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Full Length Research Paper

Brand management in a transforming economy: An examination of the South African petroleum industry

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When a nation is establishing a new identity and making recompense for exclusively regulated economy of recent history, the corporate marketing function must respond. A new paradigm is required if the communities that comprise future markets are to favour businesses whose success is based on the economic exclusivity of the past. As the economy deregulate – inclusive of the previously disadvantaged communities that become economically active, acquire motor vehicles and face the decision as to which petroleum products to buy: the established petroleum retailers have to pay attention to their brand management. This paper examines perceptions of branding in the South Africa petroleum retail industry based on the views of senior representatives of the retailers, regulators and industry associations. It finds that the contribution of South African petroleum retailers to black economic empowerment are variable, and that a new paradigm is needed to assure future patronage by newly empowered consumers.

Key words: Brand management, petroleum marketing, black economic empowerment and petroleum industry.

INTRODUCTION

The importance of brands and branding has attracted a great deal of attention from academics and practitioners, for reasons that are quite easy to understand. A strong brand contributes to marketing success and branding stimulates consumer-brand interaction. However, brand management can be complex because of the internal and external factors that bear upon it. For example, it is common for co-branding to be adopted by popular brands, requiring competition and co-operation between businesses (Hotka, 2006) and in other cases there are social issues that bear upon branding in different ways (Lantos, 2003; Keller and Moorthi, 2003). A single company whose name is virtually unknown to the consumer could consider co-branding (or brand alliance) with others whose names are known, as it happens when the Windows and Intel logos are prominent on computers that are made by unknown companies (Owers, 2000; Jameset al., 2006). A single company might also promote a number of brands that compete with each other, as in the case of the many soap powders promoted by Proctor and Gamble (Uggla, 2006).

When compared with the simple case of a single business, a single product and a single brand, these practices make special demands on the brand management. Rather than seeing a brand as stand alone silos with consequences to fail and under-perform, it should form cooperative alliance with competitor and consumer society (Aaker and Joachimsthler, 2000). In emerging markets the application of "conventional" branding strategies may not be relevant (Keller and Moorthi, 2003). At the same time, emerging markets are especially important to the future of established global businesses, many of which have saturated their traditional markets and should now apply branding strategies that are suitable to the peculiar needs of emerging economies for expansion opportunities (Krake, 2005).

This paper explores the importance of branding strategies in the South African petroleum retailing industry and the consequential relationships between petroleum retailers and their customers. Petroleum retailing is a sector with strong brands and South African markets are rapidly

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changing following the liberalisation of South African society. These factors – petroleum brands and the changing South African market are examined in this paper.

DEREGULATION AND EMERGING ECONOMIES

As some national economies deregulate and emerging economies takes shape, market and competitive forces change. It might be expected that the competitive strength of companies within those economies will depend greatly on their image, as created through marketing and brand management. In emerging economies, where there are no "established" brands, aggressive branding strategies might be needed. Branding for increased market share is the ultimate objective of many organizations as it provides them numerous benefits, such as competitive advantage, increased profitability, improved relations with alliance partners and co-branding opportunities (Delgado-Ballester and Munuera-Alema´n, 2005: 187).

According to Terry and Frank (1990: 17) "deregulated society means a society free from government-imposed restrictions, directives or orders". This shift away from the sovereignty of government makes an opportunity for sovereignty at the level of the consumer. Consumers who had no choice under a sovereign government are now empowered and enabled to choose. As a result, industry is presented with the need to strategise and must choose to differentiate themselves from their competition, for example by cost, or by quality of goods and service (Knox, 2005; Porter, 1980: 63). A company's success now depends on a branding strategy that is capable of improving market share and brand equity to augment the quality of consumer-brand relationships (Ngai, 2005). The appreciation and patronage of products and services offering occur on a long-term rather than a short-term basis. Kotler (1991: 221) brings deregulation and competition together when he argues that an increase in competition as a result of deregulation will leave companies with no choice but to cultivate competitiveness, by paying as much attention to competitors and their strategies as to the needs of their target customers. A good brand strategy can be used to protect and defend a company's products and services against existing and potential competitors, as expected in the case of the South African petroleum retail industry.

THE SOUTH AFRICAN PETROLEUM INDUSTRY

The South African petroleum industry was under exclusive regulation during the apartheid era (for example by the 1979 Petroleum Products Amendment Act and related legislation). This made it almost impossible for the consumer to benefit from choice and quality of service such as is possible in an all inclusive deregulated economy. Presently, the industry is undergoing considerable change and there is little doubt that its future will be very different to its past. As South African economy continues to deregulate, the petroleum retailing sector needs dynamic branding strategies as an instrument to compete (Petroleum Economist, 1993: 17).

STRUCTURE OF THIS PAPER

This paper examines perceptions of the South African petroleum retailing industry and the need to embark on branding strategies that are relevant to the needs of a deregulated and transforming economy. First, there is consideration of branding from a general viewpoint. Then the approach to the study is explained and the findings are presented. The perceptions of key industry role players are summarised and the role of national government as the driver of social and economic transformation is briefly examined.

BRAND MANAGEMENT

Brand management has long been identified as an important tool for strategic marketing. Aaker's work (1996: 221) explains how powerful brands can be created and argues that the important issue is to identify the exact nature of "brand strength". This is because of the benefits of strong brands to large national and multinational companies: a strong brand assists in maintaining, positioning, repositioning, defending and expanding market share. It can also be used as an instrument to exploit opportunities and improve corporate image.

Brand management and marketing

There is a difference between marketing and brand management, as has been found in the international petroleum industry; it is possible for naïve marketing to achieve no useful result, as has been reported by industry experts commenting on the experiences of Texaco (Shelly and Kevin, 1996: 3). Despite a massive advertising budget, there was a decline in Texaco's revenue; the world's third largest oil firm lost market share to its competitors. Texaco and Shell have since implemented a powerful re-branding strategy to revive its corporate image, with some useful results (Parry, 2002). Shortly after this, other major brands including, Mobil embarked on a similar campaign aimed at augmenting general consumer perceptions of its products (Mark, 2004). As oil companies prepare themselves for the competitive challenges of the future, branding and identifying trademarks or labels are gradually emerging as the industry's preferred marketing tools.

On the basis of the available evidence, good branding consolidates perceptions of value in goods and services on a very wide basis, not just on product or service characteristics, but on all aspects of the relationship between the provider and customer (and also the consumer, where goods or services are purchased by one person for the benefit of another, as in the case of food for the family, or toys for the children). The sum of the goodwill and commitment between provider, customer and consumer is seen and referred to as brand equity (Leiser, 2004; Pappu and Quester, 2006). This concept is widely understood and brand can be destroyed if management fails to develop a brand equity plan (Yoo and Donthu, 2002: 280).

Brand management in changing times

Despite the extent of investment and experiences in branding since the early days, it can be argued that branding in the context of a changing society is not well understood (Onojaefe, 2001). Today more than ever before the phenomena of deregulation, emerging markets, consumer sovereignty and increasing consumers' tastes and choices are all affecting development and deployment of branding strategies (Lawer and Knox, 2006).

The objective of branding is to create enduring relationships based on trust and loyalty, supported by consistent delivery of a company's promised commitment to quality products and good customer services. Holliday and Karen (1997: 58) consider that effective implementation of branding strategy can reduce the risk for customers who must choose between alternatives; this enhances profit margins, accelerates the introduction of new products and improves conversion rates; it also enhances customer retention by raising emotional barriers to departure. Petroleum brands can use branding strategies to improve profitability by recognising and adopting strategies to increase market share (Kotler, 1997: 148). South African petroleum retailers acknowledge the need for branding and understand the huge financial and human resources that will be needed to achieve it. However, flexibility is required to formulate useful brand management strategies (Gordon-Brown, 2001: 36).

It follows that, in the context of deregulation and national transformation, South African petroleum retailers should pay particular attention to the need for flexibility in branding strategies with an investment in brand promotion targeted at previously excluded communities. Brand image is no longer a guarantee of success as brands have been negatively affected by emotional behaviour and market evolution (Cullinane, 2001: 5). To create and maintain brand equity in the new South Africa, it will be important to achieve a balance between current customer perceptions and the potential for increased profit. Perhaps the most interesting feature of the current customer base in South Africa is that it includes a large number of people who previously had no prospect of car ownership and who tend to view large corporate such as the petroleum retailers as contributors to their economic exclusion (Willmott and Nelson, 2003).

THE NEED FOR THIS RESEARCH

What was learnt from this brief review is that oil companies now recognise brand management as a means of reviving, maintaining and improving their overall corporate image and that corporate image relates strongly to corporate performance. However, establishing strong brand equity requires huge investment in terms of time and money and has to be balanced by improved market share and customer retention if profitability is to be improved.

Further, there is a realisation that flexibility is needed and that with changing market conditions (as in the case of the petroleum retailing industry in South Africa) there might be special circumstances that extend beyond current brand management practice in established markets. To achieve a desired return on investment and assets when market conditions are changing, branding strategies are needed that recognise market needs; when a nation is undergoing deregulation and transformation on a massive scale, as in South Africa, a clear understanding of market dynamics becomes important. The past regulatory system – excluded black consumers. This exclusive regulatory system may have led to reduced competition and made it possible for most petroleum retailing companies to operate with little effort in product and service branding. This is no longer the case. Newly empowered consumers are now exercising choices that they never had previously and this creates new challenges for brand management. Also, the Black economic empowerment programme is changing the shape and structure of corporate ownership in large organisations allowing preferential procurement from suppliers and sales to customers. This has created a self-sustaining chain reaction in the economy. However, the success of the transformation exercise is assessed by the level of companies' contribution to scorecard indicators – 25% BEE ownership of all sector of the industry by 2010, and how this might affect the management of brands and brand equity is not clear.

This study therefore sets out to examine the meaning of "brand" and its relationship with brand equity, market share and profitability, as perceived by key role players in the petroleum retailing industry in South Africa.

RESEARCH DESIGN AND METHOD

The choice of the South African petroleum retailing sector was selected for a number of reasons:

i. It is an important component of the overall national economy.
ii. It has been going through a process of deregulation that has stimulated new thinking about industry strategies.
iii. The number of involved organisations is limited.
iv. Senior representatives of those organisations were accessible and

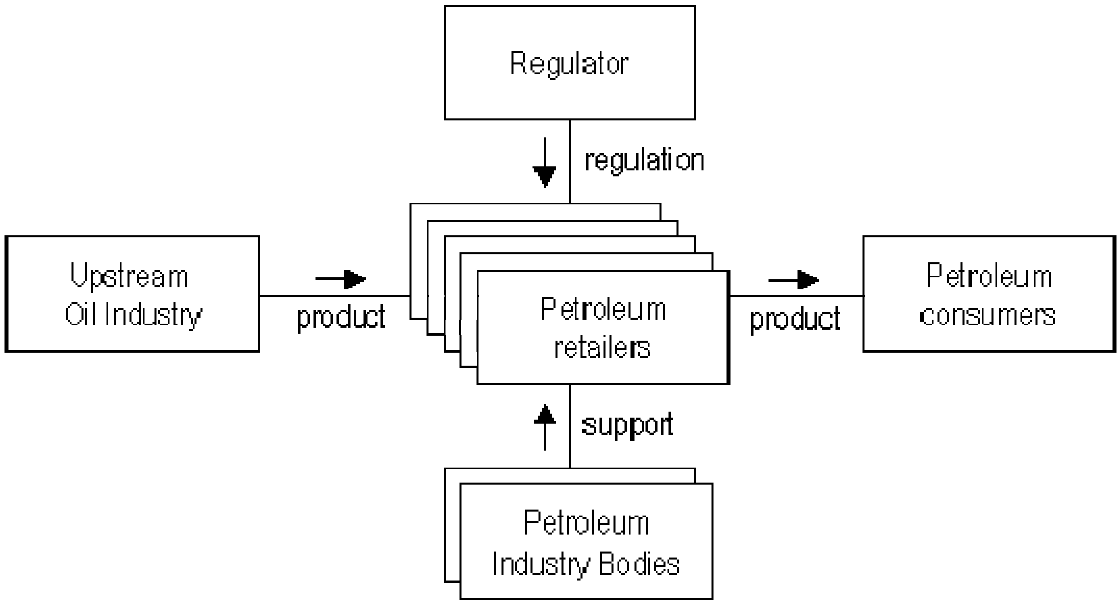

Figure 1. Simplified structure of the governing sources in the petroleum industry.

are interested in this study.
v. Increase in car ownership is a particular consequence of new wealth among “previously disadvantaged individuals” (PDIs).

The combination of these characteristics makes it an interesting, indicative and yet manageable area for an investigation of this nature.

Research design

This research was designed around interviews with senior managers in the industry, complemented by a desk study of other available sources. Because of the relatively small number of companies, it was possible to spend time with managers of each company and therefore to achieve “blanket-cover” of the whole industry at this high level. Since the major oil companies are based in Cape Town, it was possible for them to respond to questionnaire and personal interview. Managers and CEOs of Johannesburg based oil companies were interview using semi-structured questionnaire following initial telephonic and e-mail contact. The viewpoints of interviewees are taken to represent the viewpoints of the companies or organisations they work for, as they were selected for their ability to represent those organisations on the issues examined in this paper. Through these interviews, this study tests the perceptions, viewpoints and opinions of managers on the deregulated industry regarding brands and branding contribution to market share, brand equity, and black economic empowerment.

The analysis of the interview data was supplemented by examination of website material, annual reports, internal news letters, brochures and other relevant document that show evidence of branding activities of the each organisation.

Method

The relatively small number of role players in the South African petroleum retailing market made it possible to investigate each of the significant players, and personal interview and semi-structured questionnaires were used to achieve this. A qualitative study like this is a means to understand and analyse a social phenomenon through interpretation of the views, opinions and perceptions of respondents and the results of the analysis are therefore not to be generalised across industries or countries (Myers, 1997).

This qualitative study is not concerned with generalisability of findings and the degree of flexibility in the application of branding strategy; rather it is useful in relation to the development and deployment of model for branding in a changing society (Hammersley and Atkinson, 1992). The research is therefore intended to highlight the importance of using branding with more intensity to compete in a changing consumer market (Creswell, 1994).

The industry

The context within which the petroleum retailing industry works can be summarised according to the movement of product, regulation and representation within the industry, summarised in Figure 1.

i. Product comes from the refinery stage of the “upstream” oil industry (the retailing end is generally referred to as the “downstream” part of the industry), and it is sold and distributed to consumers owning or operating vehicles driven by internal combustion engines.
ii. Regulation is the responsibility of a national authority, the Department of Minerals and Energy and the associated Parliamentary Committee, where national responsibility for strategic stockholding, pricing and the control of competition.
iii. Support is provided by two petroleum industry associations, the South Africa Petroleum Industry Association (SAPIA) and the African Mineral and Energy Forum (AMEF), with responsibility for representing the industry and for lobbying government.

Data acquisition

Twenty five respondents from petroleum retailers in South Africa were

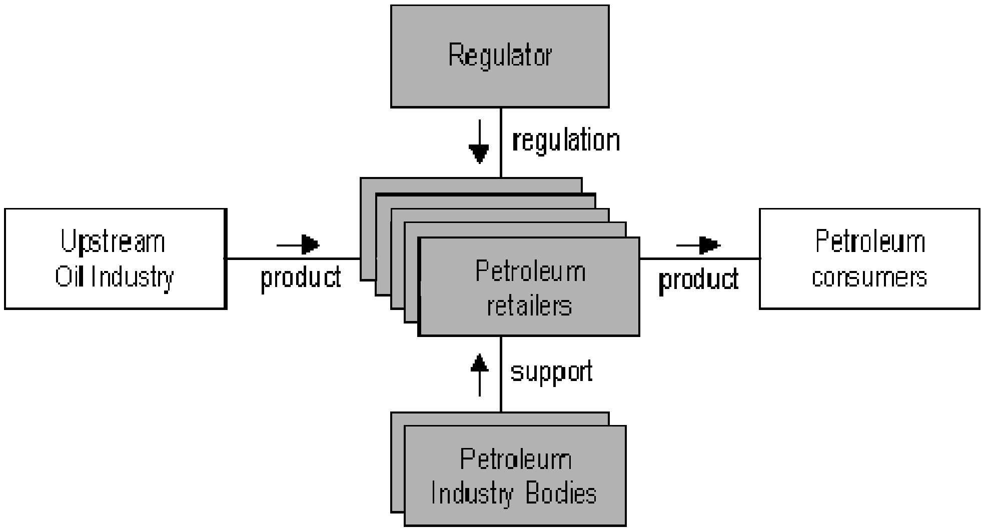

Figure 2. Role players interviewed for the purposes of this study.

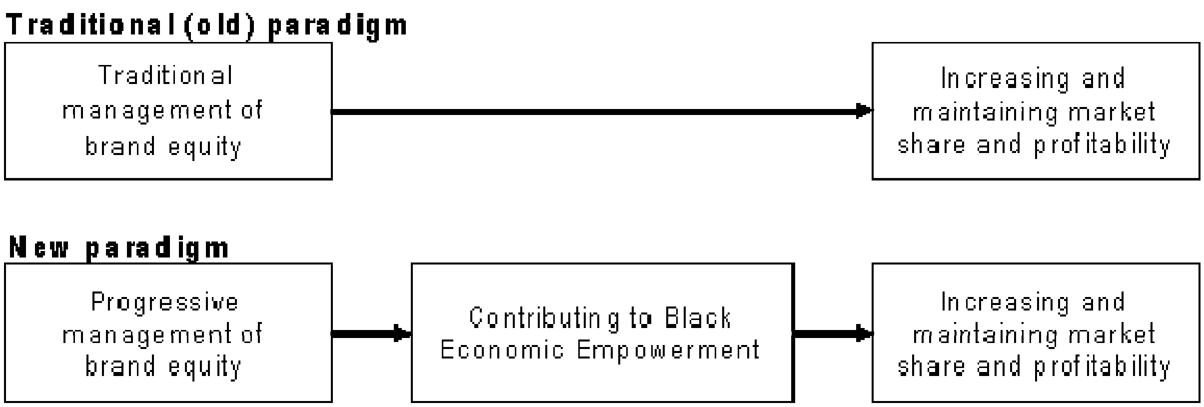

Figure 3. Old and new paradigms.

interviewed, they are all managers concerned with policy making in brand, marketing and corporate affairs. In addition, senior representatives of the two industry associations were interviewed in order to gain important, but different, views of the situation – the South Africa Petroleum Industry Association (SAPIA), and the African Mineral and Energy Forum (AMEF). Finally, regulatory bodies were also interviewed: the Parliamentary Portfolio Committee on Minerals and Energy and (in order to get a provincial view) the Western Cape Department of Minerals and Energy. Interviewing representatives of the other provinces was beyond the scope of the current study, but the views of the Western Cape Department of Minerals and Energy were taken as indicative. (Figure 2).

FINDINGS

Two paradigms

The analysis of responses revealed significant differences in the answers provided by individual respondents. Respondents held conflicting views about brand management and the industry contribution to BEE.

It became clear that some respondents held a traditional view that an investment in building and maintaining brand equity increases and maintains market share, whereas others saw things very differently. Essentially, these views can be summarised as “old” and “new” paradigms (Figure 3. In the new paradigm it is not only about market share; here the need for a contribution to transformation through involvement in black economic empowerment and community development is acknowledged.

This research has shown that brand contribution to societal issues is an important indicator of progressive thinking: a brand enjoys a symbiotic relationship with the markets that are interested or involved with it and this

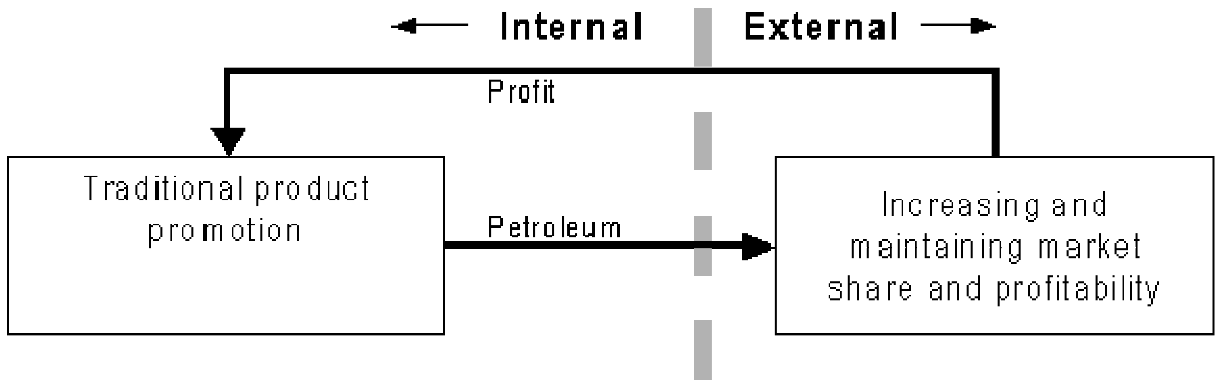

Figure 4. Traditional transactions between petroleum retailers and their customers.

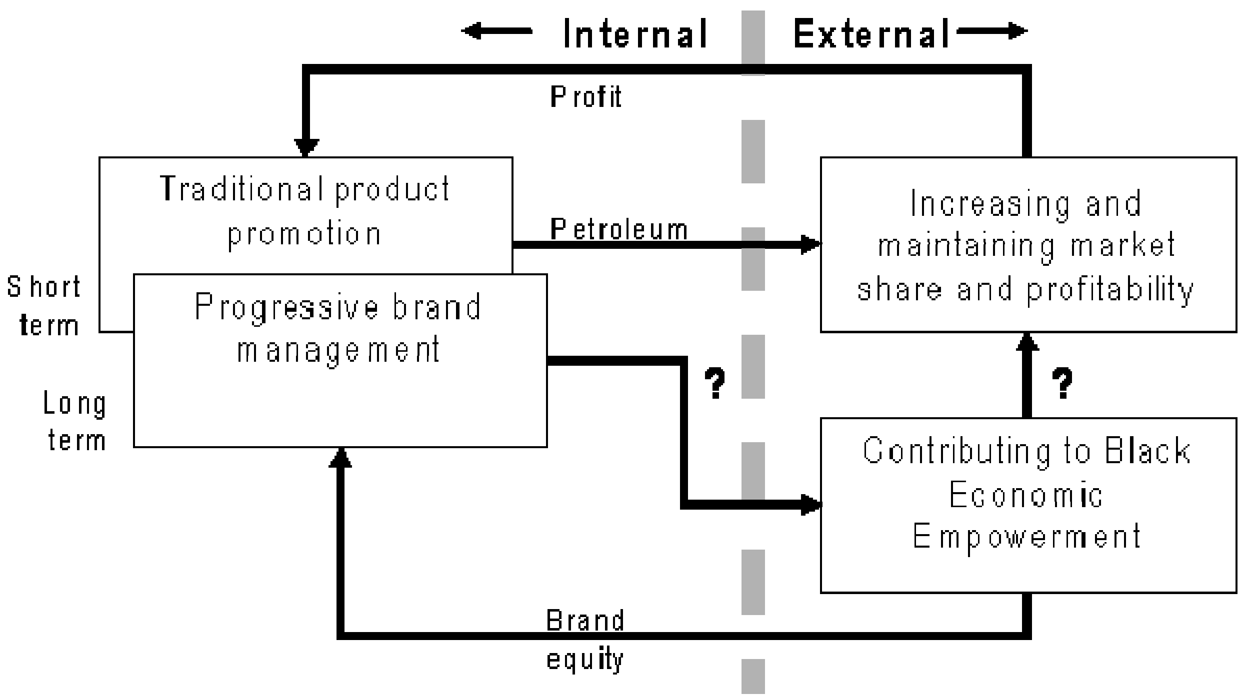

Figure 5. A more progressive relationship between petroleum retailers and their customers.

relationship should emanate from the brand and should be managed for mutual benefit (Bannister, 2001: 12; Struwig and Stead, 2004: 12) (Figure 4).

This conceptualisation of old and new paradigms can be simplified into a single model that clarifies the issues at hand. First, consider the flow of product and profit between a petroleum retailer (on the left) and its customers (on the right): A narrow view of the marketing function, based on simple promotion of products, leads at best to a marginal increased in market share and profit. But this is a short term view and (as found by Texaco) it is possible in the longer term to lose market share. This might be something to do with the management of the relationship with the communities within which customers live and work and the extent to which those communities see petroleum retailers in a positive light: In Figure 5, traditional promotion is supplemented by progressive brand management and there is a presumed contribution to BEE. The nature of that contribution became a focal point for the study, which then focused on the perceptions of respondents about:

i. The meaning of “brand” and its relationship with brand equity, market share and profitability.
ii. The role of marketing campaigns.

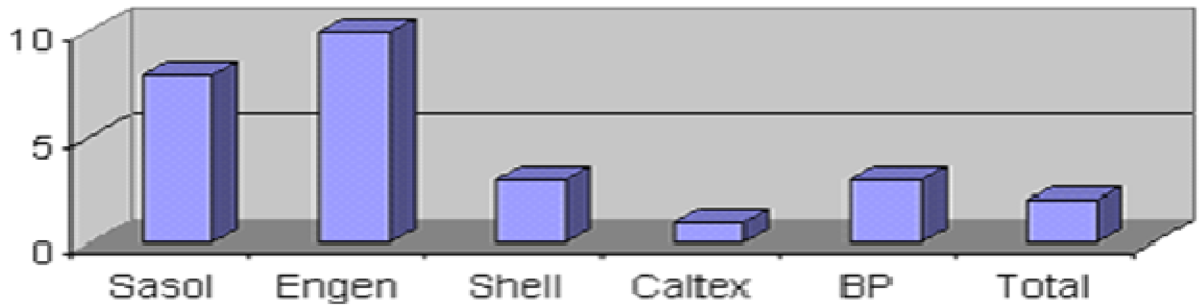

Figure 6. Rated contribution of the "majors" petroleum retailers.

iii. The contribution to black economic empowerment.

Brand equity, market share and profitability

Respondents from the petroleum retailers had different views as to what "branding" and "brand equity" are. There is a common presumption (held by several respondents) that "branding is the identity of the company", or "a process of communication to establish an image and personality", or "the process that is used to intimate consumers with the company's image". One respondent commented that branding seeks "to differentiate a product to add value" which is a tacit admission that the value perceptions of the consumer might be important – this is the opposite of the more common view that the brand is: "that which is confirmed in the mind of the 'potential' customer, used to communicate a particular message or image about a product, be it quality, style etc" – there is no acknowledgement of customers' needs. Another respondent asserted that "a brand can be strong without contributing to social factors". A brand can be adopted and be more effective when it is accepted by community it serves (Beverland, 2005).

Role of marketing campaigns

There was a common presumption that customer service and product quality are the most important elements of successful branding. Some respondents stated further that "a strong brand identifies a product with a specific market segment", thereby recognising the possible differences that might exist between different market segments. There was little acknowledgement of the specific market segment that represents newly-empowered South Africans. One or two respondents note that "a brand brings loyalty and consequent market share …and is therefore a key tool in consumer marketing which identifies with consumers and the social fabric of society". This reference to the "social fabric of society" reveals the relevance of empowerment programme like BEE.

CONTRIBUTION TO BLACK ECONOMIC EMPOWERMENT

Five critical success factors were used as indicators of commitment to assess the contribution to black economic empowerment (Onojaefe, 2001).

i. Share equity: To what extent there is an effort to spread shareholding into previously disadvantaged individual.
ii. Corporate social investment: Sports sponsorship and all other forms of contribution to the needs of Black South Africans.
iii. Dealership: Efforts to enable dealerships that provide new employment and empowerment opportunities to previously disadvantaged persons.
iv. Procurement: Similarly, efforts to insist on procurement from suppliers from previously disadvantaged persons.
v. Employment equity: Pro-active employment of previously disadvantaged persons by means of affirmative action.

The responses were determined with likert scale and are used to assess the extent to which respondents believed each of these indicators might be true in their own company. The result is shown as a rating of the companies' contributions to the five indicators (Figure 6). The rating of 21% and 27% shows the companies with most commitment to BEE. A further study is needed to clarify this since there is no evidence to confirm it. It also suggests that there is an opportunity to incentivise companies for their commitment[1]. The rating of companies by respondents shows the petroleum retailers who were putting most effort into BEE. The results are presented below in two groups: the "majors" (internationally known names) and the "locals" (South African businesses involved in petroleum retailing – newly established empowerment companies with a small percentage of market-share in the down stream sector).

As can be seen from Figure 6, there was some agree-

[1] It is interesting to note that since this study was undertaken in 2001, there has been rapid development and uptake of "score cards" in major South African industry sectors, used to rank businesses for their suitability for public sector contracts and for the granting of other incentives.

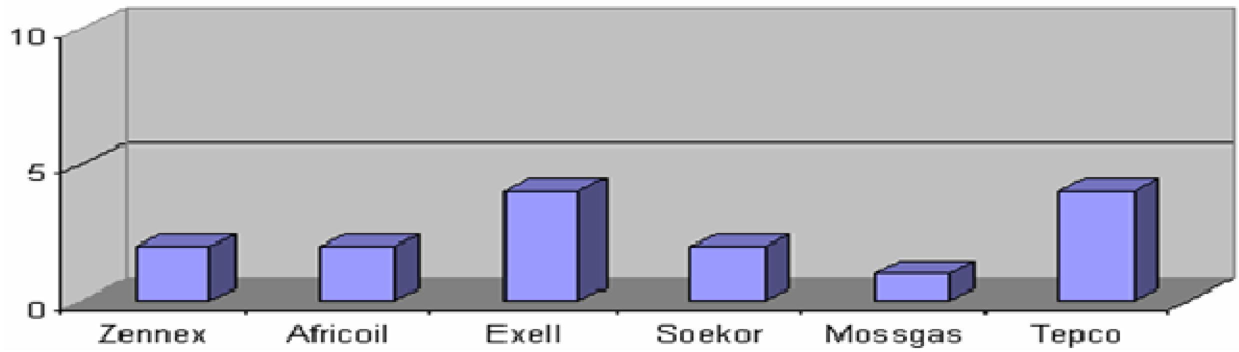

Figure 7. Rated contribution of the "locals".

Table 1. Summary of findings.

Issue	Petroleum retailers	Industry associations	Regulator
Role of branding in newly de-regulated industry	• Take a traditional view based on customer service and product quality • Social responsibility does not form a central part of current priorities • Two thirds subscribe to the old paradigm	• Members (the retailers) still need government assistance to compete in a deregulated scenario • Members cannot be 'cajoled' into accepting government plans to deregulate	• No programme in place to measure the contribution • Retailers claims of progress nothing but window-dressing • Always subject to global factors outside local control (oil price, OPEC quotas)
Brand contribution to community development and black economic empowerment	• There is some (sports sponsorship), but no substantive BEE programmes are in place • Understand the need to develop and focus on specific areas, but can not articulate details of those areas	• Tax relief and similar programmes would help • Real help to communities will lead to economic growth	• Job creation is an important aspect of deregulation. • Targets of 25% of the industry to be under the control of Black Oil Companies • SAPIA (industry association) seen as not committed

ment that Sasol and Engen are making a more significant contribution than the other four major international players.

Generally, the perceived contribution of the "locals" was significantly lower than the perceived contribution of the leaders Sasol and Engen, but similar to (or somewhat lower than) the other four majors (Figure 7). These results are interesting and although at this stage there has been no attempt to unpack the issues and investigate the reason behind these perceptions, it would clearly be useful to look more carefully at what contribution is actually being made and actual reflection of these perceptions (Table 1).

DISCUSSION

Other viewpoints

The discussion so far has focused on the views of respondents from the petroleum retailers, and it is necessary to moderate these views by reference to the industry association views and those of the regulator. When asked, the regulator considered that there is much discussion about transformation, but visible action is not established. This is a mature industry, where the retailers are both partners and competitors at the same time. Faced with deregulation, the industry associations consider that their members will still need government assistance to enable them to compete in a deregulated scenario. Members cannot be 'cajoled' into accepting government plans to deregulate. The industry associations, quite naturally, argue that tax relief and related financial incentives would help, also they admit that real help to communities really will lead to economic growth and ultimately to new demand. The combination of the two – tax concessions as a reward for contribution to BEE is an obvious and persuasive idea that should realign some traditional thinking. But it was interesting that the regulators observed that no programme is in place to measure contribution to BEE and rewards for companies – this is a necessary pre-requisite. Government should ensure that a business environment conducive to the realisation of transformation exists, even if it is always subject to global factors outside local control such as the oil price, Organisation of petroleum Exporting Countries (OPEC) quotas and similar issues.

Progressive thinkers are convinced that there is a need to re-invent the relationship between corporates such as the petroleum retailers and the challenges of transformation, in line with systems and processes that are needed to achieve this.

SUMMARY

This study set out to test brand management perceptions of different role players in the petroleum retailing industry and in particular attitudes to a brand's contribution to BEE and government effort to transform the industry.

Summary of findings

Table 1 summarises what has been found, in the case of each of the role players or stakeholder groups that were involved in the study.

The way forward

The South African Parliamentary portfolio committee on Mineral and Energy Affairs maintains that the contribution made by companies cannot be assessed because there is no program in place to coordinate and determine their benefit to transformation (Nkosi, 2001). Further work is therefore required to set up such a programme, with an assessment mechanism and then to use it to establish which companies have actually made real contribution to black economic empowerment. To have a "win-win" situation, cooperation and support between government and petroleum retailers is needed for successful transfor-mation, as government effort alone may not achieve desired object.

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