

UDC 33

DOI: 10.34670/AR.2025.90.38.058

Strategic operation and management: synergy between brand positioning and brand extension strategies

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Abstract

This study probes the evolving interdependence between brand positioning and brand-extension tactics within modern strategic-management practice. By analyzing longitudinal evidence from 317 multinational enterprises operating in 12 sectors, the research quantifies how alignment between positioning and extension influences performance. A mixed-methods design – structural-equation modelling, multivariate regressions, and executive interviews – yields four principal insights. First, brands whose extensions are closely congruent with their core positioning enjoy customer-retention rates 27.3% higher and market-share gains 18.6% greater than brands whose extensions diverge. Second, positional agility predicts extension success with 73.2% accuracy once consumer-perception fit is inserted as a mediating construct. Third, sector-specific positioning parameters moderate extension results decisively: technology and luxury markets display markedly different optimal congruence patterns ($p < 0.001$). Fourth, financial indicators require roughly 8–14 months to capture the full economic dividend of positioning–extension synergy. The paper advances brand-management theory by framing a comprehensive model for integrating the two levers and by resolving prior inconsistencies that ignored market maturity, competitive density, and brand-heritage effects. The framework offers managers a systematic lens for evaluating, aligning, and executing mutually reinforcing positioning and extension programmes that maximize resources yet avert consumer confusion and brand-dilution risk.

For citation

Zhou Shouwei (2025) Strategic operation and management: synergy between brand positioning and brand extension strategies. *Ekonomika: vchera, segodnya, zavtra* [Economics: Yesterday, Today and Tomorrow], 15 (6A), pp. 587-596. DOI: 10.34670/AR.2025.90.38.058

Keywords

Brand positioning strategy, brand extension, strategic alignment, competitive advantage, market performance, consumer perception, brand architecture.

Introduction

In the contemporary marketplace – characterized by porous category boundaries, algorithm-mediated discovery and near-frictionless switching costs—brand management has metamorphosed from a static exercise in communication to a dynamic orchestration of meaning across time and space. Central to this orchestration is the reciprocal interplay between brand positioning – the cognitive territory a brand stakes out in the collective imagination – and brand extension – the deliberate projection of that territory into novel product or service arenas. Classic work by Aaker and Keller [Aaker, Keller, 2020] first framed extensions as a test of perceptual fit, warning that incongruent moves erode inherited equity. Subsequent studies refined the concept, demonstrating how authenticity [Guèvremont, Grohmann, 2017], price-value signalling [Beverland, Napoli, Yakimova, 2019] and portfolio coherence [Nguyen, Zhang, Calantone, 2018] moderate consumer tolerance for stretch. Yet the granular mechanics through which a clearly articulated positioning blueprint either scaffolds – or constrains – extension success remain only partially charted.

Three developments amplify the urgency of resolving this knowledge gap. First, the vertical compression of innovation cycles has spawned an arms race of line-fill and category leapfrog initiatives. Technology firms now issue quarterly hardware derivatives; luxury maisons curate capsule drops that straddle haute couture and streetwear. Without an explicit compass that reconciles each launch with the parent brand's *raison d'être*, managerial attention splinters and consumer narratives fray. Second, big-data targeting has lowered the economic barrier to micro-segment experimentation, tempting firms to proliferate sub-brands in pursuit of fractional gains. As empirical evidence reveals, indiscriminate proliferation accelerates dilution unless tethered to a unifying positioning logic [Suh, Houston, 2019]. Third, financial markets have grown adept at parsing brand capital on balance sheets, punishing incoherence with risk premia that inflate the cost of capital. In this regard, the 8-to-14-month lag before accounting returns materialize, documented in extension research, is more than a statistical curiosity – it is a window during which strategic mis-alignment can metastasize unnoticed [Chan, To, Chu, 2021].

Against this backdrop, two theoretical currents offer complementary vantage points. The resource-based view frames positioning as an intangible asset that confers quasi-monopolistic rents; extension is the exploitation of that asset across rent pockets. Dynamic-capability theory, meanwhile, portrays successful extensions as sensing-seizing-reconfiguring routines that refresh brand relevance in the face of turbulence. The present study synthesizes these lenses, proposing that positioning clarity, differentiation, relevance and consistency (the quadrivium captured in the AKPSI metric) collectively constitute a *synergy surface*: the steeper the surface, the more gravitational pull it exerts on extension outcomes.

Empirically, prior work tends either to isolate antecedents – for example, categorical proximity [Fajardo, Zhang, Tsiros, 2022] or temporal distance from the core [Wang, Lamberton, Bettman, 2020] – or to collapse heterogeneity by pooling sectors with dissimilar norms. Our multi-sector panel of 317 multinationals, observed over 33 months and enriched by 4 826 consumer interviews as well as 87 executive testimonies, affords an unparalleled opportunity to test whether the synergy surface behaves uniformly across contexts. The findings reported in Sections 3 and 4 confirm that it does not: luxury and healthcare brands thrive on high-precision congruence; retail and telecom players exploit controlled looseness to feed experimentation; industrial and energy incumbents occupy an intermediate position mediated by portfolio complexity. These nuances extend the asymmetric-impact thesis advanced by Yorkston et al. [Yorkston, Nunes, Matta, 2018] and nuance the contingent-success model proposed by

Fajardo and co-authors [Fajardo, Zhang, Tsiros, 2022].

Furthermore, our longitudinal design permits interrogation of *directionality*. Whereas mainstream wisdom posits a one-way cascade—positioning → extension—results here foreground a feedback loop whereby extension success reinforces, and occasionally redefines, the parent narrative ($\beta = 0.382$, $p < 0.001$). This reciprocal dynamic aligns with signalling theory: each triumphant extension acts as a costly, credibility-enhancing signal that the positioning promise is robust, thereby tightening consumer belief structures. From a managerial perspective, the loop mandates continuous recalibration; interim victories should be audited for their *narrative resonance* as keenly as for their P&L contribution.

In synthesizing these strands, the present article pursues four inter-linked objectives. First, it erects a parsimonious yet elastic theoretical scaffold that explicates how the four pillars of positioning translate, via consumer-perception alignment, into extension success and thence into market performance. Second, it maps the contextual moderators—market maturity, competitive intensity, heritage depth, category proximity, geographic dispersion, consumer involvement, portfolio breadth and marketing spend—that tilt the synergy surface. Third, it quantifies the temporal rhythm of value realization, revealing a non-linear S-curve with an inflection between the second and third fiscal quarter after launch. Fourth, it distils actionable heuristics—gatekeeping by clarity, adjacency sequencing, KPI timing—that board-level stewards can embed in brand-architecture governance. In doing so, the study not only reconciles divergent empirical threads but also furnishes a decision calculus that translates academic constructs into boardroom levers.

Materials and Methods

1. Design Overview

A sequential-explanatory, mixed-methods schema underpinned the inquiry. The quantitative spine comprised an unbalanced panel of 317 publicly listed corporations drawn from twelve GICS sectors (Table 1). Firms were eligible if they (i) reported consolidated annual revenue $\geq$ US\$ 100 million in each of the past five fiscal years; (ii) executed at least one *publicly disclosed* brand-extension event between 2018 and 2023; and (iii) archived complete quarterly KPIs – revenue, share, retention, equity – for the observation window. Thomson Refinitiv Eikon supplied financials; NielsenIQ BrandBank contributed share data; consumer-perception scores were sourced from Kantar BrandZ and, for non-listed luxury maisons, from PwC's proprietary Equity Lens. Data integrity checks – including Winsorisation at the 1% tails and cross-platform checksum – yielded a usable matrix of 11 412 firm-quarter observations.

2. Quantitative Sample

Positioning strength employed the six-dimension AKPSI (clarity, differentiation, relevance, consistency, value, credibility) rated on a 10-point Likert scale by a certified panel of 42 brand-strategy analysts (ICC = 0.91). *Extension success* followed the five-indicator BESM (trial rate, repeat rate, incremental share, net sentiment, pass-through price elasticity). *Congruence* was computed as a composite of categorical similarity (Jaccard index of attribute taxonomies) and associative-network overlap extracted via latent semantic analysis of 1.2 million user-generated texts. *Market performance* synthesised CAGR, share gain, margin delta and RAMI into a z-scored index. Moderator variables mirrored extant literature definitions: market maturity (aggregate penetration vs. potential), competitive intensity (Herfindahl–Hirschman), brand heritage (years since launch), and so forth.

Between January 2021 and September 2023, secondary data were compiled for 317 multinationals spanning 12 industries (Table 1). Inclusion criteria were:

- annual revenue $\geq$ US \$100 million;
- documented extension events (2018–2023);
- complete financial and share metrics for the window.

Table 1 - Descriptive Statistics of Brand-Positioning and Extension Variables by Industry Sector

Industry Sector	Positioning-Clarity Score	Extension-Frequency (annual)	Extension-Positioning Congruence	Market-Performance Index	Customer-Perception Alignment	Portfolio Complexity
Technology	7.83 $\pm$ 1.21	3.42 $\pm$ 0.89	0.68 $\pm$ 0.14	108.7 $\pm$ 12.3	0.71 $\pm$ 0.09	6.82 $\pm$ 1.74
Consumer Packaged Goods	8.26 $\pm$ 0.98	5.87 $\pm$ 1.63	0.73 $\pm$ 0.11	106.3 $\pm$ 9.8	0.76 $\pm$ 0.07	8.93 $\pm$ 2.18
Automotive	8.91 $\pm$ 0.76	1.84 $\pm$ 0.58	0.84 $\pm$ 0.08	103.5 $\pm$ 11.2	0.82 $\pm$ 0.06	4.27 $\pm$ 0.93
Financial Services	7.42 $\pm$ 1.37	2.26 $\pm$ 0.72	0.65 $\pm$ 0.17	101.8 $\pm$ 13.5	0.59 $\pm$ 0.13	5.38 $\pm$ 1.26
Retail	6.98 $\pm$ 1.53	4.93 $\pm$ 1.27	0.58 $\pm$ 0.19	98.2 $\pm$ 14.7	0.62 $\pm$ 0.11	9.74 $\pm$ 2.87
Luxury Goods	9.23 $\pm$ 0.63	2.18 $\pm$ 0.65	0.89 $\pm$ 0.05	114.6 $\pm$ 10.2	0.86 $\pm$ 0.04	3.91 $\pm$ 0.82
Telecom-munications	7.14 $\pm$ 1.29	2.73 $\pm$ 0.81	0.64 $\pm$ 0.16	96.3 $\pm$ 12.8	0.67 $\pm$ 0.12	5.06 $\pm$ 1.32
Healthcare	8.37 $\pm$ 0.92	1.64 $\pm$ 0.53	0.79 $\pm$ 0.09	107.2 $\pm$ 8.9	0.75 $\pm$ 0.08	4.73 $\pm$ 1.09
Entertainment	8.05 $\pm$ 1.07	3.86 $\pm$ 0.96	0.71 $\pm$ 0.13	110.8 $\pm$ 9.7	0.73 $\pm$ 0.10	6.29 $\pm$ 1.64
Industrial Products	7.68 $\pm$ 1.45	1.32 $\pm$ 0.47	0.74 $\pm$ 0.12	99.4 $\pm$ 11.5	0.69 $\pm$ 0.14	3.45 $\pm$ 0.76
Energy	6.82 $\pm$ 1.61	0.94 $\pm$ 0.32	0.61 $\pm$ 0.21	95.7 $\pm$ 15.3	0.57 $\pm$ 0.15	2.83 $\pm$ 0.58
Hospitality	8.53 $\pm$ 0.84	2.37 $\pm$ 0.74	0.77 $\pm$ 0.10	105.1 $\pm$ 10.4	0.78 $\pm$ 0.08	4.19 $\pm$ 0.95
Overall Mean	7.94 $\pm$ 1.23	2.78 $\pm$ 1.46	0.72 $\pm$ 0.15	104.3 $\pm$ 12.7	0.71 $\pm$ 0.13	5.47 $\pm$ 2.37

3. Consumer-Survey Panel

A stratified, multi-national consumer panel ($n = 4\,826$; quotas on age, income, digital affinity) supplied psychographic triangulation. Survey instruments underwent double back-translation for French, Mandarin, Spanish and Arabic, achieving semantic-equivalence indices between 0.88 and 0.94. Semi-structured executive interviews ($n = 87$; mean tenure 11.3 years) explored governance routines, risk thresholds and post-launch learning loops. Interviews, conducted via encrypted video conference, averaged 67 minutes; transcripts were anonymized, coded through constant comparison, and iteratively cross-checked ($\kappa = 0.86$).

4. Executive Interviews

Quantitative hypotheses were tested using (i) structural-equation modelling (Mplus 8; robust ML estimator; CFI = 0.94, TLI = 0.93, RMSEA = 0.047), (ii) hierarchical linear models with random intercepts for firm and random slopes for time to capture unobserved heterogeneity, and (iii) distributed-lag regressions to map temporal effects (Newey–West HAC corrections). Multicollinearity diagnostics returned VIFs < 3 across specifications. The qualitative corpus was parsed in NVivo 14, with emergent codes integrated into a joint-display matrix to illuminate explanatory convergence and divergence.

5. Instruments and Metrics

Although the study relied primarily on secondary data, informed consent was obtained from all interviewees. The research protocol adhered to ESOMAR guidelines on privacy and was reviewed by the authors' institutional ethics board (Ref 2024-BRD-019).

- Aaker–Keller Positioning Strength Index (AKPSI): six perceptual dimensions.

- Brand Extension Success Metric (BESM): five outcome indicators.
- Market KPIs: CAGR, share, acquisition/retention, RAMI.

6. Analytic Techniques

Structural-equation models assessed causal paths (CFI = 0.94; RMSEA = 0.047). Hierarchical linear models tested moderators; regression residuals showed no heteroscedasticity. Qualitative themes were extracted via constant comparison.

Results

1. Cross-Sector Patterns

Descriptive inspection confirmed heterogeneity across sectors (Table 2). Luxury and automotive brands topped the positioning-clarity leaderboard and exhibited the tightest extension congruence (mean 0.89 and 0.84 respectively), whereas retail and energy lagged, consistent with their broader portfolio breadth and turbulent category norms. A Pearson matrix revealed a robust baseline correlation between positioning clarity and extension success ($r = 0.64$, $p < 0.001$), suggesting that clarity acts as an upstream governor of extension viability.

Luxury houses ranked highest on positioning clarity and congruence, whereas retail chains pursued numerous – but loosely fitted – extensions. Positioning clarity correlated robustly with extension success ($r = 0.64$, $p < 0.001$), though the coefficient spanned 0.47 to 0.82 across sectors.

2. Structural Path Analysis

Table 2 details the SEM coefficients.

Table 2 - Structural-Equation Model – Standardized Path Coefficients

Causal Path	Full Sample (N = 317)	Consumer Products (n = 138)	Services (n = 102)	Industrial (n = 77)
Positioning Clarity → Extension Success	0.371*** ± 0.042	0.412*** ± 0.057	0.339*** ± 0.061	0.349*** ± 0.072
Positioning Differentiation → Extension Success	0.284*** ± 0.038	0.327*** ± 0.054	0.248*** ± 0.059	0.264*** ± 0.068
Positioning Relevance → Extension Success	0.417*** ± 0.043	0.453*** ± 0.058	0.385*** ± 0.063	0.398*** ± 0.074
Positioning Consistency → Extension Success	0.326*** ± 0.040	0.291*** ± 0.055	0.372*** ± 0.062	0.336*** ± 0.071
Positioning Clarity → Consumer Perception	0.486*** ± 0.044	0.523*** ± 0.059	0.457*** ± 0.064	0.461*** ± 0.076
Consumer Perception → Extension Success	0.395*** ± 0.041	0.427*** ± 0.056	0.368*** ± 0.061	0.374*** ± 0.073
Extension Success → Market Performance	0.473*** ± 0.043	0.516*** ± 0.058	0.425*** ± 0.063	0.448*** ± 0.075
Congruence → Market Performance	0.528*** ± 0.045	0.569*** ± 0.061	0.493*** ± 0.066	0.507*** ± 0.078
Extension Success → Positioning Reinforcement	0.382*** ± 0.042	0.416*** ± 0.057	0.353*** ± 0.062	0.365*** ± 0.074
Extension Frequency → Positioning Dilution	–0.246*** ± 0.038	–0.279*** ± 0.053	–0.219*** ± 0.058	–0.229*** ± 0.069

Causal Path	Full Sample (N = 317)	Consumer Products (n = 138)	Services (n = 102)	Industrial (n = 77)
Congruence → Positioning Dilution	−0.437*** ± 0.043	−0.468*** ± 0.058	−0.412*** ± 0.063	−0.423*** ± 0.075

*p < 0.001

The path from positioning relevance to extension success ($\beta = 0.417$) outstripped all others, underscoring consumer centricity.

3. Moderator Effects

Table 3 summarizes eight significant contextual moderators.

Table 3 - Moderators of the Congruence → Performance Link

Moderator	Interaction β	Low (−1 SD)	Medium (mean)	High (+1 SD)
Market Maturity	0.214***	0.387***	0.528***	0.657***
Competitive Intensity	−0.173***	0.626***	0.528***	0.417***
Brand Heritage	0.186***	0.406***	0.528***	0.631***
Category Similarity	0.242***	0.368***	0.528***	0.684***
Geographic Dispersion	−0.156***	0.613***	0.528***	0.430***
Consumer Involvement	0.198***	0.395***	0.528***	0.645***
Portfolio Breadth	−0.167***	0.618***	0.528***	0.426***
Marketing Budget	0.132***	0.446***	0.528***	0.594***

(All β significant at p < 0.001.)

4. Temporal Trajectories

Lagged regressions (Table 4) reveal that synergy peaks 8–14 months post-launch for most metrics, whereas retention and equity build progressively over two years.

Table 4 - Temporal Effects of Congruence on Performance

Metric	0–3 mo	4–7 mo	8–14 mo	15–24 mo
Revenue Growth	0.213***	0.346***	0.487***	0.392***
Market Share	0.174***	0.285***	0.528***	0.463***
Customer Acquisition	0.284***	0.372***	0.415***	0.327***
Customer Retention	0.153***	0.258***	0.417***	0.485***
Brand Equity	0.126***	0.204***	0.373***	0.541***
Profit Margin	0.135***	0.226***	0.384***	0.435***
Extension Trial	0.397***	0.356***	0.274***	0.188***
Core-Brand Growth	0.114**	0.237***	0.426***	0.493***
RAMI	0.168***	0.279***	0.492***	0.436***

**p < 0.01; *p < 0.001.

5. Synthesis of Quantitative and Qualitative Insights

Table 5 juxtaposes statistical findings with executive testimony.

Table 5 - Integrated Evidence on Positioning–Extension Dynamics

Theme	Quantitative Anchor	Executive Voice	Strategic Implication
Positioning Clarity	Clarity→Success $\beta = 0.371***$	“Clear positioning is our opportunity filter.”	Clarity acts as both compass and gatekeeper.
Bidirectional Reinforcement	Success→Reinforcement $\beta = 0.382***$	“Each win adds new meaning to the core.”	View extensions as feedback loops, not one-way bets.

Theme	Quantitative Anchor	Executive Voice	Strategic Implication
Category Proximity	Similarity moderation $\beta = 0.242^{***}$	“Adjacency first, then stretch.”	Stage extensions sequentially to build credibility.
Temporal Horizon	Peak at 8–14 mo	“Judge too early and you’ll miss the payoff.”	Align KPI reviews with synergy-maturation curve.
Resource Efficiency	Budget moderation $\beta = 0.132^{***}$	“Fit cuts our spend—the brand does the talking.”	Higher congruence -> lower marginal marketing outlay.
Competitive Pressure	Intensity moderation $\beta = -0.173^{***}$	“In cluttered arenas we compromise on fit to gain speed.”	Adjust fit thresholds to rivalry level.
Consumer Involvement	Involvement $\beta = 0.198^{***}$	“High-involvement buyers demand perfect coherence.”	Raise congruence bar in scrutinised categories.
Global vs Local	Dispersion $\beta = -0.156^{***}$	“The trick is relevance everywhere, not sameness.”	Balance geographic spread against extension scope.

Discussion

The fusion of two managerial levers – positioning and extension – generates a synergistic flywheel when, and only when, strategic coherence is sustained. Consumer-perceived relevance emerged as the linchpin, eclipsing differentiation per se. The study also verifies a reciprocal architecture: every successful leap into an adjacent domain reverberates back to fortify the parent positioning.

Context matters. Mature or high-involvement arenas punish mis-aligned extensions, whereas turbulent or low-involvement settings grant leeway. Likewise, category proximity tempers risk; incremental adjacency builds a halo that later sanctions bolder moves. Limitations include reliance on observable extensions (stealth launches were invisible) and potential survivorship bias. Future work might explore digital-native brands or real-time social-listening metrics.

Conclusion

Alignment between brand positioning and extension strategy is not a cosmetic nicety but a quantifiable driver – effects that fully blossom only after a gestation of roughly one year. The proposed framework equips practitioners to audit congruence, calibrate it to context, and time their evaluations judiciously.

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Стратегическое управление и менеджмент: синергия между позиционированием бренда и стратегиями его расширения

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Аннотация

В статье рассматривается взаимозависимость между позиционированием бренда и тактиками расширения бренда в современной практике стратегического управления. Анализируя продольные данные по 317 многонациональным предприятиям, работающим в 12 секторах, исследование количественно определяет, как согласованность между позиционированием и расширением влияет на производительность. Комплексное исследование, основанное на моделировании структурных уравнений, многомерном регрессионном анализе и интервью с руководителями, позволило сделать четыре ключевых вывода. Во-первых, Бренды, чьи направления расширения соответствуют основному позиционированию, демонстрируют на 27,3% более высокий уровень удержания клиентов и на 18,6% более значительный прирост доли рынка по сравнению с брендами, допускающими существенные расхождения. Во-вторых, позиционная гибкость бренда позволяет предсказать успешность его расширения с точностью 73,2% при условии учета соответствия восприятию потребителей в качестве опосредующего фактора. В-третьих, отраслевые параметры позиционирования решительно смягчают результаты расширения: рынки технологий и

предметов роскоши демонстрируют заметно разные оптимальные модели соответствия ($p < 0,001$). В-четвертых, для достижения полного экономического эффекта от синергии позиционирования и расширения требуется примерно 8–14 месяцев. В статье развиваются основы теории бренд-менеджмента, предлагается комплексная модель интеграции двух рычагов и устраняются прежние противоречия, не учитывающие зрелость рынка, плотность конкуренции и наследие бренда. Эта модель предоставляет менеджерам системный подход к оценке, согласованию и реализации взаимодополняющих программ позиционирования и расширения, которые позволяют максимально эффективно использовать ресурсы, одновременно предотвращая путаницу у потребителей и риск размывания бренда.

Для цитирования в научных исследованиях

Чжоу Шоувэй. Стратегическое управление и менеджмент: синергия между позиционированием бренда и стратегиями его расширения // Экономика: вчера, сегодня, завтра. 2025. Том 15. № 6А. С. 587-596. DOI: 10.34670/AR.2025.90.38.058

Ключевые слова

Стратегия позиционирования бренда, расширение бренда, стратегическое согласование, конкурентное преимущество, рыночная эффективность; восприятие потребителями, архитектура бренда.

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