2.14; F(1, 292) = 13.67, p < .001, \eta^2 = .05$). There was no difference between brands when the archetype component was not important, ($F(1, 292) = 1.72, p = .19$; see Figure 14).

INSERT FIGURE 14 ABOUT HERE

The results of Study 1 suggest that archetype match influences perceived success and intentions to buy a brand extension. I find support for hypothesis 1 in that participants predicted an extension would be more successful and reported a higher likelihood of purchasing the brand when it was created by an archetype-matched brand as opposed to a brand in the same product category that does not convey that archetype. Further, as predicted in hypothesis 2, the effect of

perceived fit is mitigated when participants' attention is directed to a component unrelated to the archetype.

Although I observed the predicted increase in perceived fit from component importance, the results observed for likelihood of buying was slightly different. Specifically, when a component of the archetype is important, what I observe looks more like a punishment to low-fit cases (i.e., the archetype-not-matched brand) rather than a boost to archetype-matched brands. However, I believe this further highlights the importance of brand archetypes. When an archetype-component is important to a product category, brands that have embraced a shared archetype will be perceived as having higher fit and benefit accordingly. In addition, however, brands without a shared archetype may receive low evaluations if consumers are made aware of a component with which they are not associated. Importantly, again I observed no significant differences when the archetype component was not made salient to the brand extension.

Study 1 provided support for the core predicted effect, but it had some limitations I seek to address in Study 2. First, despite participants' preference for the archetype-representative brands in the forced comparison conditions (i.e., the binomial tests), perceptions of overall fit and responses to the Likert scale measures of success and purchase intentions were below the midpoint. I believe these results occurred at least in part because the extensions did not differ between brands on any dimension aside from archetype match, which is subtle. In fact, archetype-nonrepresentative brands were higher than the archetype-representative brands on certain fit dimensions (e.g., Milk Duds significantly higher than Skittles on relevant firm experience for a Costume Shop). Despite these limitations, however, I still saw a significant archetype-match effect for all brand extensions. Second, Study 1 used a within-subjects design in which two brands were directly compared to one another. The participants may have been better

able to observe archetype fit (or lack thereof) when the archetype-representative brand was directly compared to the archetype-nonrepresentative brand. Therefore, in Study 2 I employ a between-subjects design.

STUDY 2 – THE EFFECT OF CONSTRUAL LEVEL ON ARCHETYPE MATCH

Study 1 showed initial support for the process by which brand archetypes influence brand extension perception. If consumers assess brand archetype extensions based on their conceptual similarity, then factors that influence the perception of abstract information should moderate the main effect. Thus, in Study 2, I test this process with a moderator: construal level. Consumers with a more abstract (vs. concrete) mindset should perceive higher fit for archetype-matched brand extensions.

Participants and Procedure

Participants were 292 U.S. adults ($M = 39.9$ years; 50.4% female) recruited from MTurk. Forty-one participants were removed (six failed to correctly recall the brand or extension, 19 were unfamiliar with the brand they viewed, and 16 with excessively fast response times), leaving a sample size of 251. Construal level was manipulated using a “Why” versus “How” manipulation adapted from Freitas, Gollwitzer, and Trope (2004). Participants in the concrete condition shared *how* they would go about preparing a healthy meal. In the abstract condition, participants wrote about *why* they would go about preparing a healthy meal (see Appendix). To confirm the manipulation check worked as intended, participants reported what they were

thinking about while responding to the prompt on two 9-item scales (*how/why to prepare a healthy meal; the process of/reasons for preparing a healthy meal*).

After completing the construal manipulation task, participants read about a Master Gardener Class brand extension being proposed by either LEGO (archetype-match) or NERF (not-archetype-match). Participants responded to a 4-item measure of overall fit on 7-point scales (How do you think the [brand] fits with a Master Gardener class?; *Low fit/High fit, Dissimilar/Similar, Inconsistent/Consistent, Not complementary/Complementary*). Recall that Pretest 2 confirmed LEGO was representative of the Creator archetype, while NERF was not representative. An additional pretest showed that a Master Gardener Class was significantly representative of the Creator archetype ($M = 5.10$, $t(108) = -238.96$, $p < .001$) and that LEGO and NERF did not differ on common fit dimensions with a Master Gardener Class (see Table 10). Thus, the question that assessed fit more broadly would indicate an archetype fit.

INSERT TABLE 10 ABOUT HERE

Results and Discussion

Manipulation check. A oneway ANOVA confirmed that the construal level manipulation worked as intended. Participants instructed to write about why to prepare a healthy meal reported significantly more abstract mindset ($M = 7.55$) than those who wrote about how to prepare a healthy meal ($M = 2.78$; $F(1, 250) = 327.98$, $p < .001$).

Perceived fit. A 2 (construal level) x 2 (archetype match) between-subjects ANOVA on perceived fit revealed that neither archetype match ($F(1, 250) = .63$, $p = .43$) nor construal level

($F(1, 250) = 1.24, p = .27$) had a significant main effect. Importantly, however, I observed a significant brand \times construal level interaction ($F(1, 250) = 3.55, p = .06$). To probe this interaction further, I conducted planned contrasts, which showed that when there was no archetype match, perceived fit did not differ between the abstract ($M = 3.04, SD = 2.17$) and concrete conditions ($M = 3.23, SD = 2.23; F(1, 247) = .28, p > .59$). However, in the archetype-match condition, those in an abstract mindset ($M = 3.31, SD = 1.89$), reported higher perceived fit than those with a concrete construal mindset ($M = 2.56, SD = 1.56; F(1, 247) = 4.78, p = .030$). These results, supporting hypothesis 3 are graphically depicted in Figure 15. Interestingly, I would have predicted an increase in the abstract condition for the archetype-match extension as opposed to what appears to be a decrease in fit for the archetype-match extension when participants are in a concrete mindset. This is likely due to overlooked experimental factors affecting construal mindset. For example, construal theory research has shown attribute alignability to also affect construal mindset such that when attributes for two objects align, the resulting mindset is more concrete (vs. abstract) (Wakslak and Trope 2009). Thus, the abstract construal mindset from the manipulation may have been mitigated when participants then assessed fit of a brand extension with an aligned archetype.

INSERT FIGURE 15 ABOUT HERE

I also observed a surprising lack of a main effect of construal level on perceived fit, which could be for numerous reasons. First, there is a chance the manipulation did not alter participants' mindset. Although a manipulation check confirmed the predictions and the median time spent responding to the prompt was almost two minutes ($M = 108$ seconds), distraction in

online survey environments such as on MTurk is commonplace. There also might be a limit to the effectiveness of archetype-based fit. Even though the extension was highly representative of the Creator archetype, a Master Gardener Class might simply have been an unbelievable brand extension for LEGO. Indeed, across conditions the perceptions of fit with LEGO were well below the midpoint.

GENERAL DISCUSSION

Across two studies, I found support for the argument that brand archetypes can effectively increase success of brand extensions. I demonstrate the process by showing that the effect is mitigated when a key component of the archetype is *not* important to the extension. I showed the effect using numerous brands and product categories. In Study 1, I observed the predicted archetype-as-fit effect for candy, automobiles, and television companies. I also varied the type of product extension. These effects held when the extended product was a search good (i.e., telescope) as well as an experience good (i.e., silent meditation retreat). In Study 2, I manipulated construal level, and I predicted participants in an abstract mindset would perceive higher fit between brand and extension when there was an archetype match. Although I observed the predicted interaction between archetype match and construal mindset, surprisingly I did not observe the main effect that abstract mindset results in higher perceived fit overall. This deserves further consideration.

Altogether, this research extends previous work on the effects of brand personality on brand extensions (Ferguson et al. 2016; Lau and Phau 2007). For example, Lau and Phau (2007) show that in response to a brand extension, brand personality fit influences the dilution of affect toward the parent brand, but they do not examine evaluations of the extension itself. In contrast, I

assess extension attitude, purchase intentions, and willingness to pay –factors that would indicate overall success of the extension. This also differentiates my work from Ferguson et al. (2016), who find that brand personality fit influences positive affect towards the extension. I further contribute to brand personality fit research by investigating its effect on functional (vs. symbolic) brands. Related work shows that brand image fit positively increases affect towards both symbolic and functional brands (Bhat and Reddy 2001), and thus I formally test the effect of personality-based archetypes as fit on functional brands. Finally, the use of a novel brand persona operationalization, brand archetypes, increases relevance to marketers. As brand archetypes become increasingly important (Mark and Pearson 2001), more work is needed to understand their benefits. I show that consumers can use brand archetypes to assess brand extension fit and allow a brand to extend into product categories with which they do not otherwise align.

Practically, this research shows that brand archetype fit is important to consumers' assessment of brand extension fit. To successfully convey fit, marketers must first develop a clear and consistent brand archetype. Then, they can leverage critical components of the archetype to facilitate fit with otherwise unrelated product categories and more successfully execute far brand extensions. Marketers should be keenly aware of how they advertise a brand extension in a far product category. For example, brands could benefit disproportionately from emphasizing shared archetypal components when extending to a product category where there is no expertise or overlapping user imagery. Finally, the effect of construal mindset as a moderator suggests that marketers should adapt their advertising and guide consumers towards an abstract construal mindset. An abstract mindset facilitates more global processing (Förster et al. 2004; Kimchi 1992) and allows consumers to better see similarities between two unrelated objects (Ng

and Houston 2006). As brand archetypes are construed more abstractly (Jung 1938), viewing an advertisement that induces an abstract mindset should in turn cause the consumer to notice the brand archetype consistency and report higher levels of perceived fit.

Limitations and Directions for Future Research

This research has limitations that offer several directions for future research. First, I test the process using moderation of construal mindset, but there may be other moderating factors. Broadly, I suggest future work investigate individual differences that affect archetype perceptions and subsequent evaluations. For example, prior research shows that people use chronically accessible personality traits to make inferences about other people (Higgins, King, and Mavin 1982; Johar, Sengupta, and Aaker 2005). Similarly, as archetypes are brand personas, chronically accessible personality traits may influence perceptions of archetypal brands. Consumer involvement or risk preferences and might also influence evaluations of a new product.

Further, there may be unexamined brand or product category effects. These studies employed a variety of real brands. Although I accounted for brand familiarity and personal relevance, there could be unexplored brand factors at play. Relatedly, there could be moderating factors related to the product and the extension. For example, what are the effects of a predominantly utilitarian brand extending into a hedonic category, or vice versa? Consumers' familiarity with the extension product category may influence parent brand association transfer. Replication of these findings should use different product categories and brands with various imagery.

Although using undergraduate students provides an ideal setting for theory testing and has high internal validity (Lynch 1982), it sacrifices external validity. In the two experiments, participants were relatively free of distractions. However, in the real world consumers view advertisements under varying degrees of cognitive load, which may affect their ability to process the extensions. Although subtle manipulations have been shown to alter construal mindset (Vallacher and Wegner 1987), future research is needed to determine the limit at which consumers' mindsets are unaffected.

Finally, the experimental design did not include a control condition. In Study 2, I showed differences between the abstract condition and the concrete condition but cannot empirically confirm the theoretical argument that those in the abstract condition perceived greater conceptual fit (vs. those in the concrete condition seeing less). Future research should investigate this. In closing, I believe this research will encourage researchers to creatively and theoretically investigate the potential of brand archetypes. Existing brand archetype research is largely exploratory or descriptive, such as describing how companies execute brand archetypes and their benefit to consumer relationship development (Caldwell et al. 2010; Randazzo 2006). Thus, this research is the first to test theoretical predictions as to how brand archetypes can guide future brand actions. Given these results, this research should encourage brands to invest in brand archetype development with the understanding it may allow them to extend to broader product categories.

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TABLES

TABLE 1

BRAND ARCHETYPE SUMMARY (ADAPTED FROM MARK AND PEARSON 2001)

(CHAPTER 1)

Motivation	Archetype	Human Desire	Goal (Helps people to...)	Example Brands
Connection with others	<i>Everyman</i>	Belonging	Be okay just as they are	IKEA, Visa, Target
	<i>Jester</i>	Enjoyment	Have a good time	M&M's, Dollar Shave Club
	<i>Lover</i>	Intimacy	Find and give love	Bailey's, Chanel
Provide Structure to the world	<i>Caregiver</i>	Service	Care for others	Johnson & Johnson, UNICEF
	<i>Creator</i>	Innovation	Craft something new	LEGO, Adobe, Crayola
	<i>Ruler</i>	Control	Exert control	Microsoft, Mercedes-Benz
Yearn for Paradise	<i>Innocent</i>	Safety	Retain or renew faith	Coca-Cola, Dove
	<i>Sage</i>	Understanding	Understand their world	BBC, Google, Rosetta Stone
	<i>Explorer</i>	Freedom	Maintain independence	REI, Jeep, The North Face
Leave a mark on the world	<i>Hero</i>	Mastery	Act courageously	Nike, Snickers, FedEx
	<i>Magician</i>	Power	Affect transformation	Disney, Dyson, MAC
	<i>Outlaw</i>	Liberation	Break the rules	Harley-Davidson, Virgin, Diesel

TABLE 2

PREDICTED HIGHEST PERSONALITY TRAIT FOR EACH ARCHETYPE (CHAPTER 1,
STUDY 1B)

Archetype	Predicted Highest Trait
Caregiver	Caring
Creator	Creative
Everyman	Relatable
Explorer	Adventurous
Hero	Brave
Innocent	Innocent
Jester	Humorous
Lover	Sensual
Magician	Imaginative
Outlaw	Rebellious*
Ruler	Authoritative
Sage	Wise

*Data supported predictions, except Rebellious ranked second for Outlaw, behind Adventurous

TABLE 3

PERSONALITY TRAIT BUNDLES FOR EACH BRAND ARCHETYPE (TRAITS LISTED ARE SIGNIFICANTLY HIGHER THAN THE SCALE MIDPOINT OF 4) (CHAPTER 1, STUDY 1B)

Sense of Wonder				Sense of Calm							
Explorer		Creator		Caregiver		Innocent		Everyman		Sage	
Trait	Mean	Trait	Mean	Trait	Mean	Trait	Mean	Trait	Mean	Trait	Mean
Adventurous	6.32	Creative	5.82	Caring	6.23	Innocent	6.52	Relatable	5.29	Wise	6.00
Exciting	6.08	Imaginative	5.80	Kind	6.08	Caring	6.02	Caring	5.06	Intelligent	5.63
Rugged	6.04	Intelligent	5.45	Trustworthy	6.02	Sincere	5.96	Likeable	4.98	Imaginative	5.35
Brave	6.00	Competent	5.18	Sincere	5.90	Naïve	5.83	Sincere	4.96	Competent	5.33
Imaginative	5.57	Sophisticated	5.02	Likeable	5.90	Kind	5.81	Kind	4.88	Creative	5.28
Intelligent	5.57	Adventurous	4.98	Relatable	5.60	Likeable	5.81	Trustworthy	4.85	Trustworthy	5.26
Competent	5.55	Exciting	4.84	Competent	5.52	Trustworthy	5.60	Competent	4.63	Sophisticated	5.07
Creative	5.49	Wise	4.82	Wise	5.31	Imaginative	5.19	Imaginative	4.56	Sincere	5.06
Likeable	5.19	Relatable	4.82	Innocent	5.25	Creative	5.04	Humorous	4.56	Kind	4.93
Rebellious	5.13	Likeable	4.82	Intelligent	4.98	Relatable	4.85	Innocent	4.46	Caring	4.89
Sincere	5.04	Sincere	4.82	Imaginative	4.83	Competent	4.65	Intelligent	4.42	Likeable	4.89
Wise	5.02	Brave	4.73	Brave	4.83	Fearful	4.54			Brave	4.81
Relatable	4.94	Trustworthy	4.67	Sensual	4.75					Adventurous	4.70
Trustworthy	4.92	Sensual	4.63	Creative	4.50					Relatable	4.56
Humorous	4.85	Kind	4.59							Humorous	4.44
Caring	4.75	Caring	4.57								
Sophisticated	4.72										
Kind	4.66										
Sensual	4.57										

TABLE 3 CONT'D

PERSONALITY TRAIT BUNDLES FOR EACH BRAND ARCHETYPE (TRAITS LISTED ARE SIGNIFICANTLY HIGHER THAN THE SCALE MIDPOINT OF 4) (CHAPTER 1, STUDY 1B)

Positive Emotional Arousal						High Social Influence					
Lover		Jester		Magician		Ruler		Outlaw		Hero	
<i>Trait</i>	<i>Mean</i>	<i>Trait</i>	<i>Mean</i>	<i>Trait</i>	<i>Mean</i>	<i>Trait</i>	<i>Mean</i>	<i>Trait</i>	<i>Mean</i>	<i>Trait</i>	<i>Mean</i>
Sensual	6.02	Humorous	6.10	Imaginative	6.14	Authoritative	6.11	Adventurous	5.70	Brave	6.19
Caring	5.40	Imaginative	5.83	Creative	5.98	Arrogant	5.51	Rebellious	5.58	Adventurous	5.92
Adventurous	5.23	Creative	5.79	Exciting	5.72	Competent	5.38	Rugged	5.58	Competent	5.79
Likeable	5.15	Adventurous	5.75	Intelligent	5.72	Intelligent	5.30	Brave	5.23	Exciting	5.74
Imaginative	5.11	Likeable	5.35	Adventurous	5.60	Manipulative	5.25	Arrogant	5.09	Trustworthy	5.55
Kind	5.11	Exciting	5.29	Manipulative	5.54	Brave	5.00	Exciting	5.09	Likeable	5.49
Exciting	5.09	Rebellious	5.17	Competent	5.52	Sophisticated	5.00	Manipulative	5.05	Sincere	5.47
Relatable	5.00	Brave	4.77	Wise	5.44	Wise	4.91	Authoritative	4.93	Intelligent	5.38
Creative	4.89	Kind	4.69	Arrogant	4.88	Rugged	4.43	Competent	4.81	Authoritative	5.34
Sophisticated	4.70	Sensual	4.63	Humorous	4.86			Intelligent	4.81	Kind	5.28
Humorous	4.60	Caring	4.60	Authoritative	4.82			Creative	4.74	Wise	5.21
Sincere	4.55	Relatable	4.58	Brave	4.82			Imaginative	4.65	Caring	5.17
		Intelligent	4.42	Sophisticated	4.72					Rugged	5.11
				Likeable	4.66					Imaginative	4.85
				Rebellious	4.58					Creative	4.79
										Relatable	4.58
										Sophisticated	4.51

TABLE 4

MEANS FOR BRAND ARCHETYPE REPRESENTATIVENESS (CHAPTER 1, STUDY 2)

<i>Tightly Defined Brands</i>						
Brand	Most Representative Archetype	Mean	Second Most Representative Archetype	Mean	Mean Difference	% Difference
<i>Victoria's Secret</i>	Lover	4.88	Creator	3.69	1.19	24.4%
<i>McDonald's</i>	Everyman	4.86	Jester	3.77	1.09	22.4%
<i>Levi's</i>	Everyman	5.22	Hero	4.09	1.13	21.6%
<i>Adobe</i>	Creator	5.08	Sage	4.04	1.04	20.5%
<i>Apple</i>	Creator	5.54	Magician	4.64	0.90	16.2%
<i>Johnny Walker</i>	Outlaw	4.86	Hero	4.09	0.77	15.8%
<i>Delta</i>	Explorer	4.31	Everyman	3.71	0.60	13.9%
<i>Coca-Cola</i>	Everyman	5.04	Jester	4.35	0.69	13.7%
<i>Subway</i>	Everyman	4.32	Creator	3.78	0.54	12.5%
<i>M&Ms</i>	Everyman	4.79	Jester	4.24	0.55	11.5%
<i>Jeep</i>	Explorer	5.00	Everyman	4.44	0.56	11.2%
<i>Google</i>	Creator	5.44	Sage	4.85	0.59	10.8%

<i>Flexible Brands</i>						
Brand	Most Representative Archetype	Mean	Second Most Representative Archetype	Mean	Mean Difference	% Difference
<i>Xbox</i>	Jester	5.23	Creator	4.77	0.46	8.8%
<i>US Bank</i>	Ruler	3.96	Everyman	3.62	0.34	8.6%
<i>Mercedes</i>	Ruler	4.68	Creator	4.30	0.38	8.1%
<i>REI</i>	Explorer	4.89	Hero	4.50	0.39	8.0%
<i>Amazon</i>	Everyman	4.86	Creator	4.52	0.34	7.0%
<i>Microsoft</i>	Creator	4.88	Ruler	4.59	0.29	5.9%
<i>Barnes & Noble</i>	Sage	4.48	Everyman	4.26	0.22	4.9%
<i>LEGO</i>	Creator	4.96	Jester	4.72	0.24	4.8%
<i>Disney</i>	Jester	5.27	Creator/Innocent	5.04	0.23	4.4%
<i>Ferrari</i>	Ruler	4.70	Creator	4.56	0.14	3.0%
<i>Nike</i>	Everyman	4.43	Hero	4.30	0.13	2.9%
<i>Charmin</i>	Everyman	4.56	Caregiver	4.43	0.13	2.9%
<i>Huggies</i>	Innocent	4.93	Caregiver	4.79	0.14	2.8%
<i>General Electric</i>	Creator	4.40	Ruler	4.32	0.08	1.8%
<i>Skittles</i>	Everyman	4.54	Jester	4.46	0.08	1.8%
<i>Harley Davidson</i>	Outlaw	5.42	Explorer	5.38	0.04	0.7%
<i>Dove</i>	Lover	4.63	Innocent	4.60	0.03	0.6%
<i>National Geographic</i>	Sage	5.15	Explorer	5.13	0.02	0.4%

TABLE 5

ARCHETYPES AND THEIR ASSOCIATED FUNDAMENTAL HUMAN DESIRE

(CHAPTER 2)

Archetype	Human Desire
<i>Everyman</i>	Belonging
<i>Jester</i>	Enjoyment
<i>Lover</i>	Intimacy
<i>Caregiver</i>	Service
<i>Creator</i>	Innovation
<i>Ruler</i>	Control
<i>Innocent</i>	Safety
<i>Sage</i>	Understanding
<i>Explorer</i>	Freedom
<i>Hero</i>	Mastery
<i>Magician</i>	Power
<i>Outlaw</i>	Liberation

TABLE 6

NONPROFIT FIT RESULTS (CHAPTER 2, PRETEST 3)

Nonprofit	Fit Dimension	Mean	Mean	<i>p</i> value
		<i>Skittles</i>	<i>Milk Duds</i>	
Senior Juggling Center	Typical Consumer	3.41	3.41	.99
	Product Features	3.75	3.29	.37
	Relevant Firm Experience	3.16	2.79	.44
	Technical Expertise	2.97	3.38	.64
		<i>Jeep</i>	<i>Nissan</i>	
Discovery Air and Space Museum	Typical Consumer	4.48	4.5	.97
	Product Features	4.26	4.44	.63
	Relevant Firm Experience	3.84	3.83	.99
	Technical Expertise	4.23	4.19	.94
		<i>LEGO</i>	<i>NERF</i>	
Young Entrepreneur Council	Typical Consumer	4.47	4.83	.43
	Product Features	4.69	4.89	.66
	Relevant Firm Experience	5.00	4.58	.35
	Technical Expertise	5.00	5.14	.70

TABLE 7**BRAND ARCHETYPE CLUSTERS AND DESIRES (CHAPTER 3)**

Archetype Cluster	Level of Arousal	Influence on Others	Archetype	Human Desire
Sense of Calm	Calming	Individual, Intimate	Caregiver	Service
	Calming	Neutral	Innocent	Safety
	Calming	Neutral	Everyman	Belonging
	Calming	Aggregate, Societal	Sage	Wisdom
Sense of Wonder	Neutral	Neutral	Explorer	Freedom
	Neutral	Neutral	Creator	Innovation
Positive Emotional Engagement	Arousing	Individual, Intimate	Lover	Intimacy
	Arousing	Individual, Intimate	Jester	Enjoyment
	Arousing	Individual, Intimate	Magician	Power
High Societal Influence	Arousing	Aggregate, Societal	Hero	Mastery
	Arousing	Aggregate, Societal	Outlaw	Liberation
	Arousing	Aggregate, Societal	Ruler	Control

TABLE 8

NONPROFIT FIT RESULTS (CHAPTER 3, PRETEST 3)

Product Extension	Fit Dimension	Mean	Mean	<i>p</i> value
Online Costume Shop		<i>Skittles</i>	<i>Milk Duds</i>	
	Typical Consumer	3.59	3.97	.355
	Product Features	4.03	3.70	.490
	Relevant Firm Experience	2.32	3.37	.027
	Technical Expertise	2.95	3.43	.231
Telescopes		<i>Jeep</i>	<i>Nissan</i>	
	Typical Consumer	3.95	3.55	.328
	Product Features	3.18	4.35	.007
	Relevant Firm Experience	2.67	2.81	.717
	Technical Expertise	3.21	3.87	.088
Silent Meditation Retreats		<i>BBC</i>	<i>Netflix</i>	
	Typical Consumer	3.54	3.27	.512
	Product Features	4.00	3.93	.886
	Relevant Firm Experience	3.28	2.77	.225
	Technical Expertise	3.67	3.73	.888

TABLE 9

FUNCTIONALITY VERSUS SYMBOLISM (CHAPTER 3, PRETEST 4)

Brand	Functional		Symbolism				Functionality vs. Personality		Functionality vs. Prestige	
	<i>M</i>	<i>SD</i>	Personality Expression		Prestige		<i>F</i>	<i>p</i> (sig)	<i>F</i>	<i>p</i> (sig)
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>				
Skittles	0.63	1.09	-0.68	1.23	-0.25	1.32	31.44	<0.001	15.57	<0.001
Milk Duds	0.97	1.28	-0.98	1.43	-0.82	1.18	64.13	<0.001	39.15	<0.001
Jeep	1.11	0.94	1.11	0.86	0.66	1.17	0.00	1.000	3.46	0.072
Nissan	1.33	0.99	-0.49	1.28	-0.52	1.70	78.88	<0.001	49.20	<0.001
Netflix	1.31	0.85	-0.36	1.16	0.17	1.17	71.87	<0.001	37.75	<0.001
BBC	0.53	1.22	0.26	1.09	0.33	1.09	3.00	0.094	1.39	0.249

TABLE 10

FIT PERCEPTIONS OF MASTER GARDENER CLASS WITH LEGO AND NERF

(CHAPTER 3, STUDY 2 PRETEST)

	<i>LEGO</i>	<i>NERF</i>	
Fit Dimension	Mean	Mean	<i>p</i> value
Typical Consumer	4.06	4.36	.440
Product Features	4.13	4.29	.686
Relevant Firm Experience	3.70	4.02	.437
Technical Expertise	3.65	4.15	.205

FIGURES

FIGURE 1

SCREE PLOT SOLUTION DIMENSIONALITY (CHAPTER 1, STUDY 1A)

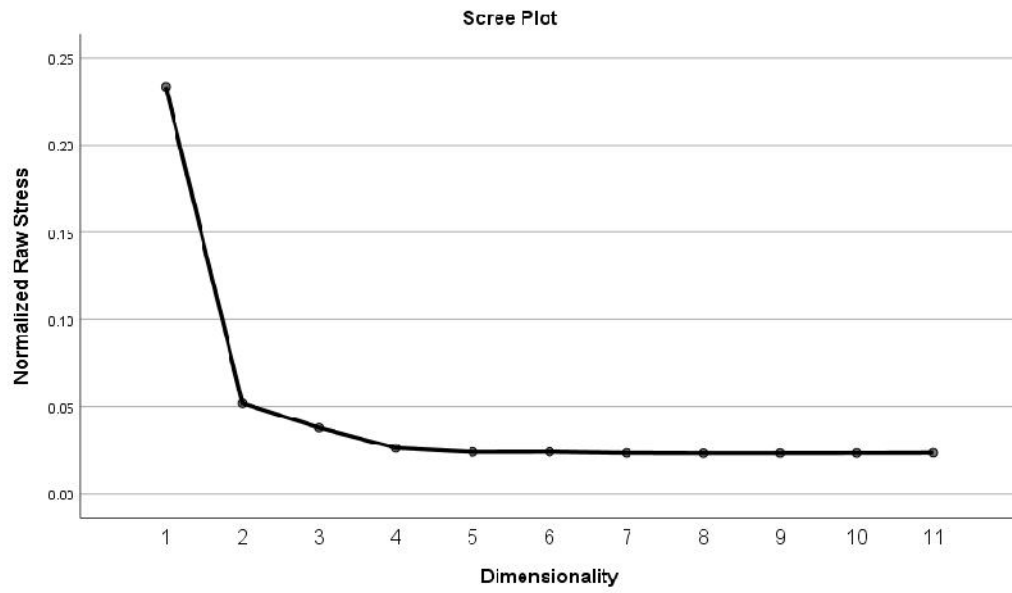


FIGURE 2

ARCHETYPES' MULTIDIMENSIONAL SCALING SOLUTION (CHAPTER 1, STUDY 1A)

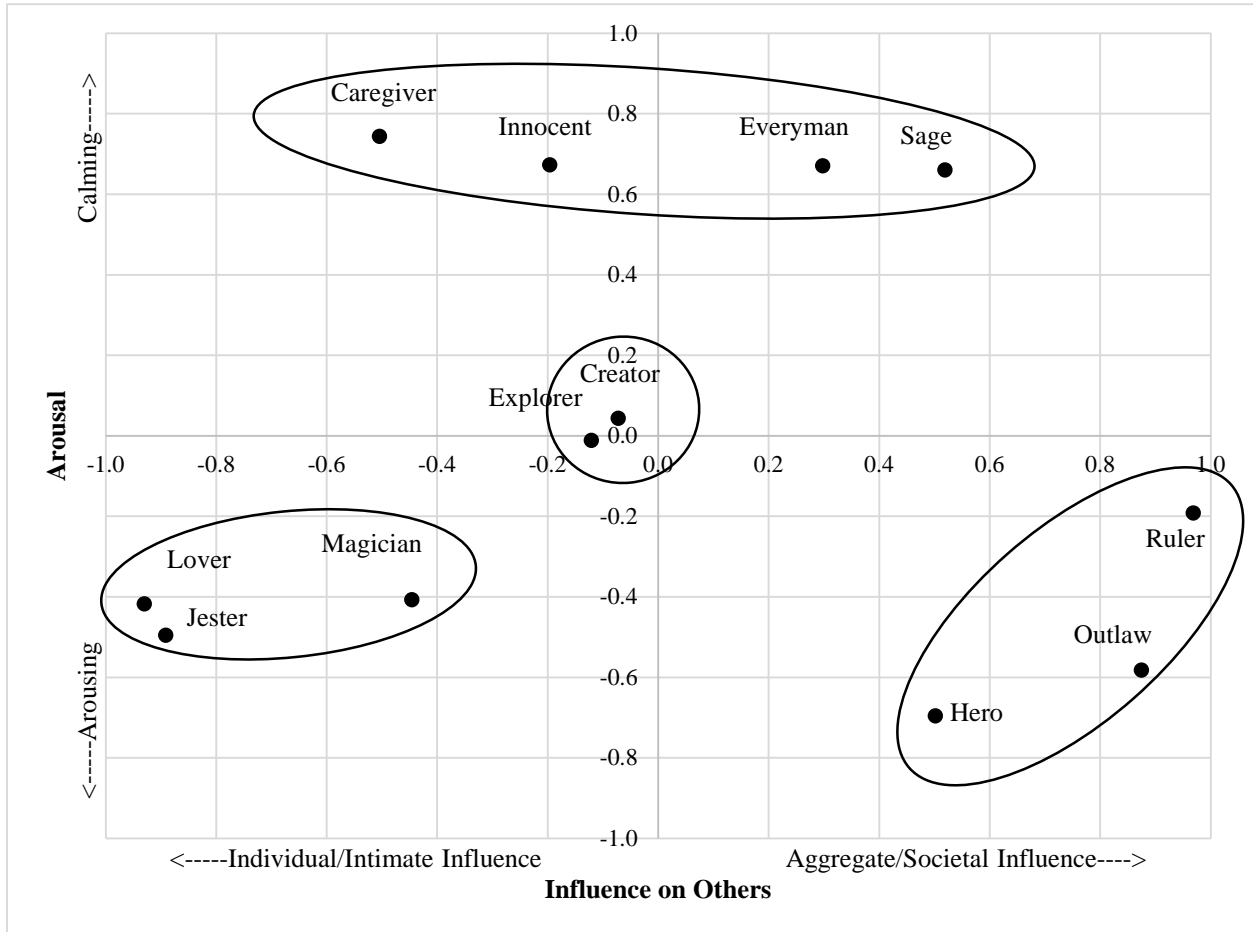


FIGURE 3

REFINED BRAND ARCHETYPE CLASSIFICATION VERSUS ORIGINAL

CLASSIFICATION (CHAPTER 1, STUDY 1A)

REFINED CLASSIFICATION BASED ON RESULTS FROM STUDY 1A



ORIGINAL CLASSIFICATION FROM MARK AND PEARSON (2001)



FIGURE 4

CONCEPTUAL MODEL (CHAPTER 2)

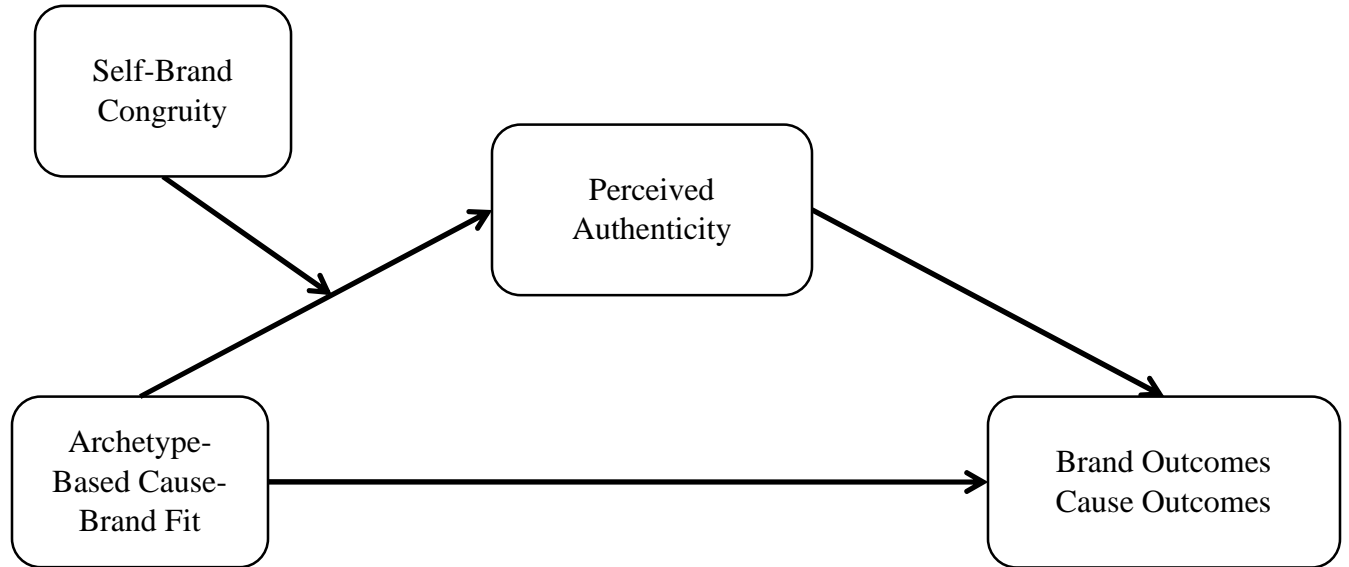
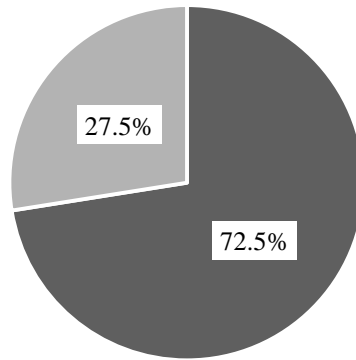


FIGURE 5

STUDY 1 RESULTS – PARTNERSHIP SUCCESS (CHAPTER 2, STUDY 1)

A

WHICH BRAND WILL BE MORE SUCCESSFUL AS A PARTNER?



■ High cause-brand fit ■ Low cause-brand fit

B

PARTNERSHIP SUCCESS AS A FUNCTION OF ARCHETYPE-BASED CAUSE-BRAND

FIT

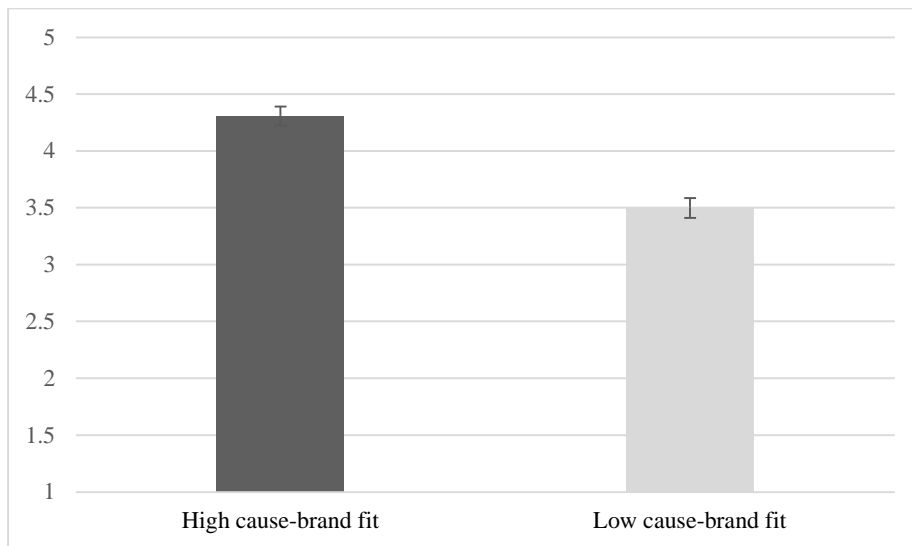
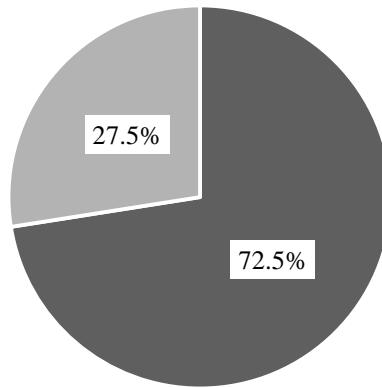


FIGURE 6

STUDY 1 RESULTS – DONATION LIKELIHOOD (CHAPTER 2, STUDY 1)

A

WHICH PARTNERSHIP WOULD YOU DONATE TO?



■ High cause-brand fit ■ Low cause-brand fit

B

DONATION LIKELIHOOD AS A FUNCTION OF HIGH AND LOW ARCHETYPE-BASED

CAUSE-BRAND FIT

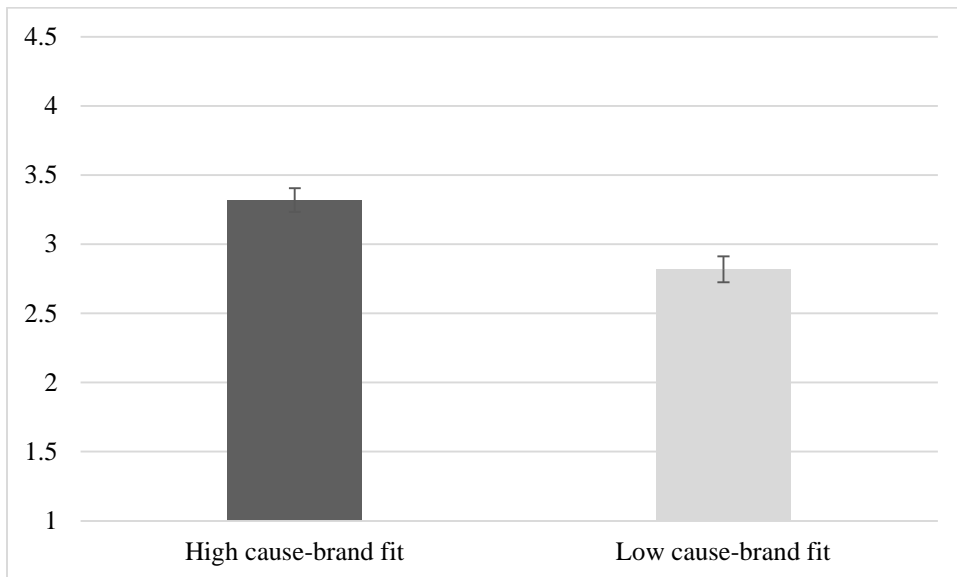
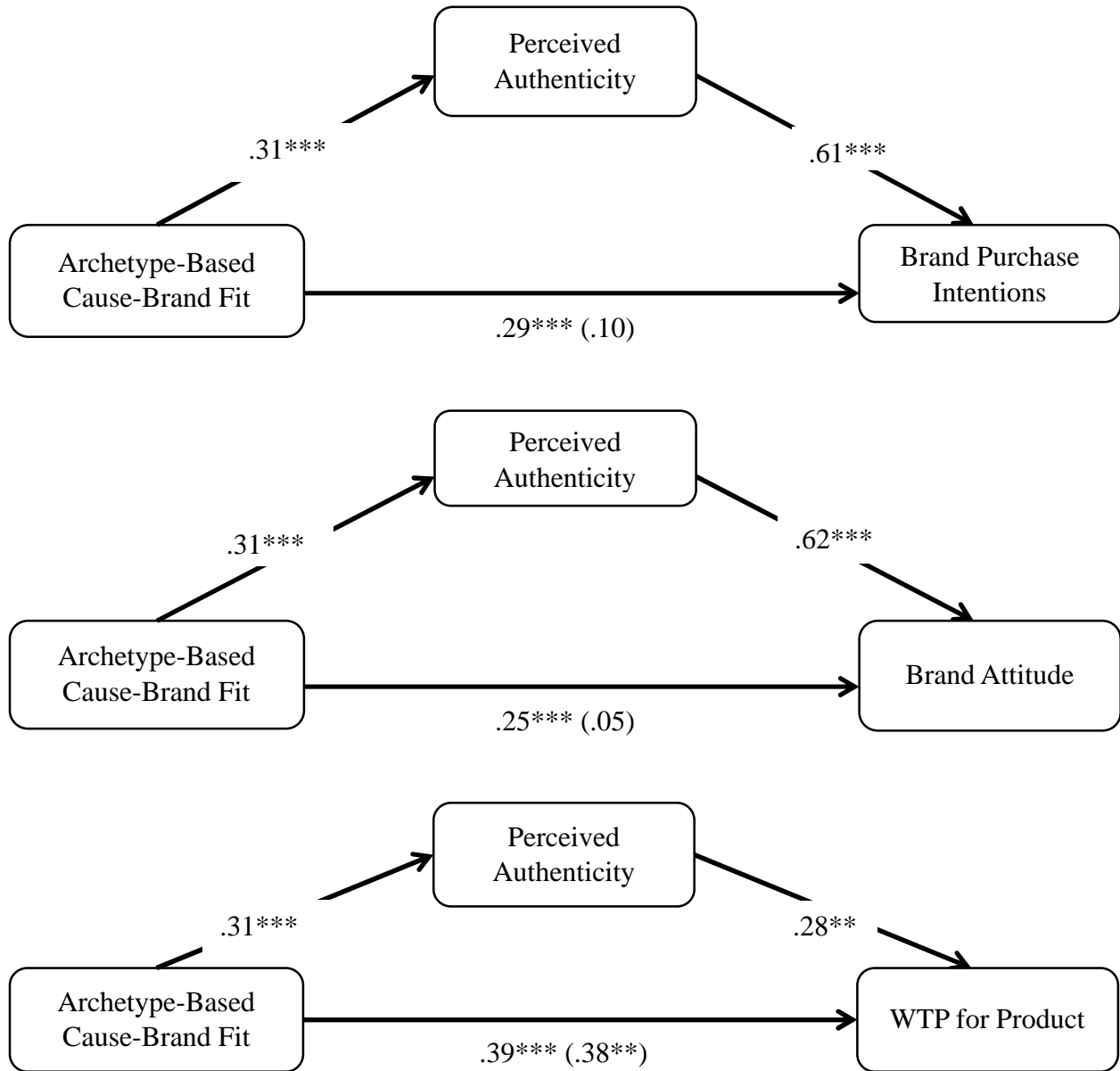


FIGURE 7

MEDIATING EFFECT OF PERCEIVED AUTHENTICITY ON BRAND OUTCOMES

(CHAPTER 2, STUDY 2)

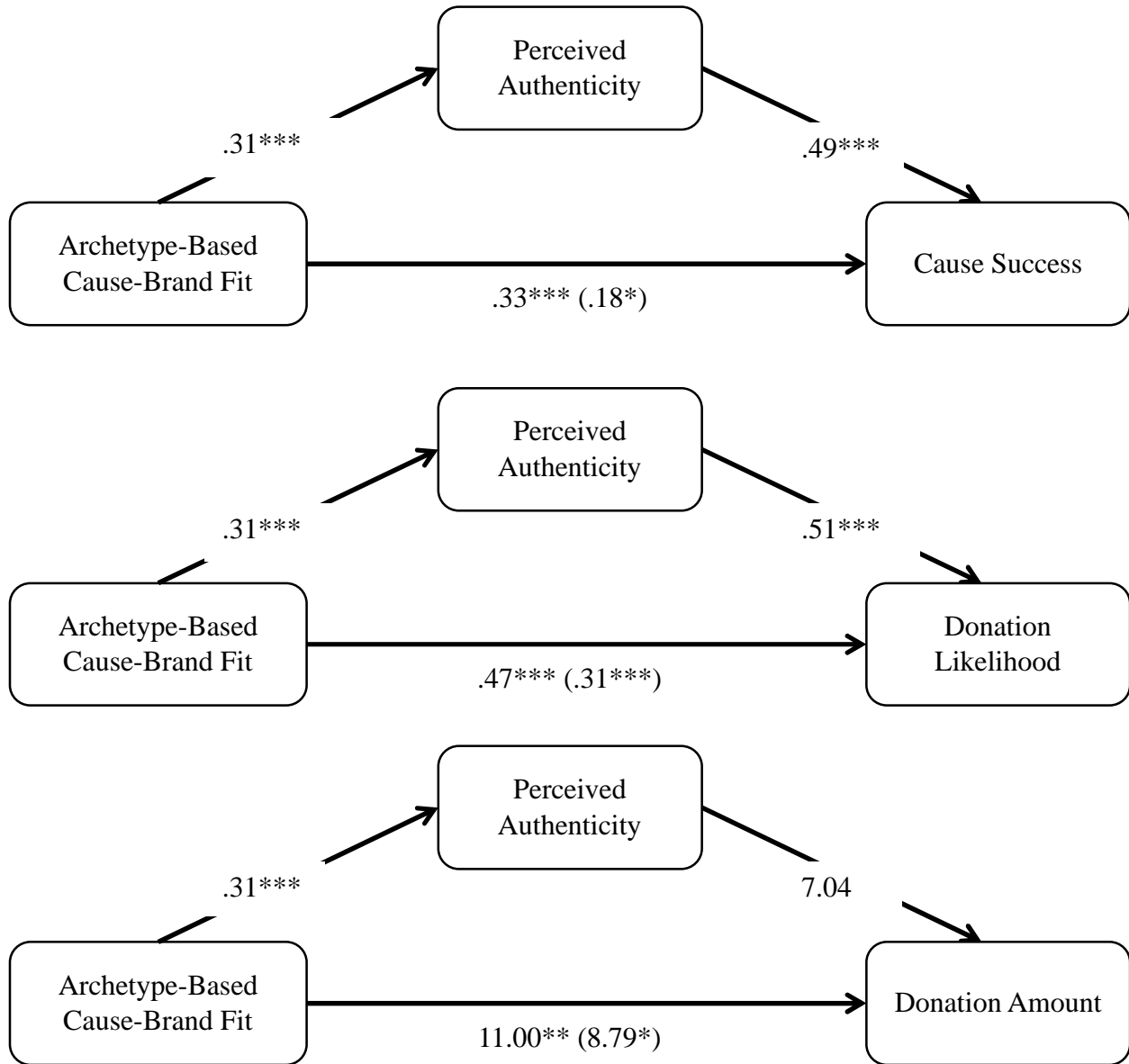


Note. All coefficients are unstandardized, and the value in parentheses is the coefficient when including the mediator in the regression. * $p < .05$, ** $p < .01$, *** $p < .001$

FIGURE 8

MEDIATING EFFECT OF PERCEIVED AUTHENTICITY ON CAUSE OUTCOMES

(CHAPTER 2, STUDY 2)



Note. All coefficients are unstandardized, and the value in parentheses is the coefficient when including the mediator in the regression. * $p < .05$, ** $p < .01$, *** $p < .001$

FIGURE 9

THE EFFECT OF HIGH VERSUS LOW ARCHETYPE-BASED CAUSE-BRAND FIT ON
PERCEIVED AUTHENTICITY AS A FUNCTION OF SELF-BRAND CONGRUITY

(CHAPTER 2, STUDY 3)

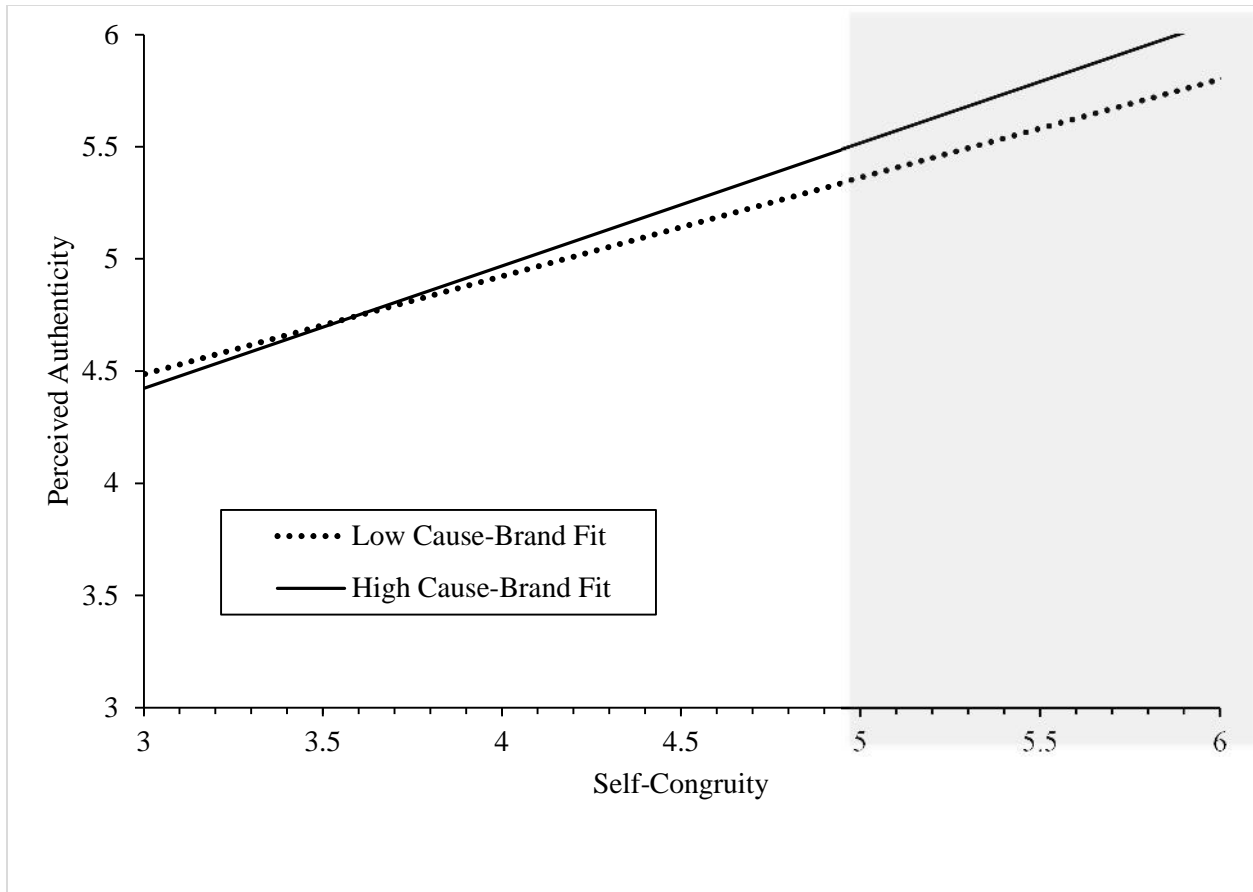


FIGURE 10

THE EFFECT OF HIGH VERSUS LOW OVERALL CAUSE-BRAND FIT ON PERCEIVED AUTHENTICITY AS A FUNCTION OF SELF-BRAND CONGRUITY

(CHAPTER 2, STUDY 4)

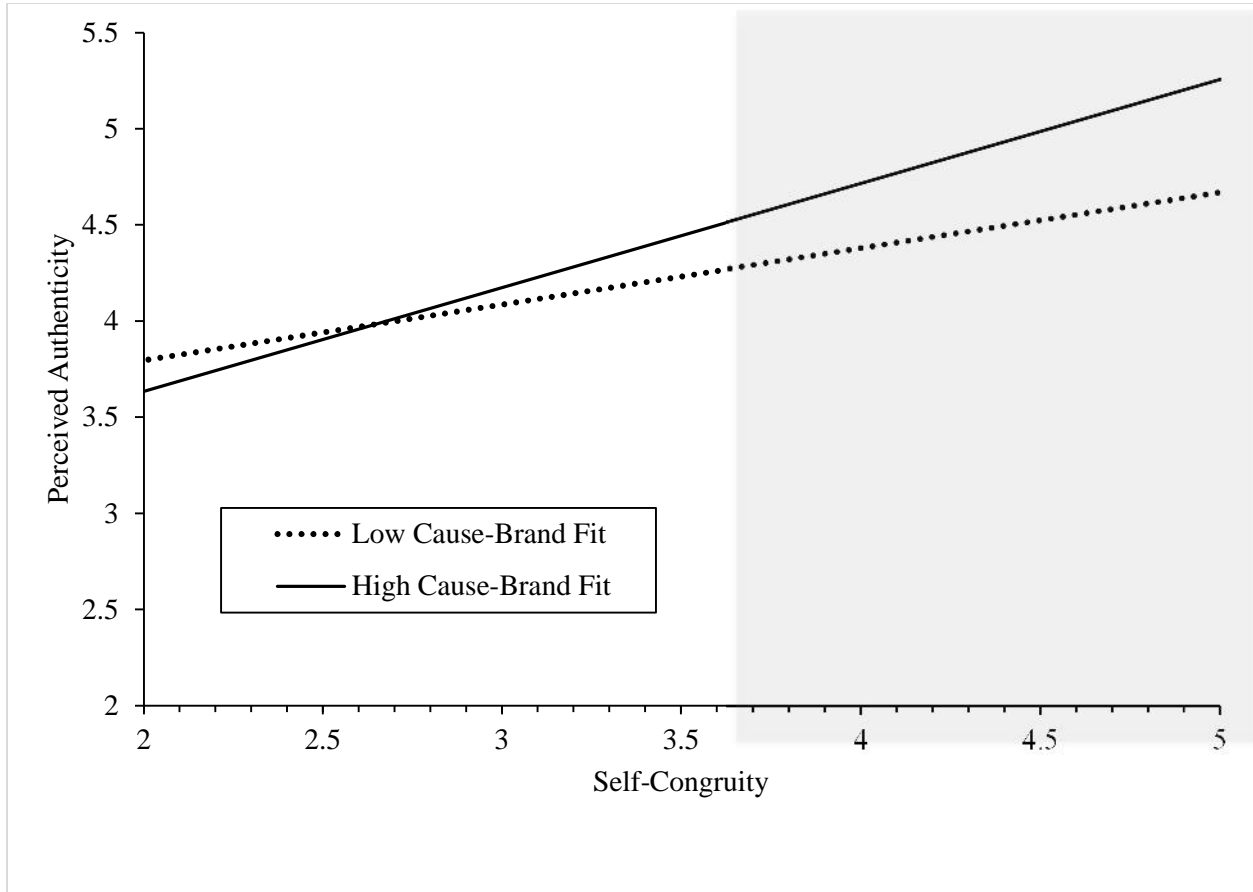


FIGURE 11

HYPOTHESIS 3 CONCEPTUAL MODEL (CHAPTER 3)

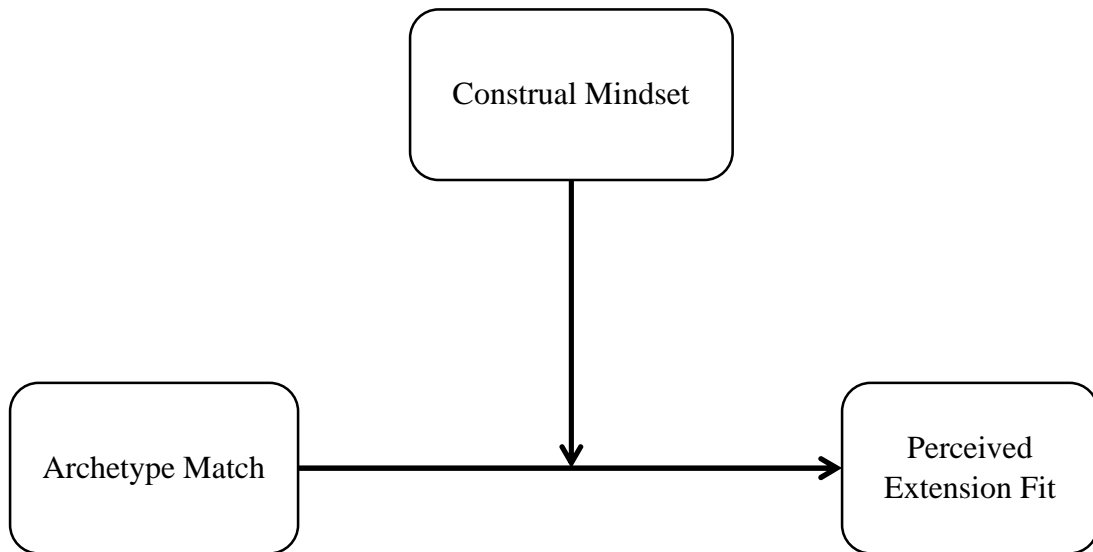


FIGURE 12

PERCEIVED FIT OF BRAND EXTENSION (CHAPTER 3, STUDY 1)

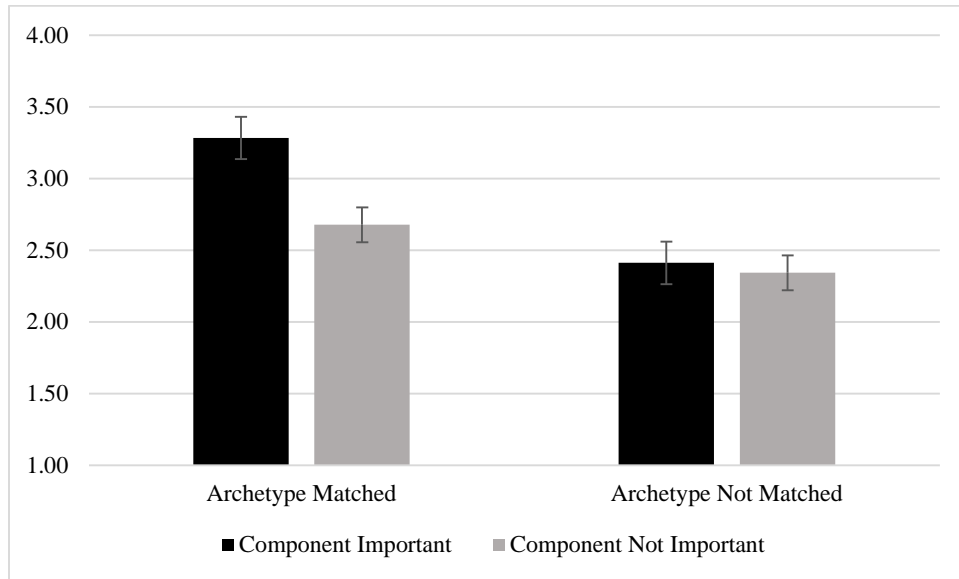


FIGURE 13

PREDICTED SUCCESS OF BRAND EXTENSION (CHAPTER 3, STUDY 1)

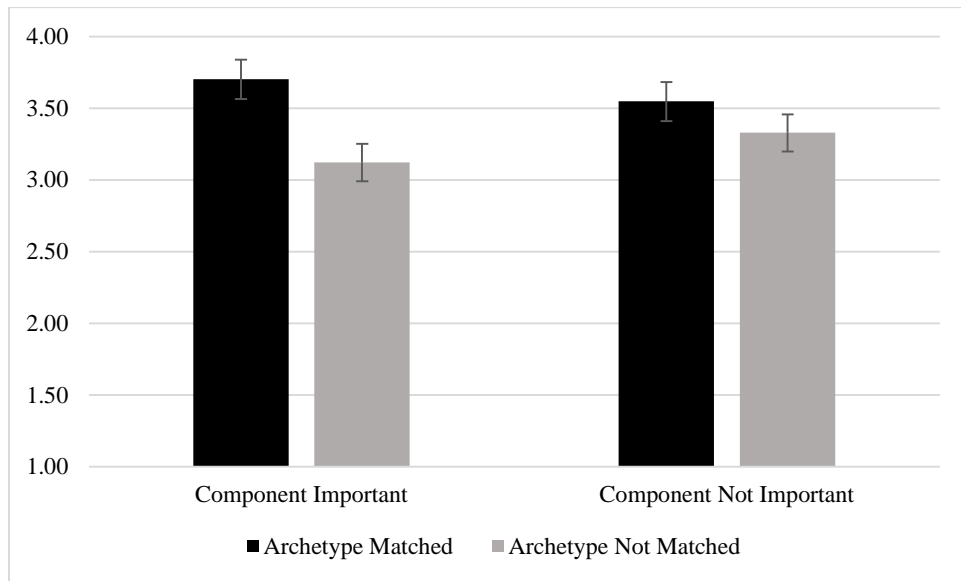


FIGURE 14

LIKELIHOOD OF BUYING BRAND EXTENSION (CHAPTER 3, STUDY 1)

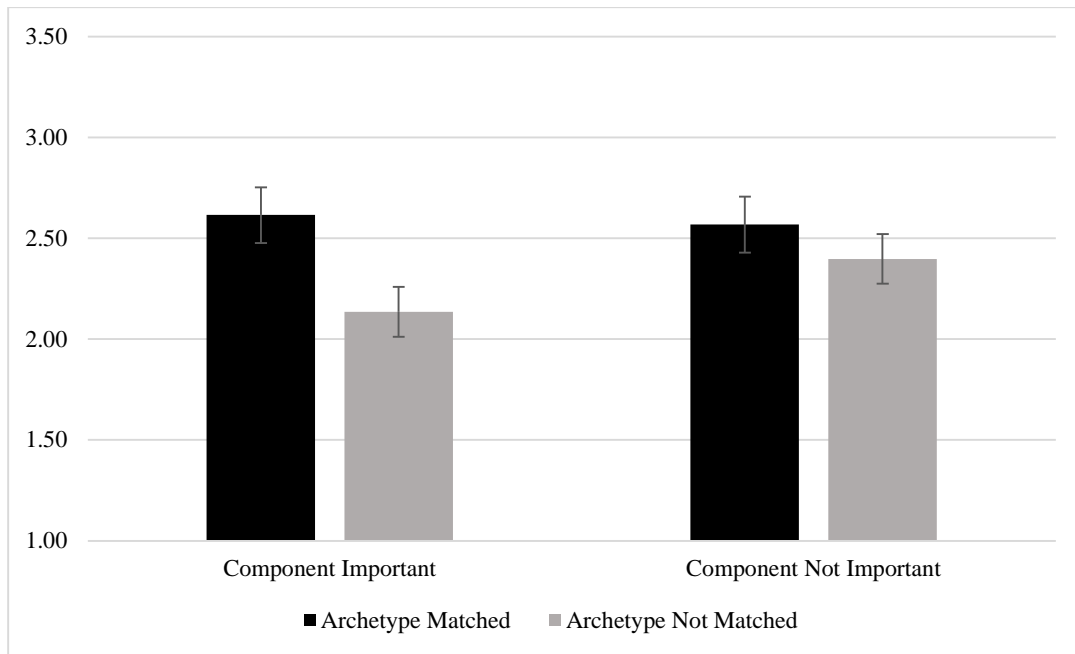
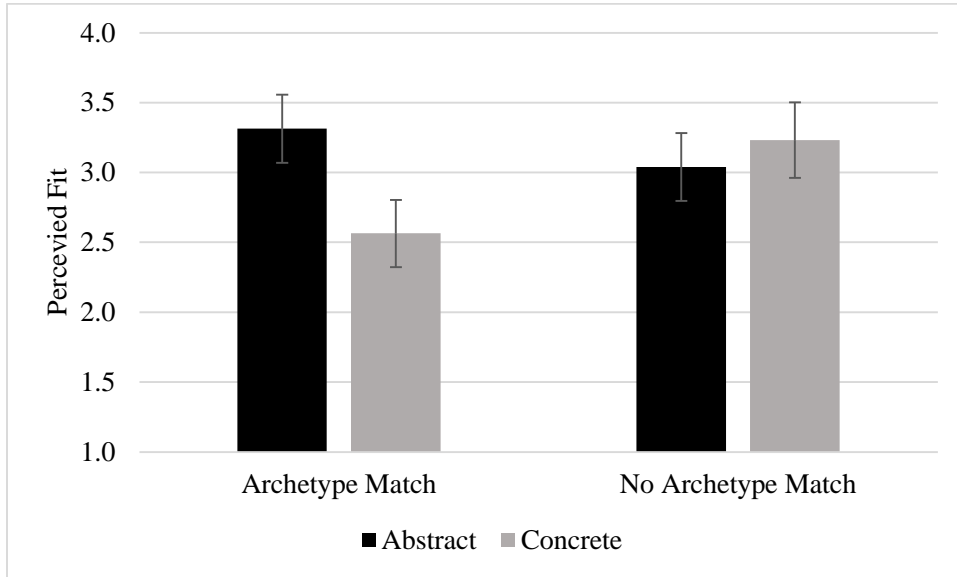


FIGURE 15

PERCEIVED FIT AS A FUNCTION OF CONSTRUAL MINDSET AND BRAND

EXTENSION ARCHETYPE MATCH (CHAPTER 3, STUDY 2)



APPENDIX

ARCHETYPE DESCRIPTION

In branding, there are several methods to designing and understanding brands. Whereas brand personality is based in describing a series of characteristics that define a brand (such as sincere, wholesome, exciting, etc.), a brand archetype centers a brand in a rich narrative structure in which the brand has a clear driving force or motivation.

An archetype is described as a pattern of ideas and way of thinking that is shaped by our culture. An archetype represents a universally understood character that provides emotional prompts to fundamental human desires. For example, Captain America is a hero archetype – he exhibits goodness and struggles against moral evils in order to restore harmony and justice to society.

In this task we are asking you to read the profile of an archetype and determine how well different brands represent that archetype. For each of the archetype profiles you will see: Desire, Goal, Fear, Strategy, Trap, and Gift.

A **Desire** outlines the main motivating desire of the archetype.

A **Goal** defines the main motivating outcome for the archetype.

A **Fear** defines what the archetype fears most.

A **Strategy** outlines the major plans of action the archetype would use in order to achieve its goal and desire.

A **Trap** are actions or qualities that the archetype possesses that could get it in trouble or veer it away from its goal.

A **Gift** are the qualities that are unique to the archetype that would help it achieve success.

TWELVE ARCHETYPES

Caregiver

Desire: protect people from harm

Goal: to help others

Fear: selfishness, ingratitude

Strategy: do things for others

Trap: martyrdom of self, entrapment of others

Gift: compassion, generosity

Creator

Desire: create something of enduring value

Goal: give form to a vision

Fear: having a mediocre vision or execution

Strategy: develop artistic control and skill, create culture, express own vision

Trap: perfectionism, miscreation

Gift: creativity and imagination

Everyman

Desire: connection with others

Goal: to belong, fit in

Fear: standing out, seeming to put on airs, and being exiled or rejected as a result

Strategy: develop ordinary solid virtues, the common touch, blend in

Trap: give up self to blend in, in exchange for only a superficial connection

Gift: realism, empathy, lack of pretense

Explorer

Desire: the freedom to find out who you are through exploring the world

Goal: to experience a better, more authentic, more fulfilling life

Fear: getting trapped, conforming, inner emptiness, nonbeing

Strategy: journey, seek out and experience new things, escape from entrapment and boredom

Trap: aimless wandering, becoming a misfit

Gift: autonomy, ambition, ability to be true to one's own soul

Hero

Desire: prove one's worth through courageous and difficult action

Goal: exert mastery in a way that improves the world

Fear: weakness, vulnerability, wimping out

Strategy: become as strong, competent, and powerful as you are capable of being

Trap: arrogance, developing a need for there always to be an enemy

Gift: competence and courage

Innocent

Desire: to experience paradise

Goal: to be happy

Fear: doing something wrong or bad that will provoke punishment

Strategy: do things right

Gift: faith and optimism

Jester

Desire: to live in the moment with full enjoyment

Goal: to have a great time and lighten up the world

Fear: boredom or being boring

Strategy: play, make jokes, be funny

Trap: frittering away one's life

Gift: joy

Lover

Desire: attain intimacy and experience sensual pleasure

Goal: being in a relationship with the people, the work, the experiences, the surroundings they love

Fear: being alone, a wallflower, unwanted, unloved

Strategy: become more and more attractive physically, emotionally, and in every other way

Trap: doing anything and everything to attract and please others, losing identity

Gift: passion, gratitude, appreciation, commitment

Magician

Desire: knowledge of the fundamental laws of how the world or universe works

Goal: make dreams come true

Fear: unanticipated negative consequences

Strategy: develop vision and live it

Trap: becoming manipulative

Gift: finding win-win outcomes

Outlaw

Desire: revenge or revolution

Goal: to destroy what is not working (for the Outlaw or the society)

Fear: being powerless, trivialized, inconsequential

Strategy: disrupt, destroy, or shock

Trap: to go over to the dark side, criminality

Gift: outrageousness, radical freedom

Ruler

Desire: control

Goal: create a prosperous, successful family, company, or community

Fear: chaos, being overthrown

Strategy: exert leadership

Trap: being bossy, authoritarian

Gift: responsibility, leadership

Sage

Desire: the discovery of truth

Goal: to use intelligence and analysis to understand the world

Fear: being duped, misled, ignorance

Strategy: seek out information and knowledge; become self-reflective and understand thinking processes

Trap: can study issues forever and never act

Gift: wisdom, intelligence

CHAPTER 1, STUDY 1A

How similar is ARCHETYPE X to ARCHETYPE Y?

- 1 = Not similar at all, 7 = Very similar

If a person possessed the characteristics common to X, how likely is it that they would also possess the characteristics common to Y?

- 1 = Very unlikely, 7 = Very likely

How would you express the degree of overlap between ARCHETYPE X to ARCHETYPE Y?



Table A1. Mean Similarity for All Archetype Pairs

ARCHETYPE X	ARCHETYPE Y	N	Mean	SD	<i>t</i> stat*	<i>p</i> value
Caregiver	Creator	57	3.71	1.45	-1.53	0.133
Caregiver	Everyman	53	3.82	1.44	-0.89	0.379
Caregiver	Explorer	54	2.25	1.18	-10.97	0.000
Caregiver	Hero	53	4.08	1.46	0.41	0.686
Caregiver	Innocent	57	4.42	1.28	2.45	0.018 [†]
Caregiver	Jester	55	2.78	1.17	-7.73	0.000
Caregiver	Lover	57	4.35	1.43	1.86	0.068
Caregiver	Magician	54	2.80	1.05	-8.42	0.000
Caregiver	Outlaw	56	1.73	1.16	-14.67	0.000
Caregiver	Ruler	54	2.94	1.47	-5.30	0.000
Caregiver	Sage	54	3.44	1.28	-3.22	0.002
Creator	Everyman	54	2.93	1.23	-6.44	0.000
Creator	Explorer	56	4.01	1.32	0.03	0.973
Creator	Hero	57	3.73	1.24	-1.63	0.108
Creator	Innocent	54	3.29	1.16	-4.50	0.000
Creator	Jester	53	3.11	1.34	-4.81	0.000
Creator	Lover	53	3.17	1.35	-4.49	0.000
Creator	Magician	54	3.78	1.44	-1.11	0.274
Creator	Outlaw	59	1.86	1.07	-15.30	0.000
Creator	Ruler	59	3.67	1.64	-1.57	0.123
Creator	Sage	55	3.79	1.34	-1.18	0.245
Everyman	Explorer	56	3.13	1.31	-4.97	0.000

Everyman	Hero	54	3.35	1.35	-3.54	0.001
Everyman	Innocent	53	4.27	1.20	1.64	0.106
Everyman	Jester	60	3.49	1.34	-2.92	0.005
Everyman	Lover	51	4.42	1.20	2.48	0.016 [†]
Everyman	Magician	53	2.77	1.20	-7.42	0.000
Everyman	Outlaw	58	1.90	0.88	-18.22	0.000
Everyman	Ruler	54	2.14	0.98	-13.92	0.000
Everyman	Sage	55	2.95	1.21	-6.45	0.000
Explorer	Hero	59	4.20	1.32	1.19	0.240
Explorer	Innocent	58	3.25	1.21	-4.70	0.000
Explorer	Jester	51	3.65	1.24	-2.00	0.051
Explorer	Lover	55	3.41	1.42	-3.06	0.003
Explorer	Magician	53	3.80	1.39	-1.06	0.296
Explorer	Outlaw	57	3.29	1.32	-4.09	0.000
Explorer	Ruler	53	2.65	1.24	-7.93	0.000
Explorer	Sage	55	4.69	1.25	4.10	0.000 [†]
Hero	Innocent	58	3.29	1.43	-3.77	0.000
Hero	Jester	52	2.24	1.07	-11.83	0.000
Hero	Lover	55	3.33	1.30	-3.83	0.000
Hero	Magician	55	3.71	1.11	-1.95	0.056
Hero	Outlaw	57	2.90	1.39	-6.00	0.000
Hero	Ruler	55	3.78	1.44	-1.12	0.266
Hero	Sage	55	3.76	1.11	-1.57	0.122
Innocent	Jester	55	3.80	1.48	-1.00	0.320
Innocent	Lover	53	3.89	1.29	-0.64	0.527
Innocent	Magician	53	2.99	1.38	-5.35	0.000
Innocent	Outlaw	56	1.65	1.20	-14.66	0.000
Innocent	Ruler	57	2.23	1.27	-10.51	0.000
Innocent	Sage	56	3.48	1.36	-2.89	0.005
Jester	Lover	56	3.56	1.30	-2.53	0.014
Jester	Magician	56	3.41	1.39	-3.21	0.002
Jester	Outlaw	54	2.38	1.49	-8.00	0.000
Jester	Ruler	53	1.99	1.08	-13.59	0.000
Jester	Sage	57	2.63	1.33	-7.75	0.000
Lover	Magician	59	3.18	1.31	-4.87	0.000
Lover	Outlaw	57	2.11	1.02	-14.08	0.000
Lover	Ruler	53	2.59	1.27	-8.10	0.000
Lover	Sage	59	2.96	1.37	-5.88	0.000
Magician	Outlaw	55	2.64	1.31	-7.68	0.000
Magician	Ruler	55	3.43	1.37	-3.09	0.003
Magician	Sage	62	4.27	1.35	1.57	0.122

Outlaw	Ruler	55	2.86	1.67	-5.05	0.000
Outlaw	Sage	54	2.10	1.29	-10.82	0.000
Ruler	Sage	56	3.01	1.33	-5.55	0.000

Gray shading indicates pairs are perceived as significantly different

**t* stat calculated against mean value of 4 (i.e., no difference)

† Pairs perceived as significantly more similar

CHAPTER 1, STUDY 1B

Personality Traits

How likely is it that a person embodying the archetype [Lover] would be [PERSONALITY TRAIT]:

- 1 = Extremely Likely, 7 = Extremely Unlikely (reverse coded for analysis)
- Traits: *Adventurous, Arrogant, Authoritative, Brave, Caring, Competent, Creative, Exciting, Fearful, Humorous, Imaginative, Innocent, Intelligent, Kind, Likeable, Manipulative, Naïve, Rebellious, Relatable, Rugged, Sensual, Sincere, Sophisticated, Trustworthy, Wise*

CHAPTER 1, STUDY 2

Keeping in mind the description above, please rate the extent to which you feel that the listed brand represents the [Sage] archetype.

- 1 = Extremely bad fit, 6 = Extremely good fit (or ‘Not familiar with this brand’)
- Brands: *Adobe, Amazon, Apple, Barnes and Noble, Charmin, Coca-Cola, Delta, Disney, Dove, Ferrari, GE, Google, Harley Davidson, Huggies, Jeep, Johnny Walker, Lego, Levi Jeans, M&Ms, McDonald’s, Mercedes-Benz, Microsoft, National Geographic, Nike, REI, Skittles, Subway, US Bank, Victoria’s Secret, Xbox*

CHAPTER 2, PRETEST 2

Nonprofit Organization Descriptions

Jester

The Senior Juggling Center is a nonprofit physical therapy group that helps seniors improve or maintain their coordination by hosting fun and interactive juggling classes. All participants are given a set of juggling balls and walked through a series of playful exercises that strengthen motor skills with the ultimate goal of learning how to juggle.

[Brand] is considering a social marketing campaign that partners with the Senior Juggling Center to raise money and support the physical health of senior citizens.

Explorer

The Discovery Air and Space Museum is a new nonprofit museum that plans to host the world's largest collection of historic aircraft and spacecraft. It is also a vital center for historical research on the science and technology behind the exploration of sky and space.

[Brand] is considering a social marketing campaign that partners with the Discovery Air and Space Museum to raise money to fund new exhibits and increase awareness of the museum.

Creator

The Young Entrepreneur Council is an organization for entrepreneurs 40 and under. They help budding entrepreneurs create new businesses through forums, offline events, and an editorial team that can help with content development. Their mission is to help young entrepreneurs build successful businesses and keep them running.

[Brand] is considering a social marketing campaign that partners with the Young Entrepreneur Council to raise money for entrepreneurs trying to build new companies.

Perceived Fit Measures

How likely is it that the **typical consumer** of [brand] would benefit from the [nonprofit]?

- 1 = Not at all likely, 7 = Extremely likely

Would the **product features** of [brand] be useful to the [nonprofit]?

- 1 = Not useful at all, 7 = Very useful

To what extent does [brand] have **experience** related to that of the [nonprofit]?

- 1 = No experience at all, 7 = A lot of experience

To what extent does [brand] have the **technical expertise** related to that required of the [nonprofit]?

- 1 = No expertise at all, 7 = A lot of expertise

CHAPTER 2, STUDY 1

Manipulations

Jester

High Cause-brand fit: Skittles + Senior Juggling Center

Low Cause-brand fit: Milk Duds + Senior Juggling Center

Explorer

High Cause-brand fit: Jeep + Discovery Air and Space Museum

Low Cause-brand fit: Nissan + Discovery Air and Space Museum

Creator

High Cause-brand fit: LEGO + Youth Entrepreneur Council

Low Cause-brand fit: NERF + Youth Entrepreneur Council

Measures

Perceived Fit

How well does the [Nonprofit] fit with the [High-Fit Brand]?

- 1 = Does not fit at all, 7 = Fits extremely well

How well does the [Nonprofit] fit with the [Low-Fit Brand]?

- 1 = Does not fit at all, 7 = Fits extremely well

Predicted Success

Which of the following brands do you think would be more successful as a partner to the [Nonprofit]?

- Dichotomous: [High-Fit Brand], [Low-Fit Brand]

How successful do you think the [Nonprofit] would be with [High Cause-Brand Fit] as a partner?

- 1 = Not successful at all, 7 = Extremely successful

How successful do you think the [Nonprofit] would be with [Low-Fit Brand] as a partner?

- 1 = Not successful at all, 7 = Extremely successful

Donation Intentions

Which of the following would you donate to?

- Dichotomous: [High-Fit Brand], [Low-Fit Brand]

If [High-Fit Brand] partnered with the [Nonprofit], how likely would you be to make a donation?

- 1 = Extremely unlikely, 7 = Extremely likely

If [Low-Fit Brand] partnered with the [Nonprofit], how likely would you be to make a donation?

- 1 = Extremely unlikely, 7 = Extremely likely

Archetype Representativeness of Nonprofit

To what extent is a [nonprofit] representative of the [X] archetype?

- 1 = Not representative at all, 7 = Extremely representative

CHAPTER 2, STUDY 2

Archetype-Based Cause-Brand Fit Manipulations

High Cause-Brand Fit

The **Senior Juggling Center** is a nonprofit physical therapy group that helps seniors improve or maintain their coordination by hosting fun and interactive juggling classes. All participants are given a set of juggling balls and walked through a series of playful exercises that strengthen motor skills with the ultimate goal of learning how to juggle.

Skittles is considering a social marketing campaign that partners with the Senior Juggling Center to raise money and support the physical health of senior citizens.

Low Cause-Brand Fit

The **Discovery Air and Space Museum** is a new nonprofit museum that plans to host the world's largest collection of historic aircraft and spacecraft. It is also a vital center for historical research on the science and technology behind the exploration of sky and space.

Skittles is considering a social marketing campaign that partners with the Discovery Air and Space Museum to raise money to fund new exhibits and increase awareness of the museum.

Measures

Perceived CSR Authenticity (adapted from Alhouti et al. 2016)

Please answer the following questions about the partnership between Skittles and [nonprofit].

The company's nonprofit partnership is genuine.

The company's nonprofit partnership preserves what the company means to me.

The company's nonprofit partnership captures what makes the company unique to me.

The company's nonprofit partnership is in accordance with the company's values and beliefs.

The company is being true to itself with its nonprofit partnership.

The company is standing up for what it believes in.

The company is a socially responsible company.

The company is concerned about improving the well-being of society.

- 1 = Strongly disagree, 7 = Strongly agree

Brand Outcomes

After hearing about their new partnership with [nonprofit], what is your overall attitude towards Skittles?

- 1 = Unfavorable, 7 = Favorable
- 1 = Bad, 7 = Good

In response to learning about Skittles' partnership with [nonprofit], what is the likelihood you would purchase a bag of Skittles?

- 1 = Unlikely, 7 = Likely
- 1 = Improbable, 7 = Probable

How much more would you be willing to pay for a bag of Skittles, knowing that they are partnered now with [nonprofit]?

- Sliding scale \$1 - \$10

Cause Outcomes

How successful do you think the [nonprofit] would be with Skittles as a partner?

- 1 = Extremely unsuccessful, 7 = Extremely successful

With Skittles as the partner brand, how likely would you be to make a donation to the [nonprofit]?

- 1 = Unlikely, 7 = Likely
- 1 = Improbable, 7 = Probable

With Skittles as the partner brand, how much would you donate, in a one-time donation, to the [nonprofit]?

- Open-ended

Nonprofit-Archetype Fit

How well do you think the [nonprofit] fits with the JESTER brand archetype?

- 1 = Low fit, 7 = High fit
- 1 = Dissimilar, 7 = Similar
- 1 = Inconsistent, 7 = Consistent

CHAPTER 2, STUDY 3

Archetype-Based Cause-Brand Fit Manipulations

High Cause-Brand Fit

LEGO has been looking for a cause to partner with to run a social marketing campaign. They have decided to partner with the **Young Entrepreneur Council** that wants to raise money for entrepreneurs trying to build new companies.

The Young Entrepreneur Council is an organization for entrepreneurs 40 and under. They offer support through forums, offline events, and an editorial team that can help with content development. Their mission is to help young entrepreneurs get their businesses started and keep them running.

Low Cause-Brand Fit

NERF has been looking for a cause to partner with to run a social marketing campaign. They have decided to partner with the **Young Entrepreneur Council** that wants to raise money for entrepreneurs trying to build new companies.

The Young Entrepreneur Council is an organization for entrepreneurs 40 and under. They offer support through forums, offline events, and an editorial team that can help with

content development. Their mission is to help young entrepreneurs get their businesses started and keep them running.

Measures

Perceived CSR Authenticity

- Same scale as in Chapter 2, Study 2

Brand Attitude

After hearing about their new partnership with [nonprofit], what is your overall attitude towards [Brand]?

- 1 = Negative, 7 = Positive
- 1 = Unfavorable, 7 = Favorable
- 1 = Bad, 7 = Good

Donation Likelihood

With [Brand] as the partner brand, how likely would you be to make a donation to the [nonprofit]?

- 1 = Unlikely, 7 = Likely
- 1 = Improbable, 7 = Probable

Self-Brand Congruity

Please rate your agreement with the following statements.

The [Brand] brand is congruent with the image I hold of myself.

The [Brand] brand is congruent with the image I would like to hold of myself.

The [Brand] brand is congruent with the image others hold of myself.

The [Brand] brand is congruent with the image I would like others to hold of myself.

- 1 = Strongly disagree, 7 = Strongly agree

CHAPTER 2, STUDY 4

Overall Cause-Brand Fit Manipulations

High Cause-Brand Fit

LEGO has been looking for a cause to partner with to run a social marketing campaign. They have decided to partner with the **Young Entrepreneur Council** that wants to raise money for entrepreneurs trying to build new companies.

The Young Entrepreneur Council is an organization for entrepreneurs 40 and under. They offer support through forums, offline events, and an editorial team that can help with content development. Their mission is to help young entrepreneurs get their businesses started and keep them running.

Low Cause-Brand Fit

LEGO has been looking for a cause to partner with to run a social marketing campaign. They have decided to partner with the **Senior Juggling Center** to raise money and support the physical health of senior citizens.

The **Senior Juggling Center** is a nonprofit physical therapy group that helps seniors improve or maintain their coordination by hosting fun and interactive juggling classes. All participants are given a set of juggling balls and walked through a series of playful exercises that strengthen motor skills with the ultimate goal of learning how to juggle.

Measures

Perceived CSR Authenticity

- Same scale as in Chapter 2, Studies 2 and 3

Brand Attitude

- Same scale as in Chapter 2, Study 3

Donation Likelihood

- Same scale as in Chapter 2, Study 3

Self-Brand Congruity

- Same scale as in Chapter 2, Study 3

CHAPTER 3, PRETEST 3

Brand Extension Stimuli

Jester

[Skittles] has created an online Costume Shop with a variety of playful costumes available for rent or purchase. This shop has fun costumes for all occasions and for people of all ages and sizes.

Explorer

[Jeep] now sells a line of telescopes. Their new telescopes allow even the inexperienced astronomer to explore the world and skies like never before.

Sage

[The BBC (British Broadcasting Corporation)] now offers silent meditation retreats. They have experienced meditation guides who lead retreats for those looking to be enlightened, practice mindfulness, and experience sustainable transformation.

Perceived Fit

How likely is it that the **typical consumer** of [brand] would want to use [extension]?

- 1 = Not at all likely, 7 = Extremely likely

Would the **product features** of [brand] be useful in [extension category]?

- 1 = Not useful at all, 7 = Very useful

To what extent does [brand] have **experience** related to [extension]?

- 1 = No experience at all, 7 = A lot of experience

To what extent does [brand] have the **technical expertise** related to that required to [create/own extension]?

- 1 = No expertise at all, 7 = A lot of expertise

CHAPTER 3, PRETEST 4

Functional and Symbolic Measures (Bhat and Reddy 2001)

Functionality

[BRAND] was for people who are down to earth.

- 1 = Strongly Disagree, 7 = Strongly Agree

On a scale from 1 – 7, rate the practicality of the [BRAND] brand.

On a scale from 1 – 7, rate the practicality of the user of the [BRAND] brand.

Symbolism – Personality Expression

People use [BRAND] as a way of expressing their personality.

[BRAND] is for people who want the best things in life.

A [BRAND] user stands out in a crowd.

Using [BRAND] says something about the kind of person you are.

- 1 = Strongly Disagree, 7 = Strongly Agree

Please rate the brand on the following attributes [1 = Low, 7 = High]:

Symbolic

Status symbol

Symbolism – Prestige

Please rate the brand on the following attributes [1 = Low, 7 = High]:

Prestigious

Exciting

Distinctive

Please rate users of the brand, [BRAND] on the following attributes:

[9-point Likert scale]

1. Sophisticated – simple
2. Not at all – very romantic*
3. Not at all – very successful*
4. Unique – ordinary
5. Stylish – plain
6. Expressive – subdued
7. Glamorous – sedate
8. Not at all – very elegant*

*Reverse scored

CHAPTER 3, STUDY 2

Construal Level Manipulations

Concrete, “how,” mindset

People have been cooking at home more recently. We are interested in your thoughts about healthy cooking. We are particularly interested in HOW you might go about preparing a healthy meal. For example, what actions do you take when cooking healthy, and what specific foods you might buy to eat healthy? **Please take some time below to explain HOW you go about preparing a healthy meal.**

Abstract, “why,” mindset

People have been cooking at home more recently. We are interested in your thoughts about healthy cooking. We are particularly interested in WHY you might prepare a healthy meal. For example, what might be the reasons and motivations for cooking healthy food, and for what purpose might you prepare a healthy meal? **Please take some time below to explain WHY you go about preparing a healthy meal.**

Construal Level Manipulation Check

While thinking about preparing a healthy meal, I was thinking about:

- 1 = How to prepare a healthy meal, 9 = Why to prepare a healthy meal
- 1 = The process of preparing a healthy meal, 9 = The reasons for preparing a healthy meal

Brand Fit Manipulation

High Brand Fit

LEGO now offers a Master Gardener class to help consumers create their own garden. LEGO will provide education and resources for home and urban gardeners to grow their own vegetables, learn about plants and flowers, and be creative in the yard!

Low Brand Fit

NERF now offers a Master Gardener class to help consumers create their own garden. NERF will provide education and resources for home and urban gardeners to grow their own vegetables, learn about plants and flowers, and be creative in the yard!

Perceived Fit

How do you think the [brand], brand fits with a Master Gardener class? (1 – 7 scale)

- Low fit/High fit
- Dissimilar/Similar
- Inconsistent/Consistent
- Not complementary/Complementary