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BUILDING THE BRAND EQUITY OF PROFESSIONAL SPORTS TEAMS

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Building the brand equity of professional sports teams

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Abstract: A sports team can become a brand of its own. And in an effort to capitalize on the emotional relationship they share with their fans, professional sports teams are starting to position themselves as brands. In this paper, we propose a framework for helping sports teams build their brand equity, taking into account catalyst and constraining factors, as well as “moderating” variables.

Key words: brand, brand equity, professional sports, strategy.

Autobiographical note:

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Prior to his academic career, André Richelieu worked in the business industry, spending, among others, over two years in Romania.

A new brand world for sports teams

Manchester United, Real Madrid, the New York Yankees, the Dallas Cowboys and the Chicago Bulls. These professional sports teams, among others, have established themselves throughout the years as a reference in their respective sports, going beyond local recognition to gaining, in some instances, worldwide popularity. In fact, we could argue that these teams can no longer be considered as mere sports teams; they are also brands in their own right (Bobby, 2002; Shannon, 1999).

In this regard, the purpose of our research is to study how a professional sports team can position itself as a brand and leverage its brand equity. But why should a professional sports team try to become a brand in the first place?

In this paper, which is the result of our investigations of professional sports teams in Europe and in North America, we shall try to identify the main factors a sports team can exploit in order to become a brand and reinforce its brand image in the eyes of fans. These factors shall be referred to as *catalyst factors*. Furthermore, we shall identify the main obstacles encountered in the establishment of a team as a brand. These shall be called *constraining factors*. Also, “moderating” variables will be presented. But more important, we shall propose a framework for building the brand equity of a sports team. In other words, we will introduce the process through which a sports team can build and leverage its brand.

The conceptualization of how a team can develop its brand could have both theoretical and practical applications. First, theoretical studies on the topic are still relatively limited (Desbordes, 2000). Second, professional teams are in need of some guidelines in the context of sports merging with the entertainment and communications industries (*Sport Business Group*, 2002a). Third, “brand” is now part of the vocabulary and strategic mindset of sports teams’ managers, at least of the most visionary ones, as we shall see. Truly, teams have had the potential to become brands heretofore, but it is only recently that sports teams seem to have started to capitalize on the opportunity.

With this idea in mind, we will start by introducing the notion of brand. Second, we will answer the question of why a sports team can become a brand. Third, we will present how a sports team can become a brand and which variables can help or hinder the development of brand equity by professional sports teams. We will end our presentation with a recap of the key points. The paper will follow the structure of a hockey game.

The pre-game show: What is a brand?

A brand is “a name, a word, a sign, a symbol, a drawing, or a combination of these, which aims at identifying the goods and services of a company and differentiates them from the competitors” (Kotler, Filiatrault & Turner, 2000, p. 478). Truly, a brand has both marketing and accounting value for a company; but here, we will specifically focus on the former.

A brand is a differentiating asset for a company (Kapferer, 2001). Through its brand, a firm creates and manages customers’ expectations. As such, brand image and brand quality are intertwined and instrumental in developing a successful brand (Cateora & Graham, 2001). Successful brands are able to quickly establish a strong emotional and personal relationship with the customer; and thus, potentially trigger trust and loyalty toward the brand (De Chernatony, 2001) (Figure 1). For this reason, companies that own strong brands are trying to focus the customer’s attention on their brand image.

-- Insert Figure 1 about here --

As Bedbury & Fenichell (2002) underline it, a company needs to have a brand that evokes trust from the customers and will inspire, rather than just inform through advertising and marketing. The brand should create an environment that supports the fulfillment of customer expectations, in the message and in the product (Haynes, Lackman & Guskey, 1999). A brand is a promise a company makes to its customers, and this promise is built on the coherence and continuity of the brand’s products (Kapferer, 2001). For instance, no matter where I drink a Coca-Cola, it should have the

same great taste (coherence). Furthermore, the Coca-Cola that I drink today is as good as the one I had yesterday and as good as the one I will drink tomorrow (continuity).

According to Fanning (1999), there would be two golden rules of successful brands:

i) continuous innovation; and ii) telling the story of a company's brands. Continuous innovation is done in order to take into account the taste of customers, and also to stay ahead of the competition by anticipating change. Telling the story of a company's brands means underlying the core values of the brands and adapting them according to changes in public taste. Well-managed brands are continually telling stories about themselves. Combining branding and innovation can help boost a brand, like Apple did with the introduction of the iMac desktop computer. This initiative helped revive the Apple brand and sell six million of the desktop computers in four years (Mazur, 2002).

Some authors have developed the notion of "concept brands", which offer visions, attitudes, convictions, motivations, and not necessarily intrinsic quality or improvements (Rijkenberg, 2002). Rather than defining a market segment and then trying to satisfy the particular needs of that segment, concept brands arise from emerging social and cultural trends. Richard Branson, the founder of Virgin, likes to say that what he sells is "a way of life", in order to justify the array of activities his company is involved with (Rijkenberg, 2002; Travis & Branson, 2000).

The official face-off: Why my team is a brand?

Companies have been using branding to develop a strong and enduring relationship with customers since the pre-industrial age (Kotler, Filiatrault & Turner, 2000). A relatively recent trend has seen the emergence of brand strategy as a tool for professional sports teams, so that they could nurture the relationship they have with their fans and leverage their brand asset (Cavanagh, 2001; King, 1999; Passikoff, 2000; *Sport Business Group*, 2002a).

In fact, with the exception of movie stars and actors, teams generate an emotional response from their fans, one that is stronger than in any other industry (*Future Brand*, 2002). Unfortunately, this potential emotional attachment is still underexploited by sports

teams. It is only since the mid-1990s that sports teams have started working on leveraging their brand equity, and still relatively few teams seem proactive in this regard. As an executive from Manchester United stated:

Everything is in the brand. [...] We must think in terms of products in order to develop the company. The brand is the team, its logo, the red shirt, the players, the story; it is everything related to Manchester United. It is a precious asset in developing the business (*France 2 Télévision, 2002*).

As a matter of fact, becoming a brand can enable a sports team to position itself against other teams and entertainment offers in the market (Figure 2). This is becoming increasingly important, because sports teams are battling for the entertainment money of customers against other leisure alternatives, such as festivals, movies, restaurants, camping, traveling, etc. So why should the customers spend their time and money on a sports team?

This brings us to the next point: beyond the value the team represents to the customers, a strong brand can help the team capitalize on the emotional attachment with the fans, in order to instil trust and trigger fan loyalty. In return, this trust and loyalty can help the sports team generate additional revenues through the sale of a variety of goods and services, within and beyond the sports arena (Gustafson, 2001) (Figure 2). Indeed strong brands in sports are able to make the customers live the brand at different moments of their daily life: they live their sports team and the respective brand, just like customers who wear Levi's and not another brand of jeans, and others who drink Coca-Cola and not Pepsi (or vice versa)

-- Insert Figure 2 about here --

For instance, the Glasgow Celtic soccer club (2003) initially started with traditional products, such as replicas, training kits and gifts. It has now gone into fashion wear, even branded pies and sausages. The Celtic has three stores in Ireland and makes more money from merchandise than from TV rights and sponsorship combined (Worsley, 2001).

Another example of building brand equity through brand extension is the Girondins de Bordeaux soccer team in France. The Girondins de Bordeaux (2003) soccer team has five different brands: the game brand (Adidas Collection), a sportswear brand sold in superstores (Club Collection), a leisure brand (Girondins Sport Collection), an upscale brand (Scapulaire Collection) and a brand that has products associated with their Brazilian star, Pauleta (Pauleta Collection).

Battling along the boards: How my team can become a brand?

In Figure 3, we propose a framework for building the brand equity of professional sports teams. This framework is a result of our investigations of professional sports teams, based on a review of the literature and interviews with sports managers in Europe and in North America¹, to see how these teams are working to build their brand equity. There are three steps that lead to brand equity: i) Defining the identity of the sports team; ii) Positioning the sports team in the market; and iii) Developing a brand strategy. We shall elaborate on each of these components.

-- Insert Figure 3 about here --

Defining the identity of the sports team

There are two main elements included in the identity of the sports team: the attributes of the team and the value the team represents to its fans.

First, the attributes refer to the values of the team and what the team stands for. In other words, what does the team want to be associated with and recognized for: simplicity, reliability, ambition, innovation, modernity, conviviality, solidarity, fighting spirit, etc.? These values give a strong meaning to the team, while providing a direction to the

¹ Montréal Alouettes, Ottawa Senators, Toronto Maple Leafs, Vancouver Canucks; Girondins de Bordeaux, Lille Olympique Sporting Club, Olympique de Marseille, RC Lens. We deliberately didn't want to limit the examples given in this paper to these teams.

brand. The values of a team are the starting point in defining a long-term brand strategy for the sports team (Kashani, 1995).

In this regard, the history of a team and its presence in the community can be an asset. Top sports brands have been located in their respective cities for an extended period of time, which helps establish the brand over time (*Future Brand*, 2002). As a result, the team becomes part of the social, economic and cultural landscape of the city, even the region it is in: Juventus of Turin, Newcastle United, the Toronto Maple Leafs and the Boston Celtic are examples. Thus, the team is able to trigger emotional value and psychological proximity with its fans (Kapferer, 2001). We mentioned earlier that telling the story helps emphasize the values of a company in the eyes of the customers (Mazur, 2002). This applies also to professional sports teams.

Second, once the values of the team are defined, it is important to see what they mean to the fans. Indeed, the values of the team must be translated into a clear message, one that underlines the benefits of the brand for the customers, in order to trigger the buying decision. This is referred to as the *value proposition* (Kashani, 1995) or *value creation*. The benefits can be tangible, as in a cell phone, for instance, which is compact, portable, reliable, and provides autonomy, offers e-mail and other applications at a reasonable cost. But in the case of a sports team, the benefits are mostly intangible or emotional. And because the benefits are emotional, it is even more important to nurture the flame by replenishing the “emotional bank account”. This will help maintain the sense of belonging of the fans to the team, as well as the trust and loyalty of the fans toward the brand. You do exactly the opposite with repeated fire sales and mismanagement, which affect the trust of the fans and dilute the brand.

Moreover, without compatibility between the vision of the managers and the perception of the fans in relation to the values of the team and the value proposition, there is an incoherence that hinders any further development of the brand by the team (Figure 3). Thus, it is important for teams to ensure that what they believe they stand for is understood in the same way by their fans. That is why teams that we interviewed tend to do surveys at the end of the season, but also throughout the season in order to measure the image of the team in their community.

Positioning the sports team

The positioning of the sports team relates to two elements: the selection of market segment(s) and the differentiation of the brand on the market.

First, defining the market segment(s) means that the sports team will identify the customers that are supposedly the most sensitive to the value proposition of the team. These customers represent the target market for the future development of the brand (Kashani, 1995). In the case of a sports team, these potential customers include:

- i) The fans that go see the games and follow the team's performance very closely;
- ii) Those (die hard) customers who take their passion of the team beyond the playing field and are willing to buy Manchester United ketchup (Bobby, 2002) or Toronto Maple Leafs (2003) B-B-Q sauce, take a driving lesson with Olympique Lyonnais Conduite (*Le Monde*, 2002) or drink the Racing Club de Lens milk (*L'Équipe*, 2000);
- iii) Those who relate to the team outside of the sports arena because the team's brand has been represented by a popular singer or actor. A case in point are the New York Yankees, whose variety of colourful hats and models have been promoted following a concert given by a rap singer who wore a red Yankees cap that night. Now, New Era, the official supplier of Major League Baseball's game caps, produces New York Yankees hats in an array of colours in order to fulfill the demand of young consumers who relate to the rap singers as much as they do with the team. And in fact, Yankees hats can be found worldwide;
- iv) Those who follow the team from a distance and are willing to show their association with the team in a more subtle way. That's why some sports teams, especially in Europe, have introduced lines of casual and everyday products, from jean shirts to dress shirts and ties, where the logo of the team is visible but elegant. We made reference to the Girondins de Bordeaux (2003) and the Glasgow Celtic (2003) earlier, but the Real Madrid (2003), and

both Major League Baseball (2003) and National Hockey League (2003) clubs are also good examples.

Second, the differentiation of the brand on the market means that the sports team tries to underline how its brand is unique and why the customers should buy it, instead of another brand, either from a rival sports team or from a company outside of the sports arena. If the team is able to show and sell the uniqueness of its brand, it can provide the team with a powerful position on the market. Strong brands are indeed able to generate trust and loyalty from their customers and reinforce the emotional and personal relationship with their fans (De Chernatony, 2001; Kapferer, 2001) (see Figure 1). Hence, these customers are less willing to be tempted to buy another brand.

We should mention that both the identity and the positioning of the sports team contribute to the strategic construction of the brand, which provides the foundations for the brand strategy of the team (Kashani, 1995) (Figure 3).

A case in point is the French soccer team, Lille Olympique Sporting Club (LOSC). Following a market research, the team identified four key values the fans wanted the club to promote: fighting spirit, solidarity, conviviality and modernity, which are displayed on the LOSC website (2003) (Figure 4). Both the fighting spirit and solidarity are considered to be acquired by the team, and refer to the playing field. Indeed, LOSC is looking for players who are hard-workers (fighting spirit) and team players (solidarity). The LOSC management deliberately refuses to hire good players that are known for not espousing these two values.

Moreover, conviviality refers to the interaction between the team and its fans, and the involvement of the players in their community. The management believes it has some work to do in this regard, even though some initiatives have already been launched. For example, LOSC sponsors youth soccer teams in the Lille region, which play with a LOSC badge on their jersey. This can potentially trigger the sense of belonging to the team among young customers who can become LOSC fans, if they are not already, and remain fans for years to come.

Finally, modernity relates to the construction of a new soccer stadium in downtown Lille. In fact, the team plays in an old and relatively small stadium (Grimonprez-Jooris, 23,000 seats). According to the research performed by the team, the fans expressed the wish of having a facility that will better reflect the image and the ambition of a modern French soccer team (LOSC, 2003). But it takes both the new stadium and the right management to build or strengthen the team's brand equity (Todd, 2003).

-- Insert Figure 4 about here --

Developing a brand strategy

Once the identity and the positioning are clearly determined, the sports team can move forward with its brand strategy, working on catalyst factors, while dealing with constraints and "moderating" variables (Figure 3 and Table 1). We intend to highlight some key variables that can help a team build and reinforce its brand equity and some that can prevent it from doing so.

-- Insert Table 1 about here --

Internal catalyst factors. We define catalyst factors as variables that can help a professional sports team leverage its brand. Catalyst factors can be seen as a set of tools a team might use in order to establish itself as a brand and reinforce its brand image. Internal factors are usually under the control of the sports team, or belong to the latter. We will focus on two categories of internal catalysts: "fans bonding with the team" and marketing actions.

"Fans bonding with the team": Inspired by the work of Underwood, Bond and Baer (2001), this category emphasizes on the experience the sports team provides to its fans. We structured this category around three variables: i) the entertainment experience, ii) the team's involvement in its community, and iii) the physical facilities of the sports team.

- Entertainment experience for the fans: Sharing the experience with other fans helps stimulate, increase and nurture the sense of belonging of the fans to the

team, and contributes to leveraging the sports team's brand (Underwood, Bond & Baer, 2001). A team can improve the group experience and leverage its brand by exploiting its entertainment appeal, such as at the Stade Vélodrome in Marseille. Going to a game becomes a unique experience, an event you enjoy yourself and with other fans, whose experience can influence your own experience (Desbordes, 2000). As the Vice president marketing of the Montréal Alouettes football club said: "We create and sell emotions to the fans".

For example, rituals enhance the ambience of a game and help promote the game as an event. The more attractive the ritual, the more it can potentially enhance the brand. Examples include the Anaheim Angels' (2003) Rally Monkey and the slogans fans from rival teams exchange in the bleachers at European soccer matches. In this instance, fans are both consumers and actors; being part of the event is a "must" from the standpoint of social actualization of the fans (Keyes, 1998).

The concept of entertainment could even take the form of alternate competitions, such as the *Premier 1 GP* (2003), where competing cars represent European soccer teams (Anderlecht, Benfica, Chelsea, Feyenoord, Leeds, Olympique Lyonnais and Valencia). Such an initiative could help a team capitalize on synergies that exist between soccer and auto racing, soccer fans generally being auto-racing fans as well.

- The team's involvement in its community: When players participate in sports clinics, visit hospitals, sign autographs in a shopping mall and tour the region in the team's caravan, they show some willingness to be part of the community. This increases the sympathy fans have for the players of their team, which can reinforce the identification of the fans to the team, their sense of belonging, and help the team go beyond its sports club status. To a certain extent, the sports team becomes a brand with a kind of social conscience:

At a cost of more than \$100,000 per season, Théodore [Montréal Canadiens' goaltender] rented a loge for three years [...], then donated its use to the Montréal Canadiens Children's Foundation. Every home game, four or five

children are entertained here, treated to hockey and refreshments and delightfully spoiled with souvenirs to celebrate their night (Stubbs, 2003, p. C1).

- Physical facilities: The stadium can become a mythical place over time, which creates a special ambience and helps trigger a unique attachment of the fans to the team. Wrigley Field in Chicago and Fenway Park in Boston are good examples (Clancy & Kelly, 2001). But a new stadium can also be associated with modernity and a refreshment of the brand, as the example of LOSC shows (Figure 4).

Furthermore, a team can improve the group experience and leverage its brand by exploiting its entertainment appeal. For example, the Dallas Cowboys football team owns a golf course and has turned their stadium into a theme park. This shows the fans what the Dallas Cowboys product is all about: entertainment (King, 1999).

Marketing actions. This category encompasses six variables a team can trigger in order to leverage its brand: i) on-field jerseys, ii) sale of team's merchandise, iii) players' management, iv) promotional campaigns, v) commercial partnerships and vi) customer relationship marketing programs (CRM).

- On-field jerseys: The attractiveness of the logos and colours worn by players are worth considering, as well as the brand of the jersey (Adidas, Nike, Puma, Umbro, etc.). Truly, the playing jersey or uniform is the most exposed product of the team. It is the team's trademark, and an excellent way to catch the attention of potential customers and leverage the team's brand beyond the hardcore fans. This is why more teams are redesigning their team jerseys with new colours (Edmonton Oilers, Colorado Avalanche, New York Islanders) or a modernized logo (Arsenal, Toronto Blue Jays).

In some cases, nostalgia favours the sale of replicas of older uniforms, which represents a stream of revenues for teams which face mounting pressures on income (Cavanagh, 2001), but also for companies such as Mitchell & Ness (*Major League Baseball*, 2003) or Toffs (2003). Furthermore, in 2003-2004, the National Hockey League (NHL) teams will wear white jerseys on the road and

dark jerseys at home, as it used to be until the 1960s, in order to increase the sale of white jerseys around the league.

- Sale of team's merchandise: Teams try to leverage the emotional attachment to their brand through licensing and merchandising, among others (*Future Brand*, 2002). A rationale for the licensor to license a product "is linked to brand extension and the enhancement of brand image and goodwill at a consumer level [almost] without having to develop, produce, or market a new product" (*Sport Business Group*, 2002a, p. 10). The success of merchandising can even be increased when pop stars or actors wear team gear, or when it is inserted in a movie (Heim, 2000).

Merchandise sales in Canada and the United States accounted for \$3 billion in 2001. They represent 18% of the global sales for sports licensed products (*Sport Business Group*, 2002a). And the potential is high in North America and in the rest of the World, especially among teenagers who are avid consumers of licensed products (Parmar, 2002), but also among women. Said the Vice president marketing of the Ottawa Senators hockey club: "some women are more enthusiastic than men in supporting their team".

However, merchandising goes beyond selling jerseys, caps and bobbleheads: "In several sports, licensed [video] games are now generating more revenues than traditional forms of sponsorship and are catching up with the mega sums being paid for sports broadcasting rights" (*Sport Business Group*, 2002a, p. 15).

We could say that the sale of team's merchandise has a dual role: on the one hand, it definitely helps build brand equity for the team among customers; on the other hand, as the team increases its brand equity, fans buy more licensed merchandise (Bobby, 2002; Cavanagh, 2001).

- Players' management: Acquiring a star player can have a strong popular impact, draw support and enhance the brand (Bobby, 2002). In Europe, soccer teams started pursuing Asian players prior to the 2002 World Cup, in order to promote the sport and their team in a huge and fertile Asian market. In 2000, the AS Roma soccer club signed the Japanese star Nakata, and now more teams are willing to follow suit.

The same could be said, to some extent, of local players. Having on its roster a local player that has a certain reputation and has established himself on the field can help draw fan support and generate loyalty to the team. These players are also more inclined to be recognized by the community and become involved locally. For instance, French Canadian players are very important to the Montréal Canadiens hockey team, which now can count on José Théodore as their number one goaltender. Ever since he won two prestigious trophies in 2001-2002, Théodore appears in several commercials on television and has become a central figure in the Montréal Canadiens (2003) marketing campaign. This brings us to the next variable: promotional campaigns.

- Promotional campaigns: First, advertising campaigns can potentially leverage the brand by enhancing what makes its value. In the case of the Seattle Mariners baseball team, the ads underline the efforts players put in to win, despite having lost two of their superstars two years in a row: Ken Griffey Jr. and Alex Rodriguez (Buckman, 2000).

Second, we should consider the tours professional sports teams go on when promoting the sport and their team. For instance, in the summer of 2003, FC Barcelona will meet Juventus of Turin and Manchester United during exhibition games in the United States. The tour is part of an agreement with the National Football League (NFL) in order to promote and leverage the FC Barcelona brand (*Football 365*, 2002).

- Commercial partnerships: Two examples are the agreements between Manchester United and the New York Yankees on one hand, and AS Roma and the New York Yankees on the other. Under these agreements, teams promote one another, sell products from the partner's franchise in its team stores, broadcast each other's games and share information on player fitness, health and training. Teams that share similar brand equity could benefit from reinforcing each other, especially when they are not part of the same sport (*Team talk*, 2001).

Moreover, sports teams can create "subsidiaries" abroad in order to strengthen their image and become a brand of reference in potentially lucrative markets. For instance, Ajax Amsterdam launched a new franchised soccer team in South Africa in 1999: the Ajax Cape Town (Browne, 1999). Newcastle United acquired a team called Hong Kong United, in order to compete against the commercial hegemony of Manchester United in Asia (*Sport Business Group*, 2002b).

Also, agreement with distributors should be considered. The Lille Olympique Sporting Club (LOSC, soccer) has an agreement with Auchan supermarkets, which sells LOSC merchandise across France. For the LOSC, this agreement is part of a marketing strategy in order to leverage its brand and position itself as a reference in France, and eventually in Europe (*La Voix du Nord*, 2001).

- Customer relationship marketing programs (CRM): CRM encompasses sales force automation, contact management, telemarketing, lead generation, advertising campaign management, and customer service (Waltner, 2000). First, teams collect detailed information about their fans' demographics and psychographics when fans apply for a loyalty team card or when a team conducts a standard survey. The San Francisco Giants were pioneers in this area in the nineties. Nowadays, teams from smaller (Ottawa Senators, hockey) and bigger (San Diego Padres, baseball) markets use this system.

Second, sports teams can analyze the information and better market to their customers; they get the fans out to the game and buy their products. This enables teams to offer variable ticket pricing, depending on who is playing

against the local team. The Toronto Raptors (2003) and the Vancouver Canucks (2003) have adopted this approach. Third, CRM helps sports teams generate sponsoring revenues in other areas. For example, the Nashville Predators hockey club found out that their fans' favourite participant sport is golf. This inspired the team to attract a local golf course to sponsor a direct mail initiative offering a free round of golf (Waltner, 2000). However, it should be pointed out that CRM programs can be very expensive to manage and they provide information on the current fans, not on the potential ones. This is why the Ottawa Senators are actually revisiting their loyalty program.

External catalyst factors. External factors are environmental elements or factors that are not under the immediate control of the sports team. There are three categories of external catalysts: i) market size, ii) industry changes and iii) technological advances.

Market size. We will focus on the influence the fan base and TV deals have on the ability of a team to leverage its brand.

- Access to a large fan base and lucrative TV deals: Stronger media markets generally produce stronger brands and franchises (*Future Brand*, 2002). These franchises have indeed access to a larger fan base, lucrative TV deals and higher potential income from stadium operations. Following this reasoning too closely, though, small market teams could be condemned to anonymity, which is a very deterministic view. Indeed, the Green Bay Packers football team has managed to create brand value through a unique ownership structure, a winning record and quality merchandising (*Future Brand*, 2002). And the identification to the Green Bay Packers goes beyond North America, as Packers merchandise is popular in Europe, Asia and South America.

At the same time, it is true that smaller market teams can feel cut off. But poor management seems to be more responsible for the problems encountered than market size, as the expected dissolution of the FC Malines soccer team in Belgium illustrates. Malines, now in a state of bankruptcy, was once the winner of a European Cup in the nineteen eighties (*Le Soir*, 2002).

Industry changes. Some connections are appearing among three industries: sports, entertainment and communications.

- Merger of sports with the entertainment and communications industries: An increasing number of sports teams are now owned by communications and entertainment companies (Toronto Blue Jays, Paris Saint-Germain, etc.). Although convergence has been withheld by some companies, firms still try to take advantage of new synergies in order to leverage their brand (*Sport Business Group, 2002a*). Professional sports teams offer content to those who own the pipeline (TV, Internet, radio, etc.) or add content to those who already own some content. At the same time, teams should realize that they now compete with a number of entertainment offerings to attract customers and get the latter to spend their discretionary revenue.

For professional sports teams, this merger between three industries is an opportunity to exhibit the attributes of the brand and showcase them to a larger audience. An example is the exclusive contract the Réseau des Sports (RDS) has signed with the Montréal Canadiens hockey team for the 2002-2003 season. RDS is partly owned by one of Bell Canada Enterprise's (BCE) subsidiaries, Bell Globemedia Interactive; and BCE owns the arena where the Canadiens play their home games.

Technological advances. These advances bring new means of communication, such as the Internet.

- Development of new means of communication: The development of new means of communication opens new frontiers for professional sports teams. The Internet could bring a substantial increase in advertising revenues and electronic commerce with the sale of licensed products (Desbordes, 2000). A web site can strengthen the relationship between a team and its fans, and create a larger community on a global level (*Inc., 2000*). Unfortunately, the potential of the Internet still seems underexploited. A team website does not always provide the fans with real info, focusing instead on promotional material and merchandise. As a result of this, sports teams may be losing hits and ultimately money, because if

fans do not visit the site, advertisers will have no reason to advertise there (Dunleavy, 2000). Ideally, teams should move from a site that only provides information to one that can help build a virtual community with the fans, beyond their local market. Most of the professional teams seem to be in this transition phase.

The constraining factors (constraints). Constraining factors are variables that can stop or prevent a team from leveraging its brand. Constraining factors can be seen as obstacles in a team's pursuit to establish its brand. We have identified four categories of constraints: i) fashion, ii) decline in loyalty, iii) life cycle of sports leagues and iv) the general entertainment offering.

Fashion. Customers do not always know why they buy what they buy, which can dilute the brand in the long run.

- Trend phenomenon: Though it can appear to be positive at the beginning, a fashion trend is very short lived (Kotler, Filiatrault & Turner, 2000). Once the trend is gone, what was once considered "cool" could become "dull", especially when the success comes too fast and the team is unable to sustain its success on the field over time. As such, sports teams can become victims of their own success and should be careful in exploiting a fashion trend among customers, especially teenagers whose loyalty is extremely volatile (Parmar, 2002). Brands can be misused and recuperated by gangs, as is the case with some American sports teams (Los Angeles, Detroit).

Decline in loyalty. Players, but also fans, are showing signs of decreasing loyalty toward sports clubs. And generally speaking, there is a decline in customer loyalty toward brands.

- Decrease in customer loyalty toward brands: Customers seem to have less and less loyalty toward brands, moving from one product to the other very quickly and very often (Kotler, Filiatrault & Turner, 2000). At the same time, if a brand is not clearly established, people will buy it for the price or not at all (Clancy & Kelly, 2001). In the world of professional sports, fans seem to start taking their distance

from both management and players (Burton & Howard, 1999), as fans grow tired of greedy battles between team owners and players' unions (Daley, 2003). This will become a challenge for professional teams, which try to build their brand and leverage it by exploiting the emotional attachment of fans, at a time when the emotional attachment of fans seems to be eroding.

- Less and less loyalty from the players toward their team: Players are becoming less and less loyal to a team, because of the free agent phenomenon and skyrocketing salaries, but also because team owners freely trade players. The latter phenomenon is often expressed before the trading deadline when teams are making a late roster move for the post-season. It becomes difficult for the fans to associate with players that can be traded at any time, or develop a committed relationship with a team that does not even keep its nucleus of players from one year to another. Less attachment means less loyalty, which in turn makes it more challenging for teams to leverage their brand (see Figure 1 and Figure 2). Fans want authentic players and authentic brands (Davis, 2002, p. 21): "credibility, integrity and honesty sell just as well as -- if not better than -- celebrity endorsements". That is a reason why professional sports teams try to get closer to their fans: through community involvement by the players as we mentioned earlier, but also, in some instances, by giving nicknames to their players (*Vancouver Canucks*, 2003).

Life cycle of sports leagues. We refer here to the maturity or decline phase of sports leagues.

- Maturity or decline phase of professional sports leagues: This is especially true in North America, and transpires in the attendance and TV ratings steady decrease over the last few years: since the 1994 strike, the attendance at Major League Baseball games has dropped steadily. In 2002 alone, the decrease was 6.3% (Godin, 2003). But in several European countries, TV rights have dropped significantly as well in 2002, reducing the expected revenues of the teams and forcing the latter to get rid of pricey veterans, such as in the German Bundesliga. That's why professional sports leagues aim at increasing their visibility and

expanding overseas. Major League Baseball, for one, had regular games scheduled in Japan, in March 2003, and plans to play some games in Europe, in 2004. And the NBA is now drafting Asian players, which increases the notoriety of the league as a whole and of some teams in the region.

General entertainment offering. As underlined earlier, a sports team must sometimes fight hard for the entertainment money of the customers.

- Competition from other entertainment alternatives: Because sports teams compete against other entertainment offers in a respective city, fans could be turned away by a lack of victories and chronic mismanagement. In such an environment, a sports team needs to position itself on the market and highlight the value it brings to the customers (see Figure 3). Otherwise, people will spend their entertainment dollars on activities that do not involve professional sports teams. This holds especially true in cities where customers have the choice among a wide variety of entertainment options (arts, sports, restaurants, etc.). Professional sports teams cannot take for granted the emotional attachment of the fans; it needs to be nurtured in time. As the Vice president marketing of the Montréal Alouettes football team said: “You cannot betray the emotion of your fans. Otherwise, you alienate them, they go somewhere else, and they may never come back”.

“Moderating” variables. Finally, we have identified three categories of “moderating” variables, aside from the other variables. They can help a team build and reinforce its brand equity, as much as they can hurt the team’s brand equity or restrain its expansion: legal framework, finances and on-field performance of the sports team. We refer to them as “moderating” variables because of i) the relative lack of control teams have on these variables and ii) the impact on brand equity that is both generally difficult to assess for sports teams and ambivalent.

Legal framework. We shall look at the mode of operation of the league and at the legal status of the team within the league.

- Centralization in managing the league's brands: For most North American professional sports teams, the league governing body oversees the marketing and protection of individual trademarks and products. Each officially licensed product bears the logo of the league, as a seal of approval.

One of the benefits of a centralized approach to licensing and merchandising is the preservation of the quality and uniformity of official merchandise around the world. This applies to the introduction of new jerseys: for instance, the Ottawa Senators' (2003) third jersey was approved by the league and before the beginning of the season, the team knows during which games the jersey will be worn.

Moreover, with this centralized approach, the revenues from merchandising are shared among the teams, which helps smaller market teams. This centralization provides homogeneity and strengthens the overall quality of the league in itself (Mullin, Hardy & Sutton, 2000).

However, centralization in managing the league's brand handcuffs teams in their initiatives. For example, in the National Hockey League (NHL), teams can exploit their brand within a 75 mile radius of their local market. Outside of this area, the NHL controls the marketing initiatives and teams must associate with companies that are authorised NHL sponsors for any promotional campaign. As the Vice president marketing of the Ottawa Senators hockey club told us: "The NHL does not see the specificities of the markets. As a result, teams are not able to leverage the brand as they could. We believe we would benefit more if we had more control over merchandising, for instance. The Senators could build more loyalty and leverage the brand better".

For the Vice president marketing of the Toronto Maple Leafs hockey club, "the geographical limits imposed on us by the league are a constraint. The same applies to the equal sharing of revenues among the 30 teams. Toronto could become the Real Madrid of hockey but not the way the NHL operates now".

In Europe, trademarks are held and marketed by individual teams, and no single body oversees trademark portfolios. Consequently, if this gives more room to manoeuvre for sports teams, there is a risk of inconsistencies in registration and enforcement of the teams' brands (*Sport Business Group*, 2002a).

- Legal status of the team: In North America, professional sports teams are franchises. In other words, business people acquire the right to exploit a team and its brand from the league, but the team remains the property of the league. The advantage of this system is a more coherent image of the league and of the teams' brands (Tourret, 1992/1993). At the same time, franchises can be contracted or moved to another city for business purposes, which can alienate fans and threaten the integrity of both the sport and the league. The balance between business and ethics is sometimes difficult to find within this system.

In Europe, professional sports teams are increasingly being managed as companies, as showcased in England. In France, to better compete with teams from major European championships (England, Germany, Italy and Spain), first division soccer teams are putting more pressure on the league to change the legal framework in relation with television rights, stadium lease, financing of the team, etc, which should give them more flexibility to leverage their brand equity (*Le Monde*, 2002).

Finances. The financial state of a team is important in enabling a club develop its brand equity. However, it is not enough.

- Resources of the team: Resources, especially financial ones, can tremendously help a team in establishing its brand: the New York Yankees are probably the most convincing example in North America, whereas Real Madrid is a good case in point in Europe. At the same time, the Oakland Athletics baseball club show that it is also how you spend your money that matters (*Future Brand*, 2002). And what about the Racing Club Lens soccer team, which has managed to preserve its well-known family spirit in a city of 300,000 people, while taking into account the demands of modern soccer? Its budget is the equivalent of US\$50 million, and 10% comes from the sale of licensed merchandise. The team also sells its

milk in a region where the attachment to the region and to the soccer team runs deep in the heart of the fans (*L'Équipe*, 2000).

On-field performance. This category has different facets. It encompasses both winning and a winning tradition.

- Winning: People like to associate themselves with winners. A team that is competitive can help leverage its brand, especially in the case of teams that are younger or those that do not yet have a Stanley Cup or a World Series under the belt. They need to build a fan base and loyalty to the team: “The best sales tool any team has is a winning record. [...] But teams can’t always be winners” (Waltner, 2000, p. 113).

But there is more to it than winning: the style of play or the fight for survival of the team can trigger an attachment toward the club and its brand. The team becomes the underdog the fans like to follow. In 2002, the Montréal Expos and the Minnesota Twins generated some sympathy, which went crescendo in the case of the Twins, as the team qualified for the playoffs. Minnesota Twins merchandise became strongly visible even on the website of Major League Baseball (2003), which is an irony considering the league plans to contract the team prior to the start of the 2002 season.

In fact, we could say that the ideal would be to build enough of a strong brand to protect the team from the contingencies of on-field performances, at least in the short term. As a manager of Lille Olympique Sporting Club said during our interviews: “One or two bad seasons can be forgiven, but more than that, it can alter the loyalty of the fans toward the team, harm the fan support and damage the brand image of the club. And if you relegate in Second Division, that could well be the point of no return, as fans throw the towel”.

In the same vein, if you dilute the product with repeated fire sales, the message you send to the fan is that your product is not worth being bought. If the owners do not believe in their team, it becomes very difficult to ask the fans to associate themselves with the team and develop any emotional attachment and loyalty

toward it. If there is little or no trust in a brand, the brand equity is very weak, as we showed in Figure 1.

The three stars: From a local to an international brand

By exploiting the strong emotional relationship they have with their fans, which is quasi unique to the sports industry, professional sports teams can build their brand equity in order to position themselves as brands in the market. With this idea in mind, we have developed a three stage framework, i) starting with the identity of the team, ii) then building its positioning, before iii) developing and implementing a brand strategy.

In the discussion around brand strategy, we have looked at catalyst factors a team can exploit, while managing the various constraints and the “moderating” variables it may have to deal with. A certain emphasis has been put on marketing strategies and merchandising. However, we should note that a brand strategy goes beyond selling caps, jerseys and memorabilia. Often do we see teams that start working on their brand equity focus exclusively on merchandising; this approach is very limitative, as are its potential benefits. A brand strategy includes merchandising, but is not limited to the latter.

As the managers of the Vancouver Canucks hockey club mentioned to us: “we are looking to build a community brand that appeals to customers beyond our home market”. Indeed, every solid brand is a community brand, in the sense that it binds together a pool of customers who share the values of the brand, live the brand and take possession of it. An established brand can move the fans along the emotional continuum in order to increase their loyalty to the team. It is able to expand its customer base beyond its market of origin, at a regional, national and even, in some cases, at the international level (Figure 5). A global brand can be a mass international brand, such as Coca-Cola, IBM or General Motors; they appeal to the mass market across countries. But a global brand can also be a niche brand that appeals to a very specific market segment across different countries, such as IKEA. Among international sports brands, some could be continental brands, starting to emerge as true international brands (Newcastle United), whereas others could be seen as true global brands (Real Madrid).

If not every team can become a mass international brand, such as Manchester United or the New York Yankees, every sports team has the potential for building some brand equity. Even if the resources are limited, it is possible to conceive that a sports team could follow a niche strategy to expand its brand across markets, reaching to foreign customers based on its values (identity) and a shrewd positioning. Examples exist: soccer teams in Belgium and Switzerland have started to consider this issue, taking marketing more seriously in order to become commercially viable (*The McKinsey Quarterly*, 2000), even though they may still appear to be exceptions. This may change if indeed, professional sports teams start working to build their brand equity and become brands on their own.

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Figure 1

What is a brand?

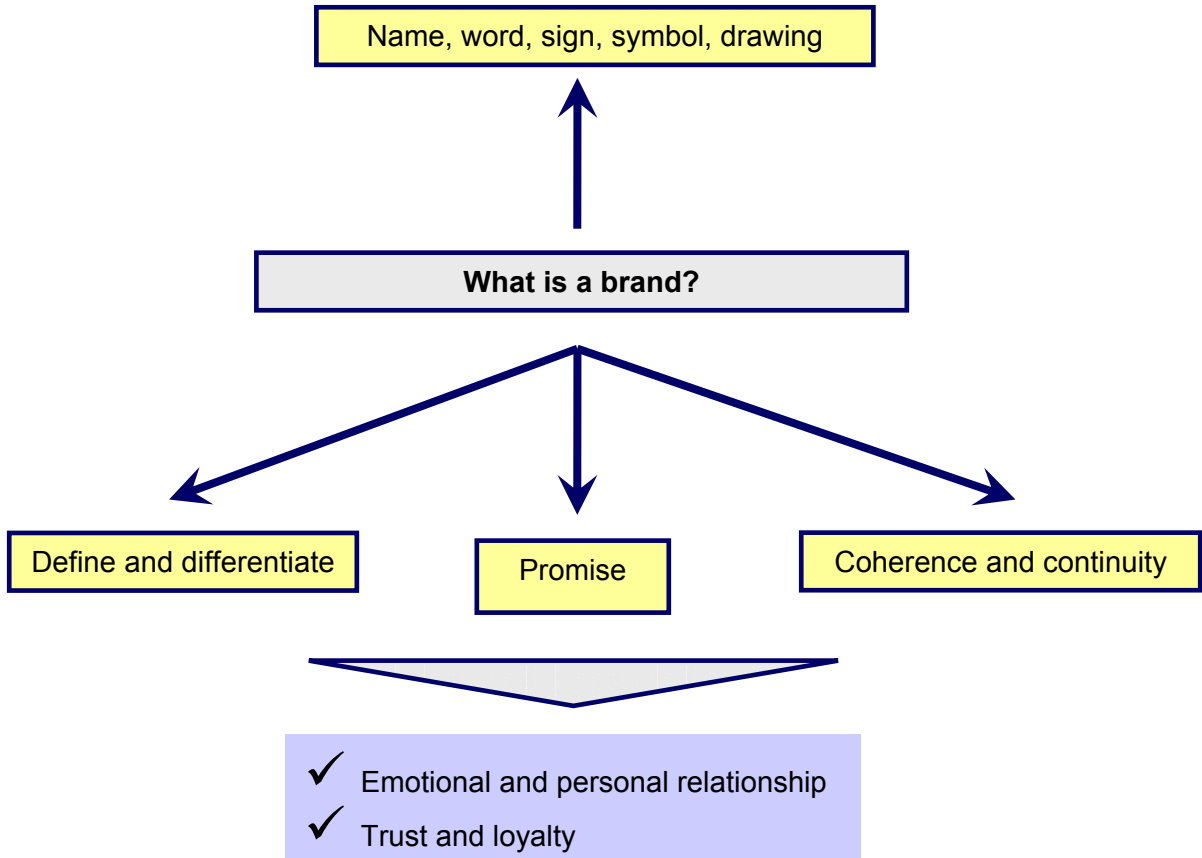


Figure 2

Why my team is a brand?

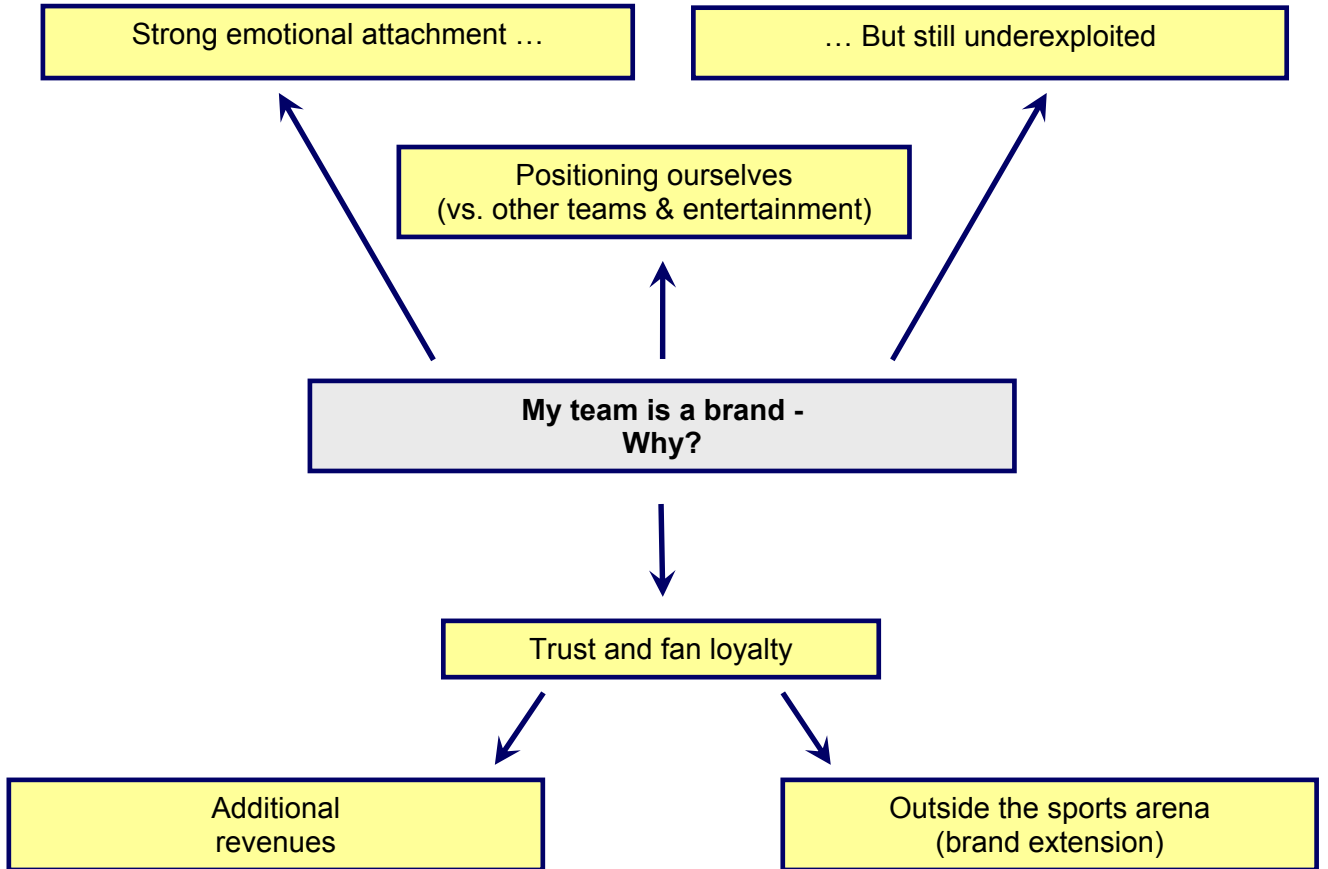


Figure 3

A framework for building sports teams' brand equity

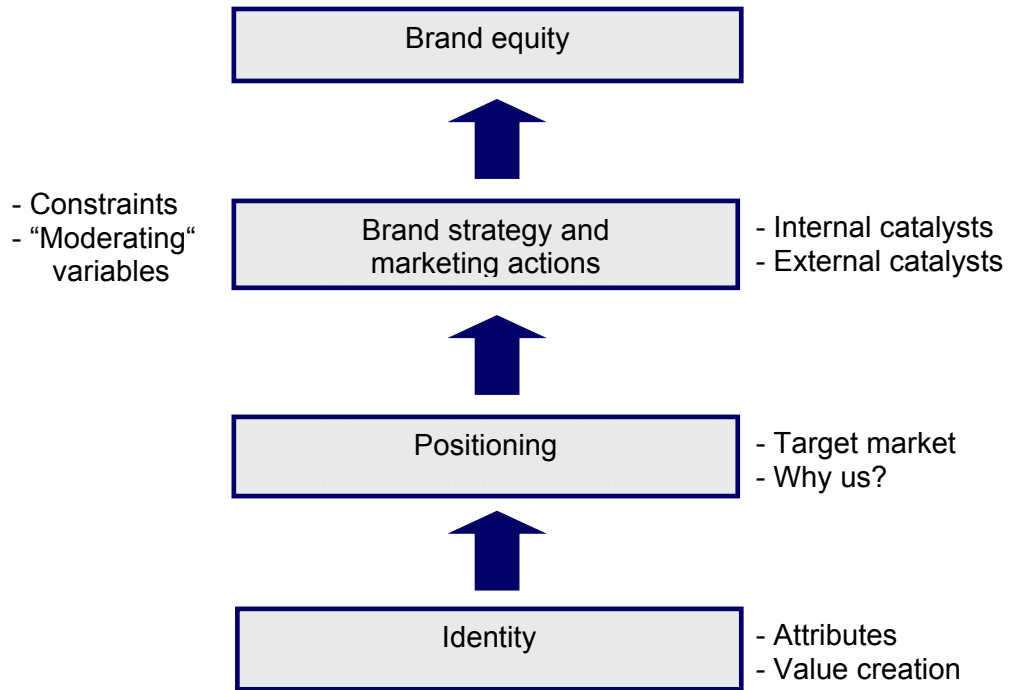


Figure 4

Strategic construction of the brand: The LOSC example



Table 1

Catalyst factors, constraints and “moderating” variables

| Catalyst factors | Constraints and “moderating” variables |
|--|--|
| <p style="text-align: center;"><u>Internal catalyst factors</u></p> <p>“Fans bonding with the team”</p> <ul style="list-style-type: none"> ▪ Entertainment experience for the fans ▪ Team’s involvement in its community ▪ Physical facilities <p>Marketing actions</p> <ul style="list-style-type: none"> ▪ On-field jerseys ▪ Sale of team’s merchandise ▪ Players’ management ▪ Promotional campaigns ▪ Commercial partnerships ▪ Customer Relationship Marketing programs (CRM) | <p style="text-align: center;"><u>Constraints</u></p> <p>Fashion</p> <ul style="list-style-type: none"> ▪ Trend phenomenon <p>Decrease in loyalty</p> <ul style="list-style-type: none"> ▪ Decrease in customer loyalty toward brands ▪ Less and less loyalty from the players toward their team <p>Life cycle of sports leagues</p> <ul style="list-style-type: none"> ▪ Maturity or decline phase of professional sports leagues <p>General entertainment offering</p> <ul style="list-style-type: none"> ▪ Competition from other entertainment alternatives |
| <p style="text-align: center;"><u>External catalyst factors</u></p> <p>Market size</p> <ul style="list-style-type: none"> ▪ Access to a large fan base and lucrative TV deals <p>Industry changes</p> <ul style="list-style-type: none"> ▪ Merger of sports with the entertainment and communications industries <p>Technological advances</p> <ul style="list-style-type: none"> ▪ Development of new means of communications | <p style="text-align: center;"><u>“Moderating” variables</u></p> <p>Legal framework</p> <ul style="list-style-type: none"> ▪ Centralization in managing the league’s brands ▪ Legal status of the team <p>Finances</p> <ul style="list-style-type: none"> ▪ Resources of the team <p>On-field performance</p> <ul style="list-style-type: none"> ▪ Winning! |

Figure 5

Developing brand equity: From a local to an international brand

