

# 行政院國家科學委員會專題研究計畫 成果報告

## 品牌組合策略對於消費者之品牌延伸評價之影響 研究成果報告(精簡版)

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計畫主持人：張愛華

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## 中文摘要

本研究檢驗產品組合之不同的品牌策略及不同的產品契合度之搭配下，消費者創新性對延伸產品評估的正向影響是否有限制條件。根據情境強度理論的主張，本研究指出品牌經理所選擇的品牌策略及產品契合度會給消費者情境線索，使消費者進行認知處理，在消費者心中建立情境強度。強情境相較於弱情境而言會減弱消費者創新性對新產品評價的影響。本研究使用混合實驗設計來驗證研究假設。

**關鍵詞：**情境強度、消費者創新性、品牌策略、產品契合度、新產品

## **Abstract**

This study examines the boundary of the positive effect of consumer innovativeness on new product evaluations by considering branding strategies and levels of perceived fit. Based on the theory of situational strength, this study demonstrates that branding strategies and levels of fit chosen by brand managers can emit situational cues to consumers, make consumers go through a cognitive process, and construct a situational strength in consumers' minds. Stronger situations attenuate the effect of consumer innovativeness on new product evaluations than weak situations. A mixed experimental design was used to validate the hypotheses.

**Keywords:** Situational strength, consumer innovativeness, branding strategy, product fit, new product

## **INTRODUCTION AND PURPOSES**

When companies launch their new products, innovators are likely to be their main target for the following reasons (Rogers 2003). First, they are earlier adopters of new products. Second, their roles as opinion leaders influence later adopters. The literature documents consumer innovativeness as an important personality trait for a new product to succeed (Klink and Athaide 2010; Venkatraman 1991; Xie 2008). However, extant researches indicated the effect of consumer innovativeness on adoption behavior is inconsistent (see Im, Mason, and Houston 2006). Consumer innovativeness has less effect on extension attitude and extension success under brand extension contexts (Martínez and Pina 2010; Vlöckner and Sattler 2006), but has more effect on new product evaluations under new brand context (Klink and Athaide 2010). The contrasting results make a question salient: When is consumer innovativeness less (more) important for a new product to succeed? The purpose of this article is to explore the boundary of the effects of consumer innovativeness on new product evaluations under situations of different strengths.

## **LITERATURE REVIEW**

### Consumer Innovativeness

Consumer innovativeness is defined as the global personality trait to desire the new experiences, and has sensory and cognitive dimensions (Hirschman 1980; Hirschman 1984). Observable characteristics (e.g., marketing strategy or communication) may work with consumer innovativeness to determine the probability of a new product being tried (Steenkamp and Gielens, 2003). Mischel (1968) argued that the influence of personality traits (e.g., consumer innovativeness) on human behavior should not be studied alone without considering situational cues. Thus, relevant situational cues in the introduction of new product are discussed next.

### Branding Strategies and Perceived Fit as Situational Cues

When introducing a new product, a firm can choose branding strategy among the options of brand extension, sub-branding, and new branding. Brand extension is used when a firm leverages an established brand. Sub-branding is used when an established brand is combined with a new brand name. New brand is used when a wholly new brand name is created (Keller 2003). A firm can also decide on fit levels and this decision influences the perception of fit. Perceived fit is defined as the degree to which consumers perceive a new product as being similar to other products affiliated with the

brand (Smith and Park 1992). The branding strategy and perceived fit are two important factors that influence the success of new products (Aaker and Keller 1990; Bhat, Kelly, and Donnell 1998; Smith and Park 1992; Volckner and Sattler 2006). In the evaluation of new products, situational cues such as branding strategy and perceived fit may interact with consumer innovativeness. We discuss this possibility under the theory of situational strength.

### Theory of Situational Strength

Mischel (1977), Meyer, Dalal, and Hermida (2010) propose that cues in the environment can implicitly or explicitly construct situations with different strengths on the mind of consumers, which in turn would hint consumers to respond in certain ways. Under stronger situations, the suggested behavior is clear, people will behave in a similar manner, and individual differences will be less important. Under weaker situations, the suggested behavior is ambiguous, and people will behave based on their personality traits. According to this theory, whether consumer innovativeness will facilitate the diffusion of a new product may be dictated by the strength of situation involved in the new product introduction. Branding strategy and perceived fit correspond to the two dimensions of situational strength: clarity and consequence with valence, respectively (Meyer et al. 2010).

### Situational Strengths Constructed by Branding Strategies and Perceived Fit

Different matches of perceived fit and branding strategy may form cues about the quality of a new product for the consumers as they go through a cognitive processes of new product evaluation. According to the theory of spreading activation of memory, cues can facilitate activation of knowledge about the parent brand to the different degrees (Anderson 1983). Specifically, under brand extension, the activated knowledge is more complete; while under sub-brand, owing to the new brand association may interfere with the old brand facts, so that the parent brand knowledge is only partially activated. Under new brand, the parent brand knowledge is not activated at all. Based on the previous research (e.g., Aaker and Keller 1990), if consumers perceive the new product fit well (worse) with the parent brand, they will have positive (negative) associations such as high (low) quality and reliability. Thus, perceived fit corresponds to the consequence (with valence) dimension of situational strength; and branding strategy corresponds to the clarity dimension. Therefore, high (low) perceived fit suggests positive (negative) consequences, and if it is coupled with different brand strategies, the strengths of the situations differ. Specifically, the suggested positive (negative) consequences are stronger for brand extension than for sub-brand and new

brand as well. Consumers are likely to include these situational strengths to the evaluation of new products.

H1a: When perceived fit is high, consumers will evaluate the new product with the extended brand more favorably than that with the sub-brand, and will evaluate the new product with the sub-brand more favorably than that with the new brand.

H1b: When perceived fit is low, consumers will evaluate the new product with the new brand name more favorably than that with the sub-brand, and will evaluate the new product with the sub-brand more favorably than that with the extended brand name.

### Consumer Innovativeness and the Effect of Situational Strength

Previous researches point out consumer innovativeness has positive effects on new product evaluation, yet the effects vary with different branding strategies. While some researchers found this effect is greater under brand extension (Martínez and Pina 2010; Vlöckner and Sattler 2006), other researchers found the effect is greater under new brand name condition (Klink and Athaide 2010). The contradiction can be investigated by considering the effect of situational strength. As discussed in the previous section, stronger situations are constructed for new products with a brand extension strategy, than those either with sub-brand or with new brand, regardless of the perceived fit. Based on the theory of situational strength, the influence of personality (such as innovativeness) has less effect on individual's behavior under strong situations. Therefore, we predict that the positive effects of consumer innovativeness on the evaluations of new products are attenuated (accentuated) under strong (weak) situations; that is, the difference of evaluation between high and low innovative consumers are larger when adopting a brand extension rather than a sub-brand or new brand strategy. We have the following hypotheses H2a and H2b:

H2a: Under high perceived fit, relative to consumers with low innovativeness, those with high innovativeness will evaluate the new product more positively, and this difference is larger when the firm adopts new brand than when it adopts either sub-brand or brand extension.

H2b: Under low perceived fit, relative to consumers with low innovativeness, those with high innovativeness will evaluate the new product less positively,

and this difference is smaller when the firm adopts brand extension than when it adopts either sub-brand or new brand.

## METHOD

Pretests were conducted to select the appropriate stimuli and to check the manipulation of treatments. We chose Nokia as the parent brand. MP3 player and facial cleanser were chosen as high and low levels of fit product categories. A 2 (high and low consumer innovativeness)  $\times$  2 (high and low levels of perceived fit)  $\times$  3 (brand extension, sub-brand, and new brand strategies) mixed design was adopted. Only the branding strategy was a within-subject factor.

## RESULT

### Branding Strategies and Levels of Perceived fit

*High perceived fit.* The new product evaluation under brand extension is significantly larger than that under either sub-brand ( $M_{\text{extension}}=4.8$ ,  $M_{\text{sub.}}=4.5$ ;  $F(1,59)=24.3$ ,  $p < .001$ ) or new brand ( $M_{\text{new.}}=3.3$ ;  $F(1,59)=260.9$ ,  $p < .001$ ). The evaluation under sub-brand is significantly greater than that under new brand ( $F(1,59)=196.7$ ,  $p < .001$ ). Hence, H1a is supported.

*Low perceived fit.* The new product evaluation under sub-brand is significantly higher than that under brand extension ( $M_{\text{extension}}=2.0$ ,  $M_{\text{sub.}}=2.5$ ;  $F(1,59)=31.9$ ,  $p < .001$ ). The evaluation under new brand is significantly higher than that under either brand extension ( $M_{\text{new.}}=3.6$ ;  $F(1,59)=590.7$ ,  $p < .001$ ) or sub-brand ( $F(1,59)=211.3$ ,  $p < .001$ ). Hence, H1b is supported.

### Consumer Innovativeness, Branding Strategies, and Levels of Perceived fit

*High perceived fit.* The evaluation difference between consumers with high and low innovativeness is significantly larger under new brand than that under brand extension ( $M_{\text{high inno. and new.}}=3.68$ ,  $M_{\text{low inno. and new.}}=2.88$ ,  $M_{\text{high inno. and extension}}=4.92$ ,  $M_{\text{low inno. and extension}}=4.67$ ;  $F(1,58)=10.0$ ,  $p < .01$ ), and than that under sub-brand ( $M_{\text{high inno and sub.}}=4.65$ ,  $M_{\text{low inno. and sub.}}=4.41$ ;  $F(1,58)=11.3$ ,  $p < .001$ ). Hence, compared with consumers with low innovativeness, consumers with high innovativeness evaluate the new product more positively, and this difference is bigger under new brand (weaker situation) than under either brand extension or sub-brand (stronger situations). H2a is supported.

*Low perceived fit.* The evaluation difference between consumers with high and low



innovativeness is significantly smaller under brand extension than that under sub-brand ( $M_{\text{high inno. and extension.}}=2.20$ ,  $M_{\text{low inno. and extension.}}=1.78$ ,  $M_{\text{high inno. and sub.}}=2.83$ ,  $M_{\text{low inno. and sub.}}=2.01$ ;  $F(1,58)=6.75$ ,  $p<.01$ ), and than that under new brand ( $M_{\text{high inno. and new.}}=3.91$ ,  $M_{\text{low inno. and new.}}=3.21$ ;  $F(1,58)=4.73$ ,  $p<.05$ ). Hence, compared with consumers with low innovativeness, consumers with high innovativeness evaluate the new product less positively, and this difference is smaller under brand extension (stronger situation) than under either brand extension or sub-brand (weaker situations). H2b is supported.

## DISCUSSION AND CONCLUSION

As predicted, the effect of consumer innovativeness on new product evaluation does have boundary under stronger situations proposed by the theory of situational strength. Compared with weaker situations, stronger situations (indicating clear consequences) formed by different branding strategies and levels of perceived fit can constrain the advantages of consumer innovativeness over new product. This study has the following contributions to consumer behavior and new product development fields. First, the theory of situational strengths is used to explain the inconsistent results in literatures concerning the effects of consumer innovativeness on attitudes or behaviors. Innovativeness matters for new products with a new brand name because the situational strengths are weak (e.g., Klink and Athaide 2010); it does not matter for those with an extended brand name because the situational strengths are strong (e.g., Martínez and Pina 2010; Vlöckner and Sattler 2006). Second, we suggest that innovative consumers are not always venturesome toward the new products in strong situations. This corresponds with Rogers (2003)'s statement that sometimes consumers are rational and not driven by their risk-taking propensity. We further indicate that strong situations may explain why this risk-taking propensity is attenuated. When deciding on the new products, product managers should hold the principle of situational strength in mind—whether their new product decisions construct a strong situation that makes targeting innovators less effectively.

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中文部分:

王永昇(2010)。〈品牌策略、產品契合度與消費者創新性對新產品評價影響〉。政治大學企業管理研究所碩士論文。

### 計畫成果自評

本研究針對企業發展品牌組合時，常需決定究竟應該以何種命名策略為宜，而針對與原品牌有不同契合度的新產品，此種策略又應如何與契合度搭配方有最好的新產品評價來做探討。同時，也探討因為消費者創新程度有所不同，此種差異是否又為消費者的創新性所調節？在學理上，過去的研究指出對於契合度較低的延伸產品，創新性較高的消費者，相對於低創新者，有較佳的評價。過去之研究又指出，消費者創新性對於其在新產品的評價上之影響以在產品延伸策略時效果較低，而在新品牌策略時效果較強，然而針對產品契合度與品牌策略的交互作用之研究則較少被探討，而創新性的影響在上述二因素不同搭配時是否影響有別，亦未被探討。本研究將此問題予以釐清。特別應用心理學界所闡釋的「情境強度」理論來探討創新性的解釋力之差異，發現強情境相較於弱情境而言會減弱消費者創新性對新產品評價的影響。綜言之，本研究採用一個頗有解釋力的新角度來探討品牌組合決策一項頗重要的問題，且過去對於品牌組合的研究偏重於品牌延伸策略或是新品牌策略，較少同時比較品牌延伸策略、副品牌策略(sub-brand)及新品牌策略之效果。以上的發現具有學術期刊發表的潛在價值。

研究的結果對於廠商的品牌組合發展與命名策略有參考之價值。當公司欲進行較低的契合度之新產品研發，應選用適當的新產品命名策略，且應考量到如何進行市場區隔方有最大的效果。

此外，本計畫上有一部份的議題是有關在網路上的品牌延伸之議題之探討，在此計畫中亦有些進展，特別結合了線上品牌社群的角度，得到一些研究成果，正在撰稿中，亦有投稿學術期刊的潛能。

本研究進行過程中，訓練大學生、碩士生以及博士生參與研究，引發他們對於該項主題的興趣，並提升了其相關的知識水準與研究能力。亦可為本研究的另一項價值創造—教育與人才的發展。

# 國科會補助專題研究計畫項下出席國際學術會議心得報告

日期：100年7月22日

計畫編號	NSC -99-2410 -H-004-109		
計畫名稱	品牌組合策略對於消費者之品牌延伸評價之影響		
出國人員姓名	張愛華	服務機構及職稱	政治大學企業學系 副教授
會議時間	100年7月6日至 100年7月8日	會議地點	韓國首爾
會議名稱	(中文) 第9屆消費者與家庭經濟雙年會議 (英文) The 9 <sup>th</sup> Biennial Conference of the Asian Consumer and Family Economics Association		
發表論文題目	(中文) 產品相似性、品牌策略與資訊可及性對於消費者處理家庭品牌資訊之模式的影響 (英文) The Influence of Product Similarity, Branding Strategy, and Information Accessibility on the Information Processing Mode of Family Brand		

## 一、參加會議經過

本次Asian Consumer and Family Economics Conference由韓國首爾大學的Department of Consumer Science 於首爾大學的校園內舉辦。本次會議出席發表論文的學者約有兩百多位，來自於太平洋兩岸的七個國家：美國、加拿大、日本、韓國、台灣、中國與馬來西亞，共有約百篇論文發表。本人發表的論文在Concurrent Session V-A: Technology場次發表。

## 二、與會心得

在研討會中，每位發表論文的學者以15分鐘簡潔介紹自己的研究內容，後續5分鐘由現在聆聽的學者提出問題討論。本人發表論文結束後，有許多與會學者提供意見與本人討論，並在會後討論未來合作的可能性。在此次研討會的過程中，發現各國對於消費者之權益保護愈來愈重視，如美國設立消費者保護局FTC's Bureau of Consumer Protection，而韓國的Korean Consumer Agency 雖是一個民間非營利組織，卻是十分地活躍，且是由學術界(如：韓國大學的Consumer Science Department)為主導，與政府、企業對話，協助消費者得到更大的福祉。且亦透過參與聯合國或G20的會議舉辦，影響文明世界的思潮。相對地，我國的消費者保護機構力量顯得較單薄，關心的層面亦較狹窄，日後台灣學術界應該有更多的消費者關懷研究和政策推動。

## 三、考察參觀活動

主辦單位在研討會結束後舉辦了文創觀光一日遊的活動，係自由參加。藉由此一活動得以觀察到韓國的影劇(如：冬季戀歌)為主的觀光旅遊景點塑造及歌舞藝術的文化行銷。此外，參觀李文博總統擔任市長時期整建的青溪圳親水公園，該地已成為當地人民喜愛的休閒場所，同時也是觀光景點之一，十分地成功。

#### 四、建議

由於亞洲地區的學者近年來積極參與國際性的學術交流活動，因此，我國自不應當在此領域中缺席，透過國科會計畫補助的機會，學者得以出國參與國際研討會，不但得以精進知識，人脈亦有機會拓展，因此收穫良多，感謝國科會的補助。

#### 五、攜回資料名稱及內容

1. 會議議程
2. 會議論文集
3. 機構簡介小冊: Korea Consumer Agency

#### 六、其他

無

# 國科會補助計畫衍生研發成果推廣資料表

日期:2011/10/25

國科會補助計畫	計畫名稱: 品牌組合策略對於消費者之品牌延伸評價之影響
	計畫主持人: 張愛華
	計畫編號: 99-2410-H-004-109- 學門領域: 作業研究/數量方法
無研發成果推廣資料	

99 年度專題研究計畫研究成果彙整表

計畫主持人：張愛華		計畫編號：99-2410-H-004-109-				計畫名稱：品牌組合策略對於消費者之品牌延伸評價之影響	
成果項目		量化			單位	備註（質化說明：如數個計畫共同成果、成果列為該期刊之封面故事...等）	
		實際已達成數（被接受或已發表）	預期總達成數（含實際已達成數）	本計畫實際貢獻百分比			
國內	論文著作	期刊論文	0	0	100%	篇	
		研究報告/技術報告	0	0	100%		
		研討會論文	0	0	100%		
		專書	0	0	100%		
	專利	申請中件數	0	0	100%	件	
		已獲得件數	0	0	100%		
	技術移轉	件數	0	0	100%	件	
		權利金	0	0	100%	千元	
	參與計畫人力（本國籍）	碩士生	0	1	100%	人次	
		博士生	0	2	100%		
博士後研究員		0	0	100%			
專任助理		0	0	100%			
國外	論文著作	期刊論文	0	2	100%	篇	研究成果正在撰稿中。
		研究報告/技術報告	0	0	100%		
		研討會論文	2	0	100%		
		專書	0	0	100%		章/本
	專利	申請中件數	0	0	100%	件	
		已獲得件數	0	0	100%		
	技術移轉	件數	0	0	100%	件	
		權利金	0	0	100%	千元	
	參與計畫人力（外國籍）	碩士生	0	0	100%	人次	
		博士生	0	0	100%		
博士後研究員		0	0	100%			
專任助理		0	0	100%			

<p>其他成果 (無法以量化表達之成果如辦理學術活動、獲得獎項、重要國際合作、研究成果國際影響力及其他協助產業技術發展之具體效益事項等，請以文字敘述填列。)</p>	<p>無</p>
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	成果項目	量化	名稱或內容性質簡述
科 教 處 計 畫 加 填 項 目	測驗工具(含質性與量性)	0	
	課程/模組	0	
	電腦及網路系統或工具	0	
	教材	0	
	舉辦之活動/競賽	0	
	研討會/工作坊	0	
	電子報、網站	0	
	計畫成果推廣之參與(閱聽)人數	0	



# 國科會補助專題研究計畫成果報告自評表

請就研究內容與原計畫相符程度、達成預期目標情況、研究成果之學術或應用價值（簡要敘述成果所代表之意義、價值、影響或進一步發展之可能性）、是否適合在學術期刊發表或申請專利、主要發現或其他有關價值等，作一綜合評估。

## 1. 請就研究內容與原計畫相符程度、達成預期目標情況作一綜合評估

達成目標

未達成目標（請說明，以 100 字為限）

實驗失敗

因故實驗中斷

其他原因

說明：

## 2. 研究成果在學術期刊發表或申請專利等情形：

論文： 已發表  未發表之文稿  撰寫中  無

專利： 已獲得  申請中  無

技轉： 已技轉  洽談中  無

其他：（以 100 字為限）

## 3. 請依學術成就、技術創新、社會影響等方面，評估研究成果之學術或應用價值（簡要敘述成果所代表之意義、價值、影響或進一步發展之可能性）（以 500 字為限）

本本研究針對企業發展品牌組合時，常需決定究竟應該以何種命名策略為宜，而針對與原品牌有不同契合度的新產品，此種策略又應如何與契合度搭配方有最好的新產品評價來做探討。同時，也探討因為消費者創新程度有所不同，此種差異是否又為消費者的創新性所調節？在學理上，過去的研究指出對於契合度較低的延伸產品，創新性較高的消費者，相對於低創新者，有較佳的評價。過去之研究又指出，消費者創新性對於其在新產品的評價上之影響以在產品延伸策略時效果較低，而在新品牌策略時效果較強，然而針對產品契合度與品牌策略的交互作用之研究則較少被探討，而創新性的影響在上述二因素不同搭配時是否影響有別，亦未被探討。本研究將此問題予以釐清。特別應用心理學界所闡釋的「情境強度」理論來探討創新性的解釋力之差異，發現強情境相較於弱情境而言會減弱消費者創新性對新產品評價的影響。綜言之，本研究採用一個頗有解釋力的新角度來探討品牌組合法策一項頗重要的問題，且過去對於品牌組合的研究偏重於品牌延伸策略或是新品牌策略，較少同時比較品牌延伸策略、副品牌策略(sub-brand)及新品牌策略之效果。以上的發現具有學術期刊發表的潛在價值。

研究的結果對於廠商的品牌組合發展與命名策略有參考之價值。當公司欲進行較低的契合度之新產品研發，應選用適當的新產品命名策略，且應考量到如何進行市場區隔方有最大的效果。

此外，本計畫上有一部份的議題是有關在網路上的品牌延伸之議題之探討，在此計畫中亦有些進展，特別結合了線上品牌社群的角度，得到一些研究成果，正在撰稿中，亦有投稿

學術期刊的潛能。

本研究進行過程中，訓練大學生、碩士生以及博士生參與研究，引發他們對於該項主題的興趣，並提升了其相關的知識水準與研究能力。亦可為本研究的另一項價值創造—教育與人才的發展。