Online Product and/or Service Brand Offerings in South Africa

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Abstract

The Internet has forced most companies to consider online brand building strategies. This strategic consideration depends on the determination of the status quo of the brand at present. The former is crucial as identified success drivers of online brand initiatives are neither uniformly nor generically applicable to all online brand offerings. It is thus suggested that the applicability of success factors to online brand offerings depends on the appropriateness of the brand's context, which in turn is determined by benchmarking the brand against categorised characteristics of existing online brands. This paper summarises and categorises South African online brand offerings over a three year period and applies the findings for elucidatory purposes to a three dimensional Brandscape Model. After managerial implications have been discussed, the study concludes with recommendations for future research.

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1 Introduction

The factory system, which dominated the first quarter of the 20th century (Hanson, 2000: 18), increased the scale of production using product standardisation while simultaneously and consequently reducing production costs. Companies wisely anticipated that markets might not be able to absorb the voluminous produce of mass production without some kind of intervention from the producer. The intervention materialised in the creation of product lines out of standardised products that were sold as national brands in national markets. Aaker (1991: 7) defines a brand as "…a distinguishing name and/or symbol…" that aims to identify the goods and/or services of a single or set of merchants and consequently differentiate such goods and/or services from competitive offerings (also see Breakenridge, 2001: 14; Hanson, 2000: 127; Pride & Ferrel, 1993: 302).

This strategy of selling national brands in national markets was made possible through the development of instant awareness for new products using powerful but passive audio and visual communication media like television, radio and print media (Ries & Ries, 2000: 26-27). A brand, after its introduction, also needed to be maintained, cultivated and rejuvenated. The dimensions and quality of the aforementioned maintenance, cultivation and rejuvenation is what Aaker *et al.* (2001: 16-17) refers to as brand equity (the value added or subtracted to differentiate a brand from competitive brands) and what Braunstein and Levine (2000: 28) refer to as brand depth. As there is a direct correlation between the strength of the brand's equity or depth, and the amount of revenue it generates, most companies strive to either maintain or increase the value of their brand(s).

Technological developments such as the computer (Hanson, 2000: 19) made it easier to purchase goods, refine brand building strategies and consequently strengthen brand equity. However, individuals were neither involved, nor did they shape the commerce process. Information flowed one-way via the above mentioned communication media: from the company that promoted its product and/or service to its potential target market.

Hence, during the last decade of the 20th century, traditional communication media such as television, radio and print media, started to fragment and became saturated (Warren, 2000: 32-40), slowly losing its ability to introduce, maintain, cultivate and rejuvenate brands. The proliferation of the fragmentation and saturation of traditional communication media posed a serious threat to the strength of a company's brand equity or depth. It was during this period that the Internet was introduced to the historically passive mass-communication media arena. The technology inherent to the Internet now made interactivity, personalisation, customisation, and one-to-one marketing a reality (Strauss & Raymond, 2001: 8; Worthington-Smith, 2002: 45-47; 2003: 58).

Various authors (Winkler, 1999; Braunstein & Levine, 2000; Carpenter, 2000; Kania, 2000; Lindström & Andersen, 2000; Breakenridge, 2001; Meyers & Gerstman, 2001) wondered whether, as well as which, traditional brand building strategies remained (or should remain) consistent within the novel communication attributes introduced by the Internet. Carpenter (2000) identified eight success drivers implemented by American companies that have successfully not only introduced and built brands in both physical and virtual markets, but have used primarily the Internet to do so. The eight drivers are: Creating brand awareness and differentiation; cultivating customer commitment; forging strong distribution and content alliances; moving early and fast; developing intimate customer knowledge; cultivating a reputation for excellence; delivering outstanding value; and in respect of crossover marketers specifically: respecting core brand elements, improving the offline brand experience online, and leveraging key offline assets. On closer scrutiny, the eight success drivers proved to be the result of the companies' strategic utilisation of the inherent capabilities of the Internet to differentiate their respective brands from competitive offerings by focusing on, and executing, a new combination of the age-old and traditional elements (brand loyalty, brand name awareness, brand associations, brand quality perception, and other proprietary brand assets like channel relationships) that underlie brand equity.

The identified success drivers describe certain initiatives which a company may or may not implement in its brand building enterprises. However, the suggested success drivers assume a certain degree of one dimensional generic uniformity in respected brands. Braunstein and Levine (2000: 71-75) suggest that it is only upon the identification and definition of the specific anatomy of a brand within a three dimensional framework, that a company should begin to consider and select the appropriate success drivers. They propose that the best way to achieve the above-mentioned is to divide the specific brands into five categories (the identity; trade brand; true brand; super brand; and niche brand) and then to plot the five categories on a three dimensional model called the "Brandscape Model".

The challenge confronting South African managers with online brand offerings is to determine to which brand categorisation the online brand offering belongs (benchmarking) and once this has been established, if the categorisation is indeed appropriate (context) and which success drivers should be deployed or focused on in order to maintain or project the brand offering to the appropriate categorisation.

2 Methodology

This paper will firstly explain the different brand categorisations, using a construct devised and tested by Braunstein and Levine (2000). This construct provides a framework that can assist in benchmarking brands and determining the appropriate context of categorised brands. Forty-six South African online brand offerings will be summarised and divided (with motivation) into categories, using this construct. Secondly, the paper will plot the proportion of each brand categorisation on the Brandscape Model (Braunstein & Levine, 2000: 71-75), using a three year longitudinal overview (Figure

4: Proportional change in brand categories plotted on the Brandscape Model). Thirdly, it will link Carpenter's (2000) identified success drivers to the different brand categorisations. The list of 46 South African online brand offerings of Worthington-Smith (2001; 2002; 2003) that will be summarised and divided are supported and supplemented both in composition and content by other primary (The Goldstuck Report: Online retail in South Africa, 2002), secondary (Internet, newspapers and journals) and tertiary (EBSCO Business Source Premier and EMERALD Fulltext) literature sources as being representative of online brand offerings in South Africa.

3 Categorising South African online brand offerings

The selected South African online brand offerings can be arranged into the five brand categories as follows:

3.1 The identity

An identity is a newly registered company, product or service with a narrow product or service offering. An identity does not enjoy any of the benefits usually attached to a true or super brand (see below) such as awareness, unaided recall and preference. The identity has no brand value and meaning as neither money nor time was invested over any extended period of time to obtain it (Braunstein & Levine, 2000: 71).

Examples of South African identities possibly are: 20twenty, A-Fin-Capital, Autoworld, BestBond, BondNet, Collaborative Xchange, Digital Mall, Digiturf, eFreight, E-Mail Corporation, Fundsnet, Icanonline, Inthebag, Jobfood, Job Navigator, Kulula.com, Megashopper, Mortgage SA, Mylife, Nationwide, PSG Online, SchoolNet SA, SportsBet, Streetcar, TimberAfrica, Tradestream, Travel.co.za, and Tutuka.

20twenty (http://www.20twenty.co.za) was South Africa's first online bank doing business exclusively on the Internet. It was launched in July 2001 under the umbrella of the offline parent brand Saambou Bank, but has since been purchased by Standard Chartered Bank on the 1st of August 2003 for just less then $10 million after Saambou Bank was placed under judicial management in February 2002 and was eventually acquired by the FirstRand Group. The concept of an online-only bank developed because a perception exists that traditional banks are inefficient due to their corporate hierarchy and less cost effective because of a huge investment in physical infrastructures. A client was offered the better of two worlds: the flexibility of a new online bank and the stability of a regulated physical banking establishment (CBN Archive, 2001). The 20twenty brand is of special interest as it was the first South African bank that selected an alternative brand name for its online offering. Although a considerable amount of money was spent on creating brand awareness, 20twenty had over 40 000 customers in six months. Standard Chartered wisely decided not to change the brand, mainly due to the fact that 20twenty is a well-established brand with a loyal customer base, as well as the cost involved in the development of a new brand. The strength of the loyalty of the 20twenty customers to the brand was demonstrated when the customers established a website (www.20twentyfans.org.za) to rescue their brand, offering to deposit personal money or to pay higher fees (Ikalafeng, 2003). 20twenty indicated that they will resume operations around March 2004.

A-Fin Capital (http://www.a-fincapital.com), previously known as Grandfin, part of the AST group, was launched in August 2000 as an Internet-based corporate financing system. A-Fin Capital used the Internet to connect finance providers (banks and financial institutions) with finance seekers (individuals and small to medium businesses). The finance seeker specifies its borrowing requirements online through a standardised application; A-Fin Capital collects supporting information to substantiate the application and then evaluates it. If the application is conceivable it is forwarded in a decision-ready-format to financial institutions. The finance seeker is able to view the responses from the financial institutions, compare them, and consequently select the most appropriate offer. A single point of entry to multiple capital providers is therefore created that affords finance seekers choice, simplicity, assistance and solutions at no additional costs. Although the company processed more than 500 corporate finance applications with a book value of R1.195 billion, it no longer existed by October 2003.

Autoworld (http://www.autoworld.co.za) is an online service brand that provides assistance to motor dealers to build and maintain their own websites, while linking their website to other relevant services such as banking and finance, hire purchase facilities, vehicle specification and price comparisons. Autoworld thus functions as a metamediary – a portal where goods and services of anything automotive are researched, purchased and sold.

BestBond (http://www.bestbond.co.za) and *BondNet* (http://www.bondnet.co.za) have similar service offerings: both aim to encourage existing home-owners to look at other financial institutions over and above their present personal bank for more financially beneficial mortgage structuring. BondNet and BestBond will then liaise with other financial institutions with which they have partnerships. While BondNet only liaises with three participating banks (Origin, Absa and First National Bank), BestBond offers a wider range of eleven participating banks or divisions of banks. BestBond recently also expanded its offering to short term and life insurance. The two brands have stayed independent from estate agents, the property industry and finance providers in their initiative to realise their aim of providing an impartial referral service.

Collaborative Xchange (http://www. cxchange. co.za), a division of Super Group, is a logistical data-switching hub utilising application software that enables total visibility throughout the supply chain, thereby giving the user real-time relevant information and control over their product. An unlimited number of stakeholders with non-compatible systems can use Collaborative Xchange to track and trace the movement of goods through the supply chain.

Digital Mall (http://www.digitalmall.com) is part of the Digital Mall Group, an outsource partner aimed at facilitating multi-channel commerce, relationship marketing and customer relationship management. Digital Mall offers the online customer a single point of entry and sale for a diversity of products, ranging from flowers to electronics, by using strategic partnerships with well-known South African brands such as Reggies and Incredible Connection. Guaranteed security and fulfilment builds the online Digital Mall brand. Estimates in 2003 gave Digital Mall approximately 40 per cent of the total business-to-consumer e-commerce market in South Africa.

Digiturf (http://www.digiturf.com) is an online-only start-up company that simulates detailed physical horseracing in virtual space. Participants can either place wagers on scheduled horse races or train their own horses and enter races independently. Races are also transmitted globally. Online payment facilitation and security services are provided.

eFreight (http://www.efreight.co.za), formed in February 2000, is an online marketplace for shippers, carriers and logistics service providers in South Africa. This neutral virtual marketplace may for example be used to facilitate the processes and documentation associated with international trade logistics and transportation. It forms part of a worldwide technologically enabled logistics network of global supply chain service providers.

The E-Mail Corporation (http://www.email corp.co.za) – This online only company first entered the electronic messaging arena in February 1999 with the aim of developing and supporting leading edge e-mail applications for corporate clients. It specialised in secure electronic document delivery (SEDD), direct e-mail communication, encryption of confidential information, and a wide variety of online newsletters (Cableguy, 2002). The main revenue stream was generated by advertisements. The brand was built by making exclusive use of the Internet, but the online brand name was eventually changed to Striata (http://www.striata.com) in line with the company name of Striata Communication Solutions. Striata is now a leading provider of software solutions in electronic bill presentment and payment (EBPP) and multi-channel messaging.

Fundsnet (http://www.fundsnet.co.za) was an Old Mutual initiative launched in November 2000 that offered online unit trust trading modelled on American sites which at the time showed strong growth. Although the service supported Old Mutual advisors, it was still positioned as an independent entity or brand. However, Old Mutual decided to close Fundsnet in June 2002 (Anderson, 2002: 2) because it attracted only 205 clients worth a combined R54 million since November 2000 and thus did not make the site sustainable (Balancing act news update, 2002). Old Mutual postulated that people with spare cash prefer dealing with people (Biz-community, 2002).

Icanonline (http://www.icanonline.co.za) is a joint initiative between Nedbank and the consumer Internet company M-Web, offering full online banking and other financial services. The Nedbank retail banking division provides the financial services while M-Web provides a user base, technological expertise, and content.

Inthebag (http://www.inthebag.co.za) was the online offering of the physical retailer Woolworths and was launched in October 2000. It had 17 000 registered online shoppers, of which 5 000 were regular online shoppers. However, the company had to spend R65m by June 2001 to obtain this number of online shoppers. The customer acquisition costs amounted to a staggering R3 824 per registered shopper which contributed to the Inthebag brand being sold back into the Woolworths group in June 2001 in order to develop it as a channel extension to the physical brand and stores. The website was substantially restructured and the strategy was changed. However, the Inthebag brand has recently been bagged by the Woolworths group in favour of the uniform Woolworths brand for their online and offline offering.

The online personnel and placement agencies in South Africa have mostly penetrated the market of the white collar worker or middle manager, offering innovative online job-hunting tools, online resume builders, job alerts via e-mail, career advice, and newsletters to the job seeker, as well as resume searching facilities, job ad capturing, resume alerts, online reference checking, and job response handling to the online recruiter. However, of the four prominent online brands researched, *Jobfood* and *Job Navigator* are identities, while *Career Junction* and *Personnel Net* (or *PNet)* are niche brands. *Jobfood.com* (http://www.jobfood. co.za) is a subsidiary of Logical Options, a focused people solutions business with interests in both South Africa and North America, which also owns the Renwick Group, PAG and Kelly. *Job Navigator* (http://www.jobs.co.za) rebranded their site to Jobs.co.za in 2002.

Kulula.com (http://www.kulula.com) is a R70 million domestic air travel venture developed for the South African market by British Airways and Comair Limited. Operating costs have been reduced and relatively low airfares are offered between South Africa's major cities. Tickets are booked in real time via the Kulula.com website, which acts as an exclusive ticketing system. In 2002 the company expanded its offering to include car hire though a partnership with Imperial's black economic empowerment partner, Khaya. Kulula.com spends about 2 per cent of expenditure or around R1 million per month on advertising to increase top of the mind brand awareness (Barron, 2003). In the 2003 Markinor top brands survey Kulula.com came third after South African Airways and British Airways and is presently one of South Africa's largest online retailers with 65 per cent of transactions generated via the Internet (Ikalafeng, 2003; Sunday Times, 2003).

Megashopper (http://www.megashopper.co.za) is a division of McCarthy Online Ltd and has partnered with the Spar Group. It is an online shopping mall offering a broad product range, which *inter alia* include eBucks, airtravel, movies, and mattresses.

MortgageSA (http://www.mortgagesa.co.za) is a multiple lender mortgage application website using physical, virtual and telecommunication channels. It was founded in 1998 and developed its online offering according to traditional property retail financing. It is currently the home loan originator to over 6000 affiliated estate agents and more than 600 realtor offices throughout South Africa.

MyLife (http://www.mylife.co.za) was launched in January 2001 as a financial aggregation portal of the Liberty Group, developed at a cost of R23 million (Manson, 2003). MyLife allied with Standard Bank's Bluebean to create MyLife@Bluebean when initial results did not meet expectations (MyLife failing to sell virtually any new business). Results did not improve, and MyLife@Bluebean is currently only maintained as an online information portal by the Liberty Group.

Nationwide Airlines (http://www.nationwideair.co.za) was established in 1995 as part of the Nationwide Air Group, providing domestic scheduled airline services at the low-cost end of the South African air travel market. Nationwide partnered with the now defunct Belgian carrier, Sabena, and flew under the name Sabena Nationwide. It formed a partnership with Virgin Atlantic in 2002.

The financial website *PSG On-line* (http://www.psg.co.za) was developed by PSG Investment Services, which is 95 per cent owned by the PSG Group (founded in 1996), a listed company at the Johannesburg Securities Exchange. Full online trading is supported by a physical infrastructure (branch network and telephone broking). An alternative revenue stream is created through the sale of stock market education and software, resulting in the introduction of more potential customers to the online trading service.

SchoolNet SA (http://www.school.za) was launched in 1997 as a non-profit educational organisation that creates learning communities of educators and learners through the use of Information and Communication Technologies (ICTs). It has received core funding from the international donor sector as well as project funding from the South African corporate sector. SchoolNet SA sets up schools with ICTs, develops and trains teachers in distance learning, provides content and curriculum delivery, and creates awareness of the educational value of ICT systems and the adaptation thereof.

SportsBet (http://www.sportsbet.co.za) offers a secure online channel to an established spread-betting service focused on the South African sports enthusiast.

Streetcar (http://www.streetcar.com) was founded in 1998 and is an innovative online gift voucher service allowing Internet users across the world to send gift vouchers to South African recipients, enabling especially expatriates to stay connected with friends and family in South Africa. Presently vouchers for sixty retail brands are offered, including some major South African retail brands like Woolworths, Truworths, and Exclusive Books.

TimberAfrica (htpp://www.timberafrica.com) was a trading portal designed to service South Africa's timber industry. An information portal named TimberSA (htpp://www.timbersa.com) was also developed to provide members with industry news, access to product information and industry statistics (ITWeb, 2000). The online trading initiative did not succeed and only the information portal is still functional.

Tradestream (http://www.etradestream.com), an information technology solutions company for freighting logistics, is a joint online venture of Rand Merchant Bank and Dimension Data initiated in February 2000 (Schultz, 2000). It entails software that links companies, customers and suppliers. The product enables companies to amalgamate fragmented inventory and supply chain information across trading networks and use the information obtained to significantly reduce inventory carried while maximising customer order fulfilment.

Travel.co.za (http://www.travel.co.za) is a joint venture between the travel consortium Tourvest (including Seekers Travel) and the Australian based travel.com.au and was developed as a pure online offering for the South African market. Information on travel and destination, as well as flight and leisure options, are offered on the website. All major airline prices are displayed on one page and information on particular market niches such as adventure travelling is also provided. Travel.co.za provides a complete service and not just booking facilities. It manages every aspect of the trip, for example, providing the latest and the most competitively priced airfares, packages, insurance, car rental, and hotel accommodation available on the Internet.

Tutuka (http://www.tutuka.co.za) is a discount voucher site founded in 1998 and one of the oldest business-to-consumer players in South Africa. Online customers can download and print digital coupons from the website, which may be used in physical stores as discounts on purchases. Recently Tutuka merged their online shopping operations with Johnnic-owned Ananzi Shopping to focus on the technology side of its business (Manson, 2003). However, the brand name of Tutuka was kept.

When the initial identities (2001) of the above online offerings were measured against the established prerequisite characteristics of what is considered to be a valuable brand, virtually none of the prerequisites held true. Most of the above-mentioned offerings did not enjoy instant recognition or identification, did not define a category, sometimes had a creative instead of a unique selling proposition, had not evolved at that time, or had not proven their durability over a period of time. However, over a period of two years, the identities have not stayed stagnant, either evolving or dying. The dynamics of identities from 2001 to 2003 will be discussed in the latter part of the paper.

3.2 The niche brand

The niche brand is a product or service that has familiarity and meaning to a defined, small group of consumers. The niche brand has awareness, unaided recall and preference amongst a small specific group of consumers. However, it will most probably be unfamiliar to consumers outside the speciality niche (Braunstein & Levine, 2000: 73).

South African niche brands may include: Africam, Bluebean, CareerJunction, eBucks, eDegree, Flysaa, Kalahari.net, PNet, Tanua, and Tradek.

AfriCam (http://www.africam.com) was South Africa's first online game reserve (Jesse, 2000: 39). From September 1998 it transmitted live Internet images of wildlife subjects from the Djuma game reserve. AfriCam accounted for 45 per cent of South Africa's Internet traffic in the third quarter of 1999 with an estimated turnover of R60m plus for the year 2000 (*Keenan*, 2000:43). By the end of 2000, AfriCam was not only the largest website in Africa but also one of the most successful online companies (*Finance Week*, 2000: 31) judged on the viability of the business impact, the innovation of the business model, technology and process, level and source of investment, and implementation of management strength, income streams, and surfer to user conversion (The current status of Africam, 2003a; 2003b). However, during October 2001, AfriCam applied to the High Court for provisional liquidation. In January 2002, the High Court approved a bid by a consortium of investors to buy the AfriCam business (Africambook, 2002). However, during October 2003, only the AfriCam Book website (http://www.africambook.com) was accessible and AfriCam announced its voluntary liquidation (Manson, 2003).

Bluebean (http://www.bluebean.com) is the Standard Bank of South Africa's e-commerce initiative. It originally featured an independently branded credit card purchasing system underwritten by MasterCard, secure shopping combined with a loyalty program as well as free Internet banking. The financial difficulties (see below) that confronted Tanua Holdings, Bluebean's retail partner, resulted in Bluebean temporarily abandoning its retail initiative, in spite of generating revenues of approximately R2.8 million a month, to refocus instead on financial products and services (Manson, 2003).

Career Junction (http://www.careerjunction.co.za) is a joint venture between Johnnic Digital and Adcorp Holdings and was launched in June

2000 with two main targets: the online career seeker and the online recruiter.

eBucks (http://www.ebucks.com) is an Internet purchasing mechanism, initially launched in 2001 as a virtual currency that customers could earn on certain First National Bank products such as credit cards, home loans, and Wesbank vehicle finance. The initiative was launched to motivate the massive customer base of the FirstRand Group to venture into and participate in Internet banking through an existing First National Bank account. eBucks has replaced FirstOnline (First National Bank's internet banking offering) to become the FirstRand Group's e-commerce hub. The incorporation of MTN CallAwards users increased the total eBucks users to 260 000, to provide critical mass together with Exclusive Books Fanatics members.

eDegree (http://www.edegree.co.za) was established in 1998 and provides e-learning and online-learning support through a synergy of Internet facilities developed by eDegree and content provided by some South African universities of which the University of the Free State is probably the most prominent. eDegree offers a wide variety of study options such as MBA, LLB and B.Com degrees within an online environment. The holding company of eDegree is E-Learning Systems with Johnnic and PricewaterhouseCooper as shareholders.

Flysaa (http://www.flysaa.com*)* was launched in March 2001 as the online offering of South African Airlines. It is integrated with the Voyager loyalty programme and offers online air travel bookings and payments, as well as hotel and car rental arrangements.

Naspers decided on an alternative brand name for its online brand offering *Kalahari.net (*http://www.kalahari.net), which was launched in 1999. Kalahari.net is the local replica of the American giant Amazon.com as it also sells books, DVDs, videos, music and wine. Kalahari.net is arguably one of the most successful local e-commerce initiatives and gradually replaced Amazon.com in South Africa as they optimised their logistical advantage and the local Internet infrastructure improved.

Personnel Net (http://www.pnet.co.za), one of the largest e-recruitment sites, was established in 1996 as an online recruitment service provider and is a member of the EPI-USE Group of companies, a leading provider of SAP Human Resources systems with operations in North America, Africa, the United Kingdom, Europe, Latin America, and the Asia Pacific region. All PNet's business is generated through its Internet infrastructure.

Tanua was the retail operations partner of Bluebean. It held minimum inventory and operated in real time with just-in-time ordering. The former enabled the company to offer wide product ranges with no inventory restrictions, as well as highly competitive prices. However, Tanua Holdings failed to raise the R50 million it had sought from the market and was forced to sell off several of its business units while its online consumer arm was closed (Manson, 2003).

Since its inception in 1996 as MST Online, *Tradek* (http://www.tradek.com) operates in the online share trading market, assisting customers with online share trading decisions by providing information. In the late nineties when trading was down, Tradek increased its service offering and expanded its product base to include offshore investing, warrant trading, managed portfolios, and unit trusts. Since the company has listed (1999) on the Johannesburg Securities Exchange (JSE) it has formed a major partnership with Sanlam and again augmented Tradek's service offering to include life insurance, cash management and other online financial services for the private client. In March 2002 the online stock broking pioneer was swallowed up in a reverse takeover by PSG Investment services, partly due to the R7 million operating loss in 2001 (Hogg, 2002), but the brand name stayed the same.

Most of the above niche brands have awareness amongst a relatively small specific group of consumers, though may not yet define a category or have an established unique selling proposition. Whether the said brands also enjoy unaided recall and preference, is still an open question. Some of the niche brands have evolved, although it may be too soon to judge if they have also endured and maintained consistency. However, over a period of two years (2001 to 2003) the niche brands appear to have remained relatively stable. The dynamics of niche brands from 2001 to 2003 will be discussed in the latter part of the paper.

3.3 The trade brand

A trade brand is a product or service (that meets certain commercial qualifications) that has familiarity and meaning to a defined, small group of customers, also referred to as trade customers. The brand has awareness, unaided recall and preference only amongst the small group of trade customers (Braunstein & Levine, 2000: 72-73).

South African trade brands typically include brands like Agri24, F@rm24, Healthbridge, Motoronline, and Sparesnet.

F@rm24 (http://www.farm.24.com) was part of *Agri24.com* (http://www. agri24.com). Both trade brands belonged to Naspers and primarily concentrated on providing the farming community with the technological ability to trade online. F@rm24 and Agri24 were branded separately as they offered different services. The former facilitated transactions and the latter served as marketing portal for producers. Agri24's link with AgriSA, the business-to-business website of the South African Agricultural Union, provided it with secured access to the country's commercial farmers (McLeod, 2000). The activities of Agri24 and F@rm24 were discontinued when the auction platform did not meet the budget (Naspers Annual Report 2002, 2003).

HealthBridge (http://www.healthbridge.co.za) is a R54 million joint venture between Discovery Health, Medscheme and Dimension Data. HealthBridge processes real-time business-to-business medical claims (verification and eligibility checks) in the health industry. It is a real time Internet based service that offers real time claim verification and eligibility checks.

Motoronline (http://www.motoronline.co.za) is the online service provided through a partnership between the retail motor industry, Didata, and Wesbank. It functions as a fully transactional vertical portal for the motor industry and its customers. The customer is able to search online for product types, brands, and prices; compare features of individual vehicles; and consult articles and reports by specialist journalists.

Sparesnet is an online service brand specialising in the aftermarket, linking auto trade services, garages and fitment centres.

The above trade brands have awareness amongst a relatively small and specific group of trade consumers. With the exception of HealthBridge, the trade brands that still exist do not yet define a category or have an established unique selling proposition, nor do they seem to have evolved, endured, or maintained consistency. Over a period of two years (2001 to 2003), the trade brands appear to have remained less stable than the niche brands. The dynamics of trade brands from 2001 to 2003 will be discussed in the latter part of the paper.

3.4 The true brand

The true brand is broadly recognised and connected by consumers to a specific, yet generally narrowly defined, product or service offering. The true brand has awareness, high-unaided recall and preference with consumers across broad demographics.

South African true brands typically include ABSA, Pick & Pay and Unisa.

ABSA (http://www.absa.co.za) does not use its website for non-bank business such as retailing but rather to promote the financial products offered within the ABSA group. ABSA does not only provide internet banking to its clients, but also access to the Internet. Extensive information on financial and economic issues is also on offer. Mainly due to the free Internet service ABSA offered in 2002 it has become the largest Internet banker, and was voted the most admired financial brand in the recent Markinor top brands survey (Ikalafeng, 2003).

Pick 'n Pay (http://www.picknpay.co.za) is a leading retail brand. Pick 'n Pay's online offering, called Pick 'n Pay Home Shopping, was integrated into the existing physical infrastructure. Existing retail stores and distribution centres are used to fulfil orders placed via the Internet instead of investing in the additional development of separate physical infrastructures to support the online offering. Pick ‘n Pay together with Nedcor are offering additional banking products to the active users of Pick ‘n Pay’s financial services.

The University of South Africa or *UNISA* – (http://www.unisa.ac.za), having established itself as the leading tertiary distance educator, offers a complete online learning program that includes email contact with course facilitators, live student discussion forums, access to and purchase of study material, as well as submission and return of assignments. The online service UNISA is accessible 24/7 from any country in the world.

The above true brands have awareness and enjoy recall as well as preference across broad demographics. These true brands define a category, have an established unique selling proposition, have evolved, endured and maintained consistency. Over a period of two years (2001 to 2003), the true brands appear to have remained more stable than the identities, niche and trade brands. The dynamics of true brands from 2001 to 2003 will be discussed in the latter part of the paper.

3.5 The super brand

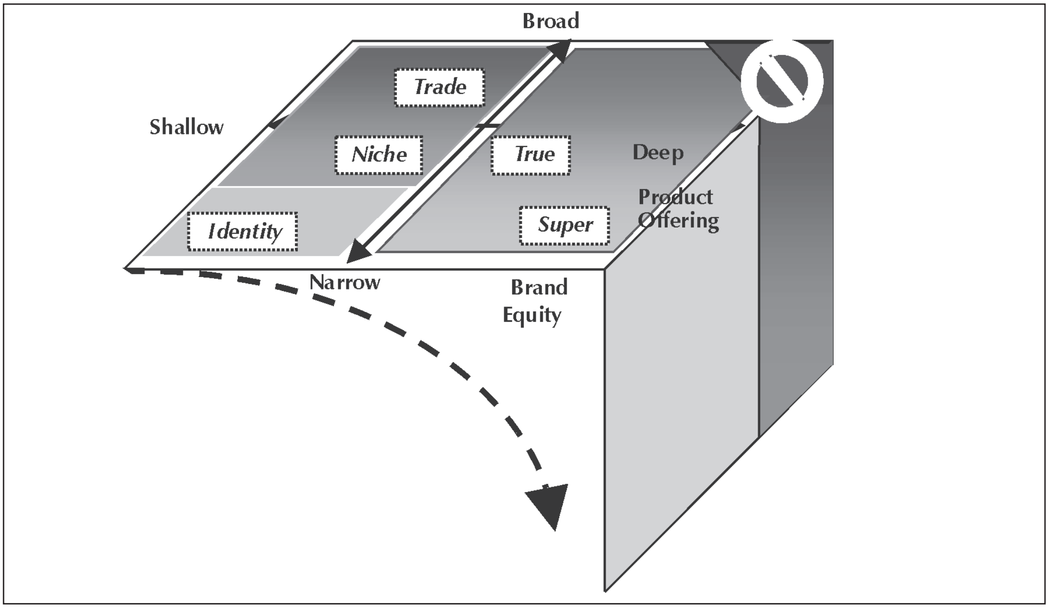
The super brand has instant and universal awareness. The meaning of the brand is clearly understood, as it embodies not only values and meaning but also a lifestyle consumers can identify with, over and above the product or service the brand represents. The super brand may in fact be synonymous with the product or service and reaches tens and hundreds of millions of consumers (Braunstein & Levine, 2000: 74).

Although it is debatable if a brand exists in the South African environment that may be compared to a super online brand such as Yahoo! or offline brand such as Coca-Cola, it is the contention of this paper that a comparable South African brand, be it online or offline, measured against the prerequisites in respect of quality, does not exist.

4 The plotting of selected South African online brand offerings on the three dimensional brandscape model

The Brandscape Model (Braunstein & Levine, 2000: 71-75) portrays the relative brand value (deep or shallow) of brands along its “horizontal axis” and the scope of its offerings (broad or narrow) along its “vertical axis” (see Figure 1 below). If a brand deepens it moves to the right on the “horizontal axis”, and the quantity and quality of the prerequisite characteristics and resultant benefits of a valuable brand accumulate. If a brand’s offering widens – increasing the quantity of products and services offered – it moves to the back of the “vertical axis”. A brand with a narrow offering and low value would thus typically be classified as an identity. A brand with a slightly broader offering and more (deeper) value can be called a niche brand. A brand with an even broader offering but the same depth of value compared to a niche brand can be called a trade brand. A true brand is a brand with the same breadth of offering as a niche brand but with more (deeper) value. A super brand has a slightly narrower offering compared to a true brand but has even deeper value. It should, however, be noted that a brand cannot have a broad product offering and deep value at the same time, hence the quagmire in the right hand corner of the model.

Figure 1
The Brandscape model



Source: Adapted from Braunstein & Levine (2000: 70)

The brands discussed under section three above can be categorised in table format according to the brand categorisation model of Braunstein and Levine (2000), as it appeared in 2001 and 2003 respectively (see Table 1 below).

C = Categorisation; **I** = Identity; **N** = Niche; **Td** = Trade; **Tr** = True; **D** = Died

Table 1:
Brand categorisation

Brand		2001		2003	
		C	Motivation	C	Motivation
1	20twenty	I	New offering. Registered 10 000 clients within first two weeks of operation.	N	Market penetration of 40 000. 300% increase in 18 months, in spite of parent brand Saambou having being placed under judicial management.
2	ABSA	Tr	One of the largest banks in South Africa. Online offering broadly recognised.	Tr	Increased size of customer base with free Internet access offering. Largest number of online banking clients
4	AfriCam	N	Recorded 30 million page impressions per month by the end of 2000. Voted top dot-com in South Africa in 2001. Familiarity amongst nature lovers.	D	Filed for liquidation in October 2001 and was sold in January 2002 to a consortium. Applied for voluntary liquidation in October 2003. URL could not be retrieved.
5	Agri24	Td	Portal became functional in April 2001. Familiarity amongst farming community.	D	Discontinued.

Brand		2001		2003	
		C	Motivation	C	Motivation
6	Auto-world	I	Functional from 2001. Limited awareness.	N	Industry portal. Awareness amongst automotive community.
7	BestBond	I	Size of customer base unknown. Limited awareness.	I	Size of customer base unknown. Limited awareness.
8	Bluebean	N	By February 2001, 13 000 cards had been issued. End 2001, 14 000 cardholders and 40 000 online shoppers.	N	Retail operations ceased. Repositioned as branded credit card for new market segment.
9	BondNet	I	Limited awareness. Claims to have processed 1 500 applications (worth R750 million, of R60 billion market) by the end of 2001.	I	BondNet amongst top 10 of online mortgage originators in South Africa out of a total of between 40 and 100.
10	Career Junction	N	Launched 2000. Familiarity amongst jobseekers and recruiters.	N	Increased awareness through Johnnic Media. 150 000 unique users. 2 m page impressions per month. One of top 5 most visited sites.
11	Collabo-rative Xchange	I	Newly established online offering.	I	Size of customer base unknown. Limited awareness.
12	Digital Mall	I	Newly established online offering.	N	Estimated 40% of total B2C online market in South Africa.
13	Digiturf	I	Online horse racing community. 8% of unique visitors were converted to registered users.	N	Increased application and greater awareness amongst horse racing community.
14	eBucks	N	Launched in January 2001. By July 2002, 52 000 active users.	N	Expect 260 000 members by end 2003 due to incorporation of MTN CallAwards and migration of the remaining 40 000 FirstOnline customers.
15	eDegree	N	Established 1998. Partnerships with major South African universities. Awareness amongst learning community.	N	Partnerships with leading national and international academic institutions. Wide range of clients.
16	eFreight	I	Joint venture formed in February 2000. Limited awareness.	Td	Joint venture with US based FreightMatrix with rapidly growing online customer base. Formed strategic alliance with Accenture in Europe.
17	E-Mail Corpora-tion	I	Online only company, established 1999. Limited awareness.	I	Online brand name changed to Striata. Limited awareness.
18	F@rm24	Td	Signed up 12 of 30 largest SA agricultural businesses. Part of Agri24 online offering. Familiarity limited to farming community.	D	Discontinued.

Brand		2001		2003	
		C	Motivation	C	Motivation
19	Flysaa	N	Launched mid-March 2001. Awareness amongst frequent travellers.	Tr	Deeper customer awareness, covering broad demographics. Broadly recognised.
20	Fundsnet	I	Launched November 2000. Limited awareness and only a few clients.	D	Discontinued June 2002.
21	Health-bridge	Tr	Launched August 2000. Awareness amongst health industry.	Tr	Almost 80% of medical insurance in South Africa. Independently ranked as SA's leading B2B e-commerce company to the medical industry. Services 1 000 medical practices.
22	Icanon-line	I	Joint venture between Nedbank (originally BoE) and M-Web. Limited awareness.	N	Increased awareness due to Nedbank association.
23	Inthebag	I	R65M spent by June 2001 to acquire 17 000 online shoppers of which 5 000 were regular. Limited awareness.	D	Sold to Woolworths Group as channel extension. From October 2003 removed from parent website.
24	Jobfood	I	Functional from 2001. Limited awareness.	N	Increased awareness and usage.
25	JobNavi-gator	I	Limited awareness.	I	Rebranded offering in 2002. Limited awareness.
26	Kalahari. net	N	Growing month on month revenues entering 2001. Revenues increased 500% in 2001.	N	More than 50 000 active customers. Expected to turn first profit in 2003.
27	Kulula. com	I	Launched July 2001. Limited awareness.	N	One of SA's largest online retailers with 65% of transactions conducted via the Internet.
28	Mega-shopper	I	McCarthy Online initiative. 1 000 regular online shoppers in 2001. Limited awareness.	I	Considered to have performed well. Still limited awareness with little unaided recall.
29	Mortgage SA	I	Processed 12 000 applications of which 2 to 5% were online. Limited awareness.	N	Has processed in excess of R20 bn (65 000 clients) in loans the last 3 years.
30	Motor-online	Td	Trade specific offerings.	Td	Concluded several agreements with motor industry providers.
31	Mylife	I	2000 subscribers, only 50 clients.	D	Discontinued.
32	Nation-wide	I	Established 1995. Limited awareness.	N	Full partnership with Virgin Atlantic. Increased awareness.
33	Pick 'n Pay	Tr	Deep awareness, preference and recall.	Tr	Deep awareness, preference and recall.
34	Personnel Net	N	Established 1996 as online only venture.	N	One of largest e-recruitment sites.

Brand		2001		2003	
		C	Motivation	C	Motivation
35	PSG Online	I	Entered the market after Tradek and U-Trade. Limited awareness.	N	130 000 online clients, processed 4.5% of all trade on JSE. PSG Online generates half of PSG's brokerage.
36	SchoolNet SA	I	Launched in 1997. Various partnerships.	Td	Increase in number of national and international partnerships and participation in projects.
37	Sparesnet	Td	Awareness amongst automotive community.	Td	Trade market expanded.
38	SportsBet	I	Online channel offered to established spread-betting service.	I	Still limited awareness.
39	Streetcar	I	Online only venture. Limited awareness and clients.	N	Increased awareness due to alliances with major national online and offline retail brands. Familiarity mostly amongst expatriates.
40	Tanua	N	Retail operations partner of Bluebean. 40 000 customer base.	D	Failed to raise adequate capital to continue with venture: closed down retail operations.
41	Timber-Africa	I	Projected to deal with 30% of South Africa's timber industry by 2003.	Td	Changed brand name to TimberSA. Awareness amongst timber community.
42	Tradek	N	One of first online traders. Established in 1996.	N	40 000 customers. Acquired by PSG Investment Services in 2002.
43	Trade-stream	I	Initiated February 2000. Limited awareness.	Td	Increased awareness amongst international traders.
44	Travel. co.za	I	Established in 1998. Limited awareness.	N	Increased awareness amongst travellers.
45	Tutuka	I	Online only venture: digital coupon provider, founded in 1998.	Id	Merged with Ananzi shopping. Still limited awareness.
46	UNISA	Tr	Deep awareness, preference and recall.	Tr	Deep awareness, preference and recall.

The proportion of each brand category and its proportional shift from 2001 to 2003 was calculated and is presented in Table 2 below:

Table 2

Proportional shift and change in brand categories: 2001-2003

Brand categorisation	2001	Proportion (%)	2003	Proportion (%)	% Change
Identity	28	60.87	8	17.39	– 43.48
Niche	10	21.74	19	41.30	19.57
Trade	5	10.87	7	15.22	4.35
True	3	6.52	4	8.70	2.17
Super	0	0.00	0	0.00	0.00
Died	0	0.00	8	17.39	17.39

From Table 2 it is evident that a negative shift only occurred in the identity category (-43.48 per cent), which is quite understandable as awareness usually increases over time. The largest growth was in the niche category with limited growth in the trade and true categories.

The proportional shift and change in brand categories from 2001 to 2003 in the South African online product and service brand environment is graphically illustrated in the two graphs below.

Figure 2
Proportional shift in brand categories: 2001-2003

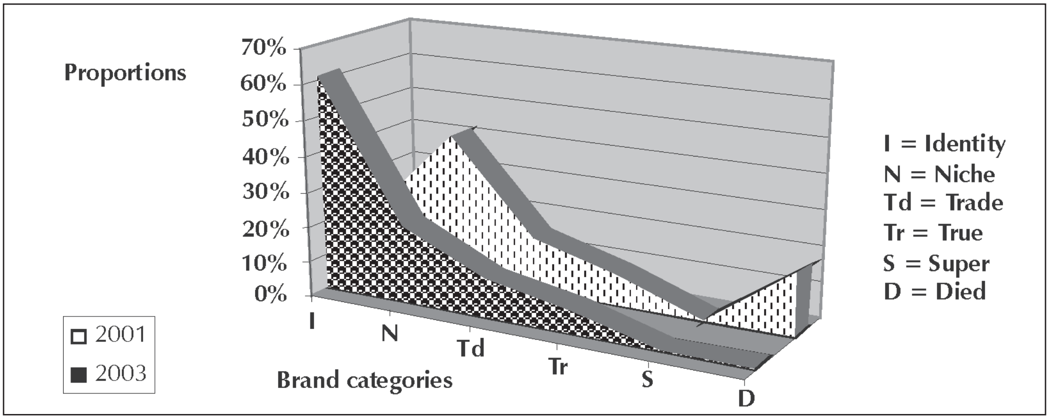
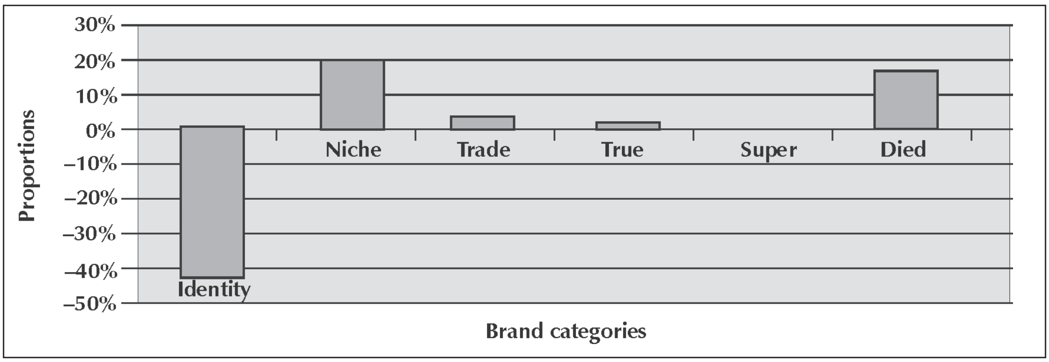


Figure 3
Proportional change in brand categories: 2001-2003

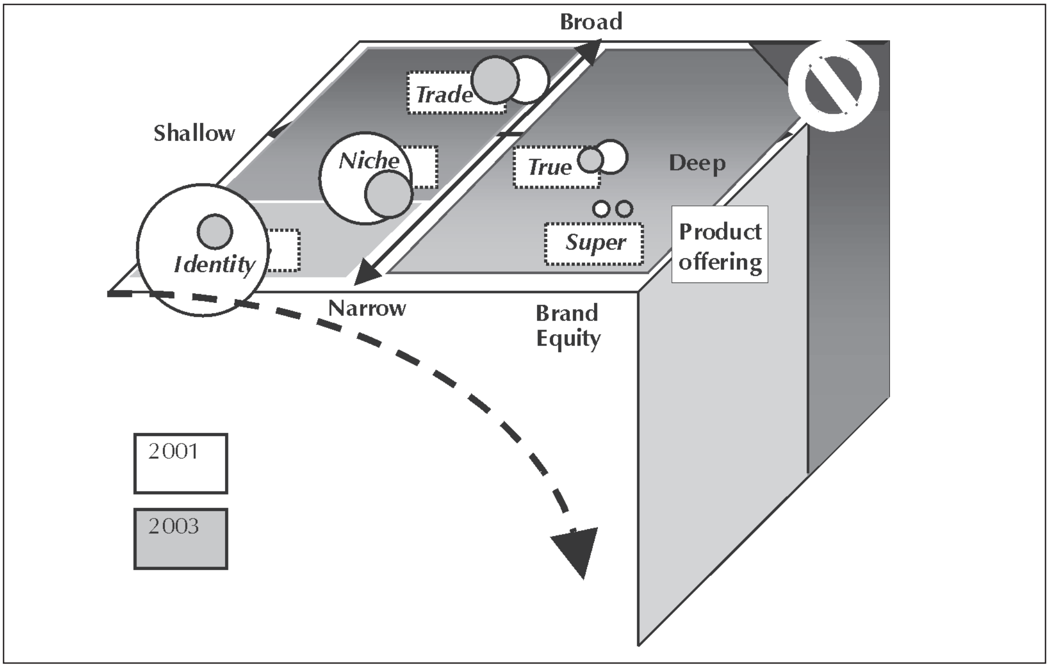


In section five below, the change in proportional differences between the brand categorisations for 2001 and 2003 will be plotted on Braunstein and Levine's (2000) Brandscape Model to demonstrate the application of the model in the interpretation of depth of value and breadth of offering.

5
Summary and conclusions

The brand categorisation of Braunstein and Levine (2000) proved to be a valuable tool to categorise online product and/or service brand offerings of selected South African companies. The categorisation made it possible to calculate the proportion of brand categories and track shifts and changes in brand categorisations over a two year time period. To get an overview of a selection of the South African online brand landscape the proportional changes were finally plotted on the Brandscape Model (see Figure 4 below) and some conclusions were made.

Figure 4
Proportional change in brand categories plotted on the Brandscape model



Of the twenty eight identities in 2001, eight identities remained identities in 2003, twelve identities evolved to niche brands, four identities evolved to trade brands and four identities died. Although the proportion of identities decreased dramatically with 43.48 per cent from 2001 to 2003, the decrease may only be partially attributable to the failure of new ventures. More identities evolved (to niche and trade brands) than died, which means that the awareness, recall and preference of these identities increased, which in turn translates to increased brand value. The seven identities that appear to have remained stagnant, may indeed have experienced an increase in awareness, recall and preference but not to the extent that the brand may be judged to have evolved to another brand categorisation.

Of the ten niche brands in 2001, seven remained niche brands, two died and one evolved to a true brand. However, by 2003, nine brands have evolved to the niche category. This may be interpreted to mean that awareness, recall, and preference of brands within the niche category have increased more when compared to other categories. The one niche brand that evolved to a true brand shows that awareness, recall and preference of a brand can increase to such an extent over a two year time period that the brand evolves to a category where substantial brand value is added.

Three of the five trade brands remained trade brands and two of the trade brands died over the two year period. Trade brands increased from five in 2001 to seven in 2003. The four new trade brands evolved from identities and not only replaced the trade brands that did not succeed but also added new trade brands, increasing the number of trade brands. The increase in awareness, recall and preference of the trade brands confirms that the brand has become more secure and adds more value.

The true brands experienced the least amount of change, increasing from three brands in 2001 to four in 2003. These brands reflected stability, partly due to marginal evolution.

The reasons why eight of the identities and brands died may possibly be explained by the absence of consistency and clear value and meaning expressed over a sufficient period of time to turn the identity or brand into a valuable asset.

Brand value is created by niche-, trade-, true-, and super brands to various degrees. The value of an identity is its evolutionary potential, not its ability to create long term advantages. If the number of identities decrease, the impact will not be as severe on an industry or shareholders as it would be, should a true brand not survive. The presence of certain attributes (like brand awareness) that create value for the true brand, is the attributes that are most probably absent in the identity, ultimately responsible for its failure.

The super brand is synonymous with a certain branded lifestyle and should be recognised by tens or hundreds of millions of people, for example Coca-Cola and Amazon.com. A super brand is extremely valuable and maintains a balance between narrow and broad product and/ or service offering. All the benefits that accrue to the valuable brand accrue to the super brand because the personification of the prototypic valuable brand is the super brand. However, measured against these parameters, none of the South African online brands qualify.

6 Managerial implications

If a brand's benchmarked position is not aligned with its strategised context, a manager has certain options. The brand can be evolved to the strategised context through the selection and application of Carpenter's (2000) success drivers. For example a benchmarked identity can evolve to a strategised niche by increasing awareness in a specific group of customers and investing capital over a substantial time period to cultivate customer commitment, deliver outstanding value, and so forth. The applicable success drivers are dependent upon the unique amalgamation of each brand's structural components (Kruger & Fourie, 2003a).

Although the researched brands indicated that the brand landscape in South Africa is possibly more positive than would be expected if superficially contemplated, some brands survive and others do not. Holders of identity products and/or services should work at creating sustainable awareness, recall and preference. These three requisites are what ultimately evolve the brand to an increased value creating position. Niche brand holders should not let initial success (such as many website visitors) deter them from creating sustainable value and evolutionary initiatives. Trade brand holders may be wise to make sure that the market size justifies the venture capital expenditure and that potential consumers are not automatically translatable into value creating users. True brand holders should maintain, or if possible deepen the brand's awareness, recall, and preference by concentrating on the brand's intangible attributes.

7 Recommendations for future research

In the first instance, further research aimed at continuing the longitudinal study, comparing categorisation shifts in 2003 to 2005 and investigating the dynamics of such shifts, is recommended. In the second instance, further research that could determine the contribution of an offline brand offering to its online diversification with specific reference to industry and brand category is necessary (Kruger & Fourie, 2003b).

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