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The Underdog Effect: the Marketing of Disadvantage Through Brand Biography

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We introduce the concept of an underdog brand biography (UBB) to describe an emerging trend in branding in which firms author a historical account of their humble origins, lack of resources, and determined struggle against the odds. We identify two essential dimensions of an underdog biography: external disadvantage, and passion and determination. We demonstrate that a UBB can increase purchase intentions, real choice, and brand loyalty. We argue that UBBs are effective because consumers react positively when they see the underdog aspects of their own lives being reflected in branded products. Five studies demonstrate that the UBB effect is driven by identity mechanisms: we show that the effect is a) mediated by consumers' identification with the brand, b) stronger for consumers who strongly self-identify as underdogs, c) stronger in purchase contexts that are symbolic of identity, and d) stronger for cultures in which underdog narratives are part of the national identity.

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EXTENDED ABSTRACT

“We started Nantucket Nectars with only a blender and a dream...” (Nantucket Nectars label)

“Thanks to a never ending campaign by Apple’s powerful public relations machine to protect the myths surrounding the company’s origin, almost everyone believes Apple was started in a garage...actually the operation began in a bedroom... when the bedroom became too crowded operations did indeed move to the garage.” (Linzmayr 1991:1)

“I was never the likeliest candidate for this office. We didn’t start with much money or many endorsements. Our campaign was not hatched in the halls of Washington—it began in the backyards of Des Moines and the living rooms of Concord and the front porches of Charleston.” (President-Elect Obama’s acceptance speech, Nov. 5, 2008)

Despite Americans’ infatuation with winners, stories about underdogs are pervasive in sports, politics, religion, literature, and film. Both candidates in the 2008 United States presidential election, Barack Obama and John McCain, positioned themselves as underdogs to gain the support of voters, as did presidential primary candidates Hillary Clinton, John Edwards, Mike Huckabee, and Ron Paul. Underdog author J.K. Rowling, a welfare mother who wrote seven of the best-selling books of all time, created a lovable underdog character, Harry Potter, an inexperienced but passionate orphan who grew up in a closet. Television coverage of the 2008 Olympics highlighted underdog aspects of many athletes’ biographies, from swimmer Michael Phelps’s single mother to gymnast Shawn Johnson’s parents taking out a second mortgage on their home to pay for her gymnastics lessons.

In this research we examine how marketers can use underdog narratives to positively affect consumers’ perceptions of brands. Underdog narratives are often delivered to consumers through the rhetorical device of a brand biography, an unfolding story that chronicles the brand’s origins, life experiences, and evolution over time in a selectively told narrative. Many contemporary brand biographies contain underdog narratives which highlight the company’s humble beginnings, hopes and dreams, and noble struggles against adversaries. Nantucket Nectar’s label informs us that they started “with only a blender and a dream,” while brands such as Google, Clif Bar, and Apple profile the humble garages in which they started.

We argue that underdog brand biographies are effective because consumers can relate these stories to their own lives. We demonstrate that the positive effect of underdog brand biographies is driven by identity mechanisms. Specifically, we show that the underdog effect is a) mediated by a consumer’s identification with the brand, b) greater for consumers who strongly self-identify as underdogs, c) stronger in purchase contexts that are symbolic of identity, and d) stronger in consumers who are from cultures in which underdog narratives are part of the national identity. These findings suggest that the underdog brand biography is powerful, not only because it invokes a sympathetic response or because it triggers attributions of effort or quality, but because it appeals to

consumers’ identity needs. Consumers react positively when they see the underdog aspects of their own lives reflected in branded products.

This article is organized as follows. First, we introduce the concept of an underdog brand biography and explore the emergence and dissemination of underdog narratives in culture. Next, we present a series of hypotheses which examine and explain positive consumer response to underdog brand biographies. Since underdog narratives are an under-explored topic in consumer research, we then use factor analysis to develop an underdog scale that reveals two main dimensions of an underdog: 1. external disadvantage, and 2. passion and determination. Next, five studies examine the effect of using an underdog brand biography on purchase intentions, real choice, and brand loyalty, and demonstrate that identity mechanisms both mediate and moderate this process. These studies measure and prime consumers’ identities as underdogs, and manipulate the identity value of the purchase situation. We also explore how external disadvantage and passion and determination work together by comparing the effectiveness of the underdog biography to three related brand biographies. Finally, we explore the boundary conditions of the underdog effect by manipulating whether the underdog wins, loses, or is in a situation where the outcome remains uncertain. We also explore the cross-cultural boundaries of the underdog effect by testing it in two distinct cultures: American, in which underdog narratives are part of the fabric of the national identity, and Asian, in which they are not. The discussion section provides a more complete and nuanced conceptualization of an underdog brand biography based on our studies. We conclude with a discussion of the theoretical implications of underdog brand biographies and offer insight into implications for brand management.

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