Schmidt, Holger J.; Steenkamp, Pieter

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ORIGINAL ARTICLE

Beware, an underdog may bite: literature review and brand management framework in the context of underdog brands

Holger J. Schmidt[1] · **Pieter Steenkamp**[2]

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Abstract

An underdog brand is a brand with humble resources that competes with passion and determination against competitors that dominate a market. Numerous anecdotal examples and a few research articles of underdog brands exist, yet the understanding of what an underdog brand is and how brands can use the underdog effect is still limited. Considering the relevance of underdog brand management for practice, the purpose of our article is to distill the components of the concepts "underdog brand" and "the underdog effect" and to propose a conceptual framework to guide underdog brand management. To achieve this goal, we undertook a systematic review of the extant literature that resulted in (1) a clear and demarking definition of the term underdog brand, (2) an analysis of the usefulness of the underdog effect and (3) a reference frame we termed "the underdog brand management framework". By doing so, we helped to overcome the research gap in the field of underdog brand management. To validate our findings, we tested the framework against a case study of a successful underdog brand. Our analysis resulted in a robust model that could inspire and guide practitioners who are in charge of underdog brands.

Keywords Underdog brand · Underdog effect · Brand management · Brand biography · Literature review · Case study research

Introduction

It's not the size of the dog in the fight that matters; it's the size of the fight in the dog (Fishman 2014, 28).

The term "underdog" is often used to refer to disadvantaged individuals or groups who are not likely to win (Vandello et al. 2007; Kim et al. 2008) but it is not as old as it may seem. It first appeared in the nineteenth century when dog fights were becoming popular. In accordance with canine behaviour, the losing dog would usually lie down on his back as a sign of submission, while the winning dog, also called the "top dog", would stand over him (Goldschmied and Vandello 2012). Referring to this natural behaviour, a dog which attracted higher odds from the bookmakers, and therefore was expected to lose by the majority of spectators, was called in advance the underdog. But even if the word underdog appeared relatively late, the myth of the underrated figure fighting a superior opponent has over centuries inspired the imagination of people across cultures and geographical boundaries. The passionate battle of the severely outnumbered Greek ships against the dominant fleet of the Persians at Salamis; the clever fighting tactic of the timid David against the mighty Goliath portrayed in the Bible; Rocky Balboa preparing for his fight in an old-fashioned way on his own at a remote farmhouse, but defeating his scientifically coached Russian opponent in the movie *Rocky IV*; finally, the inspiring season of Leicester City which ended with the premier league championship in 2016 are just some examples of the emotionality with which stories have been presented about the apparently hopeless, but finally successful struggle of disadvantaged people or organisations against their much better-equipped opponents. It is those who "faced daunting odds, were given little hope or were expected to fail" (Vandello et al. 2007, 1603) who perhaps have inspired humankind the most. The underdog has become a kind of brain script or archetype of our times (Woodside et al. 2008; Wertime 2002; Jung 2014), and many of us feel emotionally connected with the outsider. This is what is called the underdog effect (Paharia

✉ Holger J. Schmidt
hjschmidt@hs-koblenz.de

[1] Faculty of Business Science, Koblenz University of Applied Sciences, Konrad-Zuse-Strasse 1, 56075 Koblenz, Germany

[2] Faculty of Business and Management Sciences (Marketing Department), Cape Peninsula University of Technology, District Six Campus, c/o Hanover and Tennant Streets, District Six, Cape Town, South Africa

et al. 2011), an effect which seems to be universal (Kim et al. 2008; Sidali et al. 2015; Sidali and Hemmerling 2014).

In management literature, numerous anecdotal examples abound of brands that began as underdogs and became successful. These include such prominent cases as the struggle of Avis against market leader Hertz in the sixties, Pepsi's challenging of Coca-Cola in the seventies and eighties and Apple's iconic rise to dominance in the nineties (Morgan 2009). Yet, understanding of what an underdog brand is and how brands can use the underdog effect is still limited. Even though the underdog phenomenon has been written about and proposed as a viable strategy to compete against leader brands (e.g., Kao 2015), to date a comprehensive and scientific framework to guide the brand management process to position a brand as an underdog has not been attempted, at least to our knowledge. Considering that most brands are not market leaders, the management of underdog brands is a very relevant topic for practice. Therefore, the article at hand strives to fill this research gap and proposes interesting insights for numerous smaller and underprivileged brands.

After discussing the rationale of our research in more detail, we first present a structured literature review that allows us to distill the most widespread definitions of the concept of an underdog brand and to propose a clear delineation of the concept. The clarity that is provided in this regard differentiates underdog brands from other types of brands, and thus focuses brand management and research regarding this topic. Following this, we provide a comprehensive review of sources of the positive underdog effect. This might encourage brand researchers to include the underdog effect in brand management theories; further, brand practitioners can take advantage of the underdog effect by tapping into consumers' affection for underdogs. The literature review also uncovers themes which become the building blocks of a proposed conceptual underdog brand management framework. These themes are sequenced and presented in the discussion section of this article. The framework offers practitioners guidance about how to manage an underdog brand. Finally, we strive to validate the framework by assessing an underdog brand and comparing the insights of the case with the results of our literature-based analysis. This is the first step, and it is hoped that other researchers will follow suit and apply the framework to case studies in different contexts. Finally, we discuss further implications of our framework for research and practice.

Rationale of the research

It has long been argued that brands should not all be managed equally: brands in different contexts face different challenges (Ind and Schmidt 2019), and brand management strategies and practices must be situationally adapted to be successful. Consequently, within the brand management literature, various conceptualisations of brand types are encountered that refer, among others, to the industry a brand belongs to (e.g., B-to-B-brands vs. consumer brands vs. service brand), a brand's role (e.g., pioneer brands vs. me-too-brands), size (e.g., corporate brands vs. start-up-brands) or success (e.g., leading brands vs. follower brands) within a given market, and has developed different success factor models for them. An underdog brand is one brand type; the term, which we will later discuss in more detail, is usually associated with a brand that has access to limited resources and that competes with passion and determination against market-dominant competitors (Paharia et al. 2011). Unfortunately, as argued in the previous section, even though underdog brands have been overtly discussed in management literature, there is still no clear view on what an underdog brand is and how it should be managed. This is highly regrettable for various reasons: first, knowledge about underdog brands often results from anecdotal examples and from case studies which cannot be generalised to underdog brands in general. Therefore, practitioners are still in need of a corresponding framework that could guide and inspire their management of underdog brands. Second, terms like challenger brand, follower brand, cool brand and our brand type in focus, underdog brand, are often confused, which leads to many publications that create a dense fog around the various concepts. Without a clear definition of the term "underdog brand", clarity cannot be achieved. Third, being an underdog brand and taking advantage of the underdog effect are two different issues, which are often forgotten. A brand may use the underdog effect without being an underdog, and not all underdogs actively use their brand biography to exploit the underdog effect. This needs further attention.

Methodology

To identify the most relevant literature, we conducted a systematic literature review (Kunz et al. 2020; Tranfield et al. 2003). Such an analysis is considered the most appropriate method to survey existing research and to identify research gaps (Fink 2019). It consists of three stages, namely planning, execution and reporting (Fink 2019; Tranfield et al. 2003).

In the planning phase, we specified the research questions which we formulated as follows: how are underdog brands defined in past and current literature? What effect can a brand expect by using its underdog status or heritage? And, most important: how can brands use the underdog effect to strengthen brand image and reputation? Following this, we defined the relevant keywords and decided to search for the keywords "underdog" AND ("brand" OR "marketing" OR "consumer behavior"). Then, we agreed on the relevant

databases and established access to ProQuest, Business Source Premier, Academic Search Premier (EBSCOhost) and Emerald. Last but not least, we agreed on all details that we considered important for the execution phase, such as how to save files and how to keep track of our work.

During the execution phase, which was completed in early 2020, as a first step, we scanned the relevant databases using the defined keywords, taking into account different modes of spelling the term "behavior" ("behaviour" in UK English). Articles identified by the search but written in a language other than English were excluded. This procedure resulted in 506 articles. Then, the abstracts of all identified articles were read, and those articles were excluded that did not fit our research purposes or that were duplicated across the different databases. A total of 53 articles remained after this process; as a second step, we read the complete articles. Again, off-topic articles were excluded, but if we found additional promising articles that were referenced in those identified by the database search, we added them to the list of articles to be analysed. The final list consisted of 44 articles which, with few exceptions, were all published in renowned journals. As a third step, we analysed all remaining articles and structured their content within a table with the following columns: Author; Journal; Year; WHAT is an underdog brand? WHAT is the underdog effect? WHY do consumers support underdogs? and HOW can the effect be managed? The resulting table can be viewed in the "Appendix".

Considering the reporting phase, we decided not to follow the way a systematic literature review is usually done. Considering the confusing and sometimes contradictory definitions and recommendations in the field of underdog brands, we agreed not to report first about existing literature and then to discuss conclusions, but instead to develop our conclusions while describing the results of the analysis. Therefore, in our reporting in the following section, and derived from the table which is displayed as "Appendix", comprehensive definitions of the terms underdog brand and underdog effect are distilled as well as a conceptual framework to guide underdog brand management is developed. We thereby understand brands as "engagement entities co-created with others" (Veloutsou and Guzman 2017, 3) and brand management as the process that guides the strategic and operational development of brands.

In addition, we used a descriptive single case study (Hesse et al. 2020) of the underdog brand Fritz-Kola based in Hamburg, Germany, to start the process of validating the conceptual framework. We identified and developed the case based on multiple sources of information. An analysis of the case and how elements of the conceptual framework relate to the case are presented as Fig. 2 and Table 3. This informed our implications for theory and practice.

To sum up, the following Fig. 1 provides a comprehensive overview of our methodological approach (see Pahlevan-Sharif et al. (2019) for a similar flow chart).

Findings of the systematic literature review and discussion

Definition and demarcation of the term "Underdog Brand"

Various characteristics and definitions of underdogs and underdog brands were extracted from the systematic literature review and are summarised in Table 1.

The results show that underdog brands are described as smaller, less powerful and with fewer resources (Hoch and Deighton 1989; McGinnis and Gentry 2009; Sidali and Hemmerling 2014; Sidali et al. 2015; Anonymous 2014; Laybats and Tredinnick 2015); lesser known (Gnepa 1993); with less chance of success than the top dog (Baik and Shogren 1992; Wolburg 2003), but determined to succeed (Wolburg 2003; Paharia et al. 2011) despite the disadvantage (McGinnis and Gentry 2009; Keinan et al. 2010). In addition, underdog brands typically refer to their humble origins (Keinan et al. 2010; Kim et al. 2008). Based on the results, we define an underdog brand as a brand of humble origin and with limited resources that compete with passion and determination against at least one competitor that dominates a market. Ina Paarman's Kitchen, a focused food manufacturer from South Africa that started as a cookery school in their garage, or Fritz-Kola, a soft drink manufacturer from Germany that competes against industry giant Coca-Cola, can be considered as good examples of underdog brands.

To access the discriminant power of our proposed definition, in the following section we discuss the established terms challenger brands, follower brands, niche brands, pioneer brands and cool brands that at a first glance appear similar to underdog brands, and compare the concepts with our brand type in focus.[1]

Because both are not market leaders but compete passionately against them, the concepts of challenger and underdog brands seem very similar. De Chernatony and Cottam (2009) describe challenger brands as brands challenging marketing norms through radical ideas or innovative ways of organising their business. Morgan (2009), in his best-selling book *Eating the big fish*, defines a challenger brand drawing on three criteria: a state of market (not being the number

[1] The insights we generate in the remaining part of this sub-chapter to distinguish the term underdog brand from related terms are not necessarily based on literature from the systematic literature review, but also draw on complementary literature.

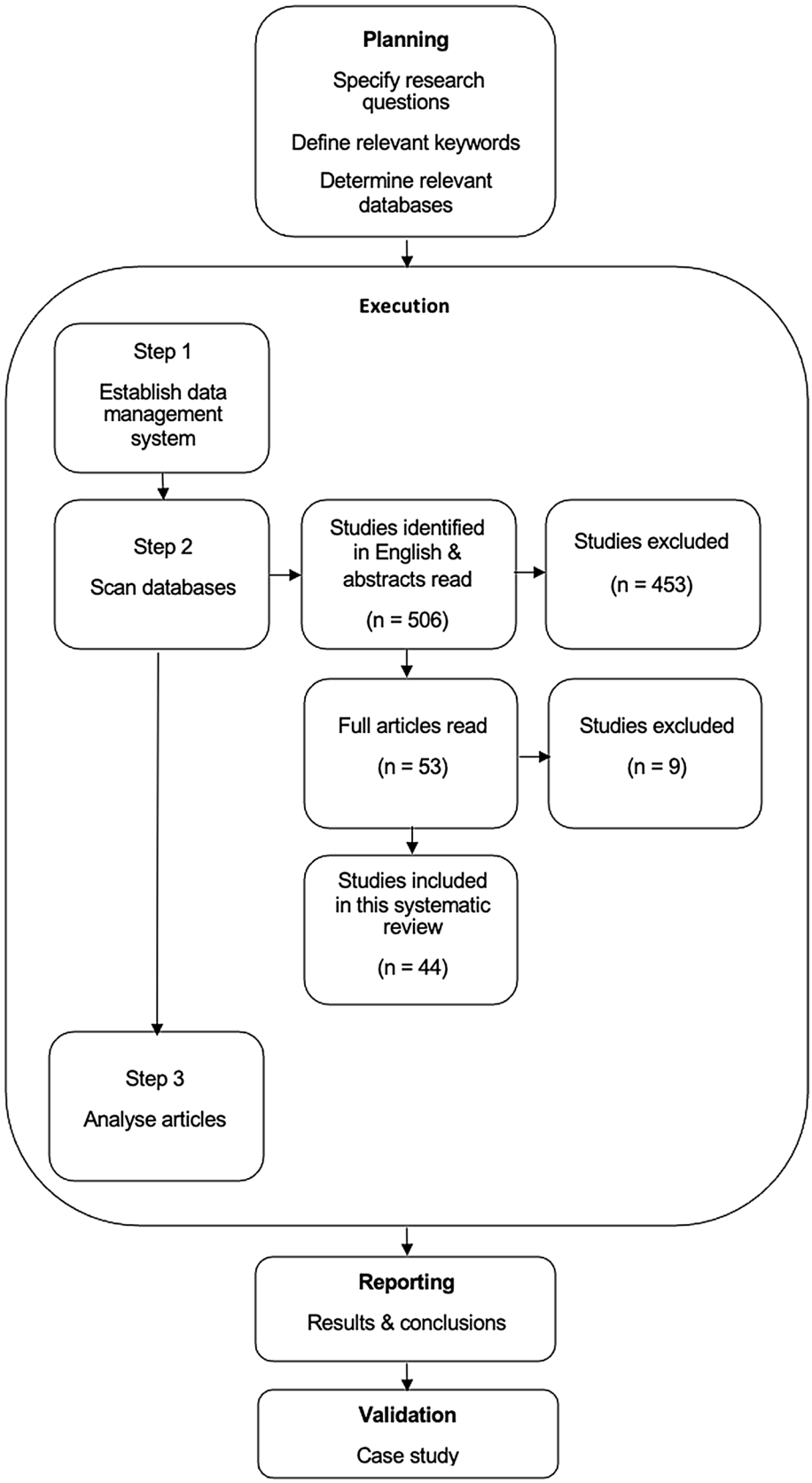

Fig. 1 Systematic literature review stages

Table 1 Dimensions of an underdog brand

Authors	Dimensions of underdogs and underdog brands
Ceci and Kain (1982)	Non-dominant brands
Hoch and Deighton (1989)	Weaker brands in terms of market share Smaller, less powerful brands with fewer resources
Baik and Shogren (1992)	Brands with a minor chance of success
Gnepa (1993)	Low market-share brands Lesser-known brands
Wolburg (2003)	Underdog brands are "small regional brands that struggle to compete against industry giants" and "fight to stay alive" (p.340)
Parsons (2005)	In a political context, the subjugated
Vandello et al. (2007)	Disadvantaged individuals or groups who are expected to lose An underdog brand is a competitor with low likelihood of success
Kim et al. (2008)	An underdog is a "loveable loser" (p. 2) Underdogs are people, animals or inanimate objects encountering difficulty competing against a better resourced opponent An underdog achieves success from modest origins
McGinnis and Gentry (2009)	A "non market-dominant entity" (p. 191) Brands that succeed despite disadvantage Mom-and-pop stores competing against huge discount stores All brands, excluding the limited number of market leaders or top dogs
Keinan et al. (2010)	Underdogs are scrappy A brand referring to its humble beginnings A brand that highlights its small size compared to the top dog A brand that is small and new A brand competing against "powerhouses" (p. 32) A brand with a small marketing budget
Paharia et al. (2011)	Underdog brands are of humble origins, had fewer resources and eventually succeeded due to their attributes of determination (a struggle) and passion
Staton et al. (2012)	A weak brand
Sidali and Hemmerling (2014) and Sidali et al. (2015)	Local unknown small-scale traditional specialties producers from humble beginnings and who struggle against stronger competitors
Anonymous (2014)	A small brand
Fishman (2014)	Has more limited budget than major competitors
Laybats and Tredinnick (2015)	Smaller organisation
Jun et al. (2015)	Disadvantaged, but persistent
Kao (2015)	Grows from a modest beginning. It struggles to overcome the odds to succeed with determination against well-resourced opposition
Angell et al. (2016)	Small company with less status than top dog
McGinnis et al. (2017)	"Small locally owned businesses" (p. 563) trying to survive against dominant competitors with concentrated power in a globalised world
McGinnis et al. (2019)	"Overcoming obstacles" (p. 419) and "the working man's voice" (p. 429)

one brand nor a niche player), a state of mind (following ambitions exceeding conventional marketing resources and being aware of this), and a rate of success. He separates the concept of the challenger brand from what he calls "establishment brand" (p. 26). Underdog brands, on the contrary, can and often will be niche players and are not necessarily successful.

Roy and Sarkar (2015) compare established brands with follower brands and describe the latter as relatively weaker or less established brands. Beverland et al. (2010) classify brands that respond to market needs with incremental innovations as follower brands. They argue that whereas so-called category leader brands focus on radical innovations stipulated by customers, follower brands only provide incremental improvements to existing products. Follower brands and underdog brands have in common that both are less established than leader brands. A leader brand is, within a product category, the preferred brand by consumers, over all other brands (Roehm and Roehm 2004). But underdog brands, as our ongoing analysis will show, can be very innovative: innovation can even be the core of their business model.

Niche marketing, as a basic marketing strategy, is often described in marketing strategy literature under the headline

Table 2 Underdog brands and their demarcation to similar concepts

Concept	Definition	In relation to underdog brand
Underdog brand	A brand of humble origin and with limited resources that competes with passion and determination against at least one competitor that dominates a market	–
Challenger brand	A brand that is neither a dominant brand nor a niche player that intentionally follows ambitions exceeding conventional marketing resources, and that is successful (Morgan 2009)	Underdog brands can be niche players and can be unsuccessful
Follower brand	Relatively weaker or less established brands with less innovative power (Roy and Sarkar 2015; Beverland et al. 2010)	Underdog brands can be very innovative
Niche brand	A brand that focuses on meeting a specific customer segment's needs (Koschmann 2019) in rather small, less competitive markets in order to avoid fierce competition in more competitive markets	Underdog brands actively seek competition with a dominant market player
Pioneer brand	A brand that was first in its market, perceived as being prototypical within the category (Lowe and Alpert 2010)	Underdog brands are rarely first in their markets
Cool brand	Brands that are perceived as extraordinary/useful, with high status, that is aesthetically appealing, rebellious, original, authentic, subcultural, popular, iconic and energetic, and that score high on a corresponding scale (Warren et al. 2019)	Underdog brands, unlike cool brands, are never market leaders

of segmentation (Toften and Hammervoll 2013). Dalgic and Leeuw (1994) consider a niche to be a small market consisting of an individual customer or a small group of customers with similar characteristics or needs. Niche marketing has been traditionally portrayed as a method to meet customer needs through tailoring goods and services for small markets (Thompson et al. 2010) or for markets that are not served by competing products (Dalgic and Leeuw 1994). A niche brand is therefore one that focuses on meeting a specific customer segment's needs (Koschmann 2019) in rather small, less competitive markets, in order to avoid the fierce competition in more competitive markets. This is what differentiates it from an underdog brand: the former strives to avoid competition; the latter actively seeks competition—even in markets that already seem occupied.

A pioneer brand is a brand that was first in its market and which is perceived as being prototypical within the category by consumers who often base their reference price and value judgments upon it (Lowe and Alpert 2010). The pioneer brand often frames a subject's perceptions of the product category and becomes the category prototype (Carpenter and Nakamoto 1988) because of its novel and attention-drawing features (Alpert and Kamins 1995). Underdog brands often offer novel features as well, but they are rarely the first in its market.

Warren et al. (2019), while developing a scale for brand coolness, argue that cool brands can be divided into two categories: the niche cool and the mass cool. Niche cool, that only appeals to a small group of insiders, can be characterised as original, authentic, rebellious, exceptional and aesthetically pleasing. When it becomes more popular and iconic over time, but less autonomous, it becomes mass cool. Obviously, many underdog brands are cool brands, but Warren et al. (2019) also name market leaders like Apple, Red Bull, GoPro or Nike as examples of cool brands that cannot be considered to be underdog brands.

Table 2 offers an overview of the concepts discussed. Based on what has been said, underdog brands are clearly distinct from other related concepts.

The underdog effect

It has been widely observed that people gravitate towards disadvantaged competitor that will probably not win (Vandello et al. 2007). The effect that people tend to support the underdog has been described in many areas of society, among them sport, politics and business. We, therefore, argue that it is important to consider the seemingly broad application of the underdog effect as a brand management construct not only for business, but also in sport and politics.

In the area of sport, this so-called underdog effect has seen a strong interest by researchers. Spectators of a sports competition, if they are not passionate fans of one of the competing teams or athletes, are usually in favour of the underdog instead of being neutral (Vandello et al. 2007). Since the underdog is expected to lose, its supporters do not feel bad if this actually happens, but they can ride high on emotions if the supported underdog wins against all odds. Such an unexpected victory also raises the self-esteem of the supporters. Therefore, by supporting the underdog, people act rationally: they implicitly anticipate their expected emotional reactions, and so it is better to sympathise with the underdog so that they can only win in emotional terms,

because a loss is written off in advance, while a victory is an unexpected bonus.

Two interesting studies that analyse the underdog phenomenon and show the effects described above are those of Frazier and Snyder (1991) and Vandello et al. (2007). Frazier and Snyder (1991) asked approximately 100 students to choose to support either Team A or B, with Team A being praised as the clearly superior one. Eighty-one per cent of the participating students favoured Team B. But as Team B managed to win the first three rounds out of seven possible encounters, some 50 per cent of those who first positively supported the potential underdog changed their minds and sympathised with the new outsider, Team A. Vandello et al. (2007) showed that people perceive a basketball team as being more dedicated when their players have been described as less talented, and with lower potential. They also showed that support for an athlete increases during an undecided but ongoing competition when the athlete has been portrayed in advance as inferior.

In the context of politics, branding has been underresearched even though it is becoming common practice. The question has been raised "whether ideas about branding taken from business studies have utility in the electoral/political arena" (Marsh and Fawcett 2011, 519). In terms of the underdog effect, this seems to be the case as it was recorded as far back as Simon (1954), Ceci and Kain (1982) and Parsons (2005) that people vote for a candidate who is less likely to succeed. Voters sympathise with the losing candidate (Lee 2011). An experiment by Vandello et al. (2007) revealed that sympathy for one of two opposing parties can easily be manipulated. Discussing the conflict in the Middle East between Israel and Palestine, they note that support increases as soon as one side is presented as being disadvantaged compared to the opposing force. Simon (1954) defines the underdog effect, in the context of political elections, as the opposite of the bandwagon effect. The bandwagon effect claims that people rather vote for a person with a high probability of winning. The underdog effect predicts that people tend to vote for the candidates who are supposedly losing or falling behind (Baum and Just 2009). Goldschmied and Vandello (2009) argue that, for political candidates, being labelled an underdog has a strategic advantage. Politicians who have relied on the underdog effect while running for office and applied methods to position themselves as the underdog against their competitors include Barack Obama and Donald Trump (Harfoush 2009).

In marketing literature, it has often been argued that, for various reasons, consumers prefer market leaders and famous brands over less established competitors (Steenkamp et al. 2003), and therefore the underdog effect has received far less attention than other topics. Nevertheless, there are formative studies reporting on conditions that activate the underdog effect, which includes morals, product type, transgression type, envy, affection-orientation and prosocial orientation. Holt (1998, 2002) and Tian and McKenzie (2001) argue that some consumers prefer underdog brands for moral reasons. By buying underdog brands, those consumers act as nonconformists and position themselves against capitalism and consumerism. Wolburg (2003) uses the example of Double-Cola to show that underdog brands give their customers the feeling that they could indeed "own" the brand. In another study, Li and Zhao (2018) tested the moderation effect of product type (functional or hedonic) on consumer brand identification with brand stories. They found that consumer brand identification was higher for hedonic products with underdog brand stories. A possible reason the authors advance for this is that consumers use hedonic products to express their own underdog identity and therefore identify with this type of product's underdog brand story. The study shows that the underdog effect has limitations that are based on product type.

In relation to failure, Kim et al. (2019) find that consumers display the identity-based underdog effect by being more forgiving of underdog non-relational failures, like product or service outcome and non-human failures, than of top dogs. There is no difference, however, in consumers' attitude for relational failures, or human failures. Their study contributes another boundary condition (the transgression type) to what Li and Zhao (2018) report (the product type). Another study reports that consumers with malicious envy are more likely to support underdogs than top dogs and consumers with benign envy do the opposite (Kao 2019). On the opposite end of the spectrum, Kao and Wu (2019) find that highly affection-oriented bank clients, those who feel emotions intently, tend to support underdog brands and this support is not influenced by a high or low cognitive load. Consumers with a prosocial value orientation, with a philosophy of "maximisation of both own and others' outcomes (i.e. cooperation) and minimisation of absolute differences between own and others' outcomes (i.e. equality)", are more likely to purchase brands positioned as underdog brands (Han and Kim 2020, 256).

Kao (2015), Stock and Gierl (2015) and Paharia et al. (2011) discuss how companies like Apple, Nike or Diesel use their underdog brand biographies to point out how their founders started from a humble position but overcame obstacles, and Paharia et al. (2011) show that this resonates the strongest with consumers who see themselves as a kind of underdog too (also see McGinnis and Gentry 2009). A company referring to its past or present underdog position usually strives to reassure consumers that they will have an extraordinary product or service experience, since staff are more motivated. An often-cited example of this is the campaign of the rental car company Avis, which debuted in 1962 (Shirai 2017). The advertising slogan "We are number two. So, we try harder" consciously communicates the

subordinate position to Hertz, but at the same time emphasises how much Avis strives to excel the customers' needs. The campaign was very successful (Stevenson 2013).

In addition, the findings of Kim et al. (2019, 36) "clearly imply that people think of underdog brands as anthropomorphised [personified] close friends whom they are willing to help, support and feel close to, rather than as just an inferior company with few resources".

Based on our findings, we define the underdog effect as the consumer's affection for and support of underdog brands or of brands that build on their underdog heritage. Though this effect is generally positive, the literature analysis also showed that it is not advisable for all underdogs to actively count on the underdog effect: For example, Li and Zhao (2018) found higher consumer brand identification with top dog brand stories of functional products. They suggest that when quality, rather than self-indulgence, is paramount, consumers prefer top dog brands because they are perceived as more able to deliver on this dimension. Other boundary conditions include benign envy (Kao 2019), low affection orientation (Kao and Wu 2019) and individualistic value orientation (Han and Kim 2020). Under these conditions, underdog brands may deliberately adopt an underdog disassociation strategy.

Underdog dynamics

Underdog biography contributed to the growth of well-known brands identified in the literature review presented above, which includes Leicester City (sports); Barack Obama and Donald Trump (politics); Avis (car rental); Pepsi, Double-cola and Fritz-Kola (soft drinks); Sam Adams (beer) and Apple (technology). In addition, Tezer et al. (2020) identify Google (technology); TOMS (shoes and accessories); Fox Family Potato Chips (snacks); The North Face, Patagonia and REI (outdoor clothing and related products) as brands using underdog biography. Drawing on the definition of underdog brands presented in the previous section, it might be argued that a brand loses the underdog designation when it grows to a point where it possesses greater resources than competitors (Vandello et al. 2007), as is the case with the brands listed. However, more recent research suggests that consumers tend to continue to support brands that may not be underdogs anymore, but have an underdog brand biography (Paharia et al. 2011). This is supported by the argument that underdogs need to be positioned believably as an underdog brand in consumers' minds to develop an authentic underdog brand image (Angell et al. 2016). A well-established and successful brand can be viewed as an underdog due to its humble beginnings and lower-income target market (McGinnis and Gentry 2009). As evidence of this, based on qualitative interviews with fans of a celebrity brand, McGinnis et al. (2019) found that an underdog brand can retain its appeal despite achieving success and fame. Key to this is for supporters to understand the brand's authentic brand story. The study also found that transparency and approachability are fundamental for long-term sustainability of an authentic celebrity brand. The paper contributes to the concept of existential authenticity, meaning that the successful celebrity underdog brand was authentic holistically, beyond supporters only, as to its underdog status. Nevertheless, Jacobs (2015, 36) refers to "brandwidth" to sensitise for the extent to which larger brands can tell believable underdog stories.

Also, an underdog in one evoked set (consumer-determined group of brands) may be a top dog in another. The brands' market standing is relative to the brands in the evoked set. Related to this is Frito Lay's, for example, that positions its Stacy's pita chips as an underdog brand against its own top dog brands, Doritos and Fritos (Paharia et al. 2011). A smaller brand that was acquired by a larger brand could be positioned as a small or a leading brand because it is based on "consumers' perceptions of whether a brand is smaller, rather than the brand's true market position" (Paharia et al. 2014, 655; also see Anonymous 2014). Samuel Adams Brewery highlights its small size compared to the top dog even though it is bigger than most craft brewers (Keinan et al. 2010). And even dominant organisations like Apple are using the underdog narrative (Sidali and Hemmerling 2014).

Siemens et al. (2020) investigated the importance of authenticity in terms of continuing support for a successful underdog brand when the underdog brand is sold to a large organisation. They found that in such a situation the brand can retain consumer support if it is perceived as being authentic, but being bought by a major organisation, even if the owners retain control, still leads to a weakening of the underdog effect. The loss of authenticity, in the consumers' view, could be mitigated if the owners have sold due to the acquiring organisation's ability to provide increased benefit to employees and consumers, rather than a profit or efficiency motive.

Accordingly, the systematic review suggests that in order to exploit the underdog effect (as discussed in the previous section), the brand's biography may be the most important focus point. In line with this, Paharia et al. (2011, 776) discuss the fact that even huge and successful brands like Hewlett-Packard, Microsoft and Apple play the underdog role at least to some extent by profiling "the humble garages in which they began". The authors define a brand's biography as an "unfolding story that chronicles the brand's origins, life experiences and evolution over time in a selectively constructed story" (p.776). Therefore, not only underdogs can benefit from the underdog effect, but also leading brands that are able to authentically communicate their underdog brand biography. Sam Adams, which is positioned as an "underdog

craft beer", but has a national footprint (Shin Legendre et al. 2018, 201), might be an excellent example of this.

Underdog brand management framework

During the literature review, themes emerged that could be arranged to guide the building of underdog brands. The themes are described below.

Philosophy

Consumers support underdogs because it is presumed that these brands work hard to achieve an outstanding result, but face challenges (Shirai 2017). In line with this is the observation that when participants considered the underdog to be exerting greater effort, it mediated liking. In other words, the successful outcome must be deserved (Vandello et al. 2007; McGinnis and Gentry 2009). People have the perception that the underdog brand needs support to persevere, provided that the underdog does not want to lose (Jun et al. 2015). Wolburg (2003), in his study of the soft drink industry, supports the idea of the importance of the underdog's fighting attitude and reports that the only strategy that seems successful for an underdog was head-to-head competition with the market leader. The insights from the literature just presented led us to call this theme 'Philosophy'.

Offering

Products and services of underdogs seem most successful if they are localised (Fishman 2014), personalised and customised (McGinnis et al. 2017) to the needs of the target market. Thereby, underdog brands can show their dedication to meet and exceed customer expectations and to provide alternatives to the well-known big players. Additionally, not relying on standardised products could be interpreted as the underdog's willingness to exert greater effort—something that we already identified as important for the development of the underdog effect. We summarised all the findings associated with this under the theme 'Offering'.

People

The importance of people (employees) is recognised (Contractor 2013), and they should deliver excellent buying experiences to encourage positive recommendations (Fishman 2014). Underdogs' employees should be hard-working and have an appreciative attitude (McGinnis et al. 2017). Stories about the people associated with the underdog can be included in the underdog biography to position the brand in consumers' minds (Angell et al. 2016). These findings suggest that the success of underdog brands is closely linked to the 'People' involved.

Target

It may be that people support underdogs because every person has been an underdog at some point in their lives. Consumers support underdog brands due to self-identification with underdogs (McGinnis and Gentry 2009; Paharia et al. 2011; Anonymous 2014; Jun et al. 2015; Kao 2015; McGinnis et al. 2017; Kim et al. 2008), and this underdog status strongly and positively influences their consumption (Paharia et al. 2011). For example, people with empathetic concerns support underdog brands (Jun et al. 2015). Also, targeting lower social-economic status consumers may be beneficial (Staton et al. 2012). In addition, direct consumers should be targeted and not those who purchase for others (Paharia et al. 2011). Underdog brands thus seem to address a special 'Target' group.

Position

An underdog positioning can have an alternative appeal (McGinnis and Gentry 2009) and should be communicated through brand biographies. Underdog biographies enhance consumer preference, improves purchase intention, actual purchase and loyalty (Paharia et al. 2011; Sidali and Hemmerling 2014; Sidali et al. 2015). The biographies should include the brand's humble beginnings, the disadvantages that the brand had to contend with as well as references to the passion and determination required (Paharia et al. 2011; Staton et al. 2012; Sidali and Hemmerling 2014; Sidali et al. 2015; Angell et al. 2016; McGinnis et al. 2017). In addition to underdog biographies, social media (Laybats and Tredinnick 2015) and traditional advertising (Jun et al. 2015) can also be used to 'Position' the underdog.

Similarly, Jun et al. (2015) support the notion that underdog brands should make their status salient. Physical evidence can be used to convey the underdog positioning (Fishman 2014). This builds the relationship between the underdog and the consumer. More recently it was found that the relationship is more complex and that it is important that the underdog should emphasise the top dog's size and threat. This is referred to as "framing the game effect" (Paharia et al. 2014, 647). In politics, Gnepa (1993) found that comparative advertising is more often used by underdog brands. This competitive framing speaks to a web of interrelated relationships that the consumer has with different brands. Consumers evaluate brands in relation to other brands they compete with. Underdog brands are entangled within the consumer's mind. Paharia et al. (2014) also report that it is better to refer to a nearby major competitor than to a geographically distant major competitor. Furthermore, it has been shown that underdog brands can benefit from brand association spillover (Dwane 2004) and perceived consumer risk could be reduced by indicating that the underdog is

being supported by other consumers. This could be achieved through third-party endorsements (Shirai 2017; Wang and Muehling 2012).

Underdog affection

Consumer underdog identification elicits positive feelings or an emotional response towards the brand (Anonymous 2014; Staton et al. 2012). In our framework, we call this 'Underdog affection': Underdog affection mediates antecedents to underdog support (McGinnis et al. 2017). In addition, there are factors that are not under the control of the underdog brand management team, but which may also add to underdog support. These include "concerns with justice and fairness [that] drive support for the disadvantaged" (Vandello et al. 2007, 1604). Consumers support underdogs because of "empathy, as a way to ensure the maintenance of equal opportunity in competition … to keep the little guy competing … while holding top dogs at bay, and as a way to provide personal inspiration … being anti-corporate" (McGinnis and Gentry 2009, 191, 198). Paharia et al. (2014, also see Anonymous 2014) describe such actions as purchase activism and explain:

> Consumers' [have] motivation to express their views and have an impact in the marketplace through their purchase choices. When a brand is presented in a competitive context, consumers consider not only each brand's attributes but also which brand they want to support and whether their own purchase choices can make a difference in the marketplace (Paharia et al. 2014, 647–648).

Underdog support

If the foundational themes are implemented properly and together with underdog affection, underdog brand management will hopefully lead to the ultimate aim which is 'Underdog support'. Small organisations, non-profit organisations and new brands (including smaller franchises; Fishman 2014) often find it difficult to compete and could do well to position themselves as underdog brands (Kao 2015; Kirmani et al. 2017). These smaller organisations may find it difficult to compete with the established competitors on competence or performance. Therefore, to position an underdog, brands should lead with emotional connections (passion, commitment, warmth, etc.) and follow with the rational aspects (performance, competence) (Angell et al. 2016). These underdog brands should communicate values of "morality, namely honest, organic, health, social consciousness, integrity and ethical behaviour" (Kirmani et al. 2017, 116). Consumers are prepared to pay a premium to support underdogs (McGinnis and Gentry 2009).

The seven themes derived from the literature and discussed in the previous paragraphs form the conceptual underdog brand management framework depicted in Fig. 2. The themes that are under the underdog brand's management's control are philosophy, offering, people, target and position. These build the underdog identity. Underdog affection and underdog support are not under the direct control of the managers of the underdog brand. They represent the underdog effect. Table 3 summarises the proposed themes of the underdog brand management framework.

Towards a validation of the framework: the case of Fritz-Kola

We employed between-method triangulation by analysing a single case study of an underdog brand while examining the same phenomenon. Methodological triangulation has been found to be beneficial in providing an enhanced understanding of a phenomenon (Bekhet and Zauszniewski 2012), and case study analysis has been used in literature before to assess if models developed on the basis of a literature analysis could serve as a point of reference for future research (e.g. Schmidt and Baumgarth 2018). With the intention to enrich the data retrieved from the literature analysis, and by doing so to take a step towards the validation of the themes of the underdog brand management framework (Fig. 1 and Table 3), we analysed the German soft drink company Fritz-Kola. Fritz-Kola was founded by two friends in 2002 in Hamburg, Germany, and has developed into a well-known competitor to Coca-Cola, Pepsi-Cola and other soft drink brands in the German market and beyond. Revenues are not known but have been estimated to be around €44,5 million in 2016. The brand is perceived as rather hip and stylish and seems most appealing to the younger, urban generation. Fritz-Kola was chosen for three reasons: first, it was the first brand that came to one of the researcher's mind when thinking about an underdog brand in Germany and discussing the brand with master's students within a brand management course, they agreed that Fritz-Kola could be considered as an underdog. Second, a quick search for the keywords "Fritz-Kola" and "Underdog" showed that the brand had been portrayed in popular management literature (newspapers, business magazines) various times as a successful underdog before, for example in May 2020, in a leading German advertising magazine (W&V, 2020). And third, the researchers had access to the brand's management and could therefore generate insider information about the branding strategy of Fritz-Kola. We found out that Fritz-Kola's brand management itself considers the brand to be an underdog. As recommended by Yin (2017), the Fritz-Kola case study considered different sources: to determine whether the themes of the underdog brand management framework were relevant

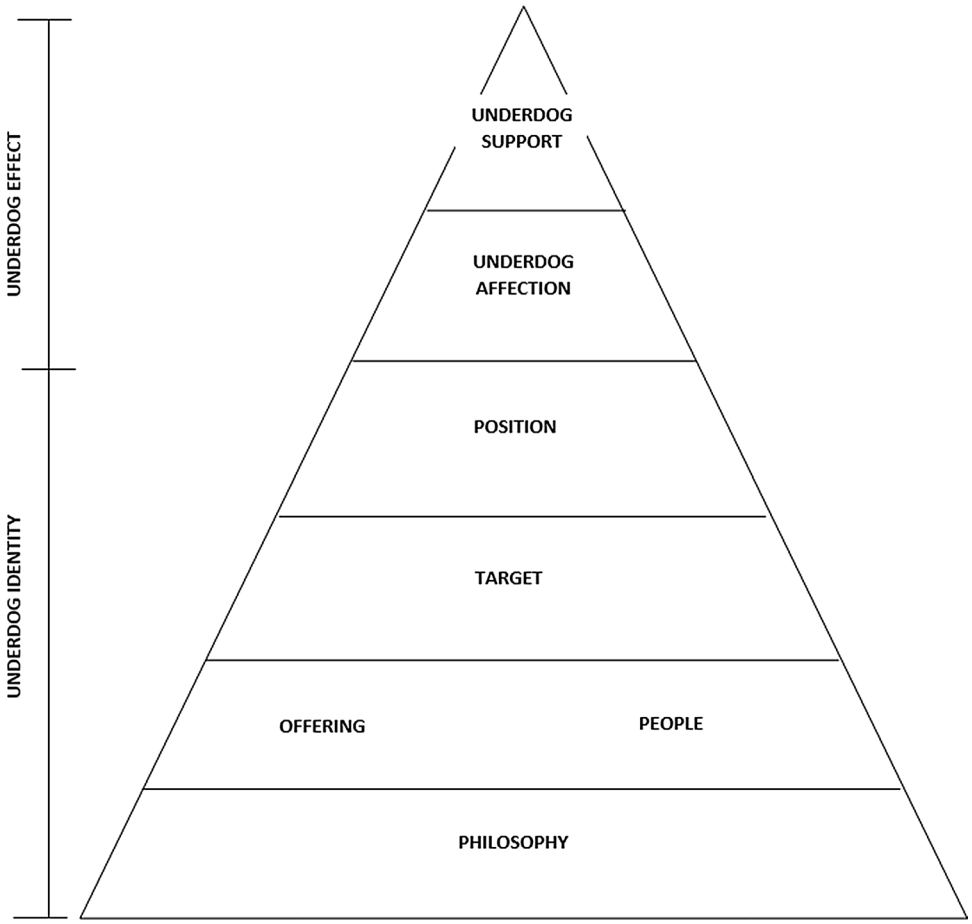

Fig. 2 Underdog brand management framework—themes

for management practice, we looked at accessible current and historic marketing material of the brand, analysed the "about us" parts of its website and had an interview with Fritz-Kola's chief brand officer which lasted about 40 min. The interview was transcribed and analysed. The results of our analysis (advertising campaigns, website, interview) are portrayed in the following paragraphs, referring to the themes of the underdog brand management framework.

Philosophy and culture From the interview, we learned that the competition with rival brand and world market leader Coca-Cola is a fundamental part of Fritz-Kola's reason for being: to create an alternative to Coca-Cola was indeed one of their founding motivations.

> And right from the start, the approach was to say that we want to develop an alternative to Coca-Cola, in terms of the recipe, in terms of sustainability, but also in terms of positioning, to consciously say: We are a small independent company trying to challenge a big one.

We were also told that to this day, the rivalry to Coca-Cola is a topic often used in Fritz-Kola's approach to marketing communications, and found plenty of proof of this statement when we analysed the brand's advertising. At Fritz-Cola, they indeed seem to celebrate their rivalry with the top dog Coca-Cola, and by doing so, the brand seems to proactively compete with the industry leaders with visible effort and success. For example, in 2013, they launched a print advertisement saying "Fritz-Cola congratulates Coca-Cola on a ground-breaking innovation", satirising the fact that Coca-Cola had just introduced the new Coca-Cola Life to the German market, a product based on steviol-glykosides made from stevia. A similar product had been already introduced by Fritz-Kola in 2011. We also identified various other advertisements that built on slogans with a direct or indirect connection to rival Coca-Cola, including "Who misses a red C?" (Fritz-Kola is spelled with "'K" and not with 'C' like Coca-Cola) and "Beware of old white men in big fancy sleighs" (Coca-Cola is known for its Christmas campaigns).

Another element of Fritz-Kola's culture is, as we learned from our interviewee, the strong focus on product excellence. It is remarkable that at Fritz-Kola, they interpret the term "quality" holistically:

Table 3 The themes of the underdog brand management framework (derived from the systematic literature review)

Theme	Sub-Category	Sources
Philosophy and culture (23% of unique cited literature[a])	Pro-active competition	Paharia et al. (2011), Wolburg (2003), Vandello et al. (2007), McGinnis and Gentry (2009), Jun et al. (2015), Shirai (2017)
	Product and/or service excellence in focus	Shirai (2017)
Nature of the offering (8% of unique cited literature[a])	Personalised products and services	McGinnis et al. (2017)
	Customised products and services	McGinnis et al. (2017)
	Localised products and services	Fishman (2014)
People/staff (4% of unique cited literature[a])	Hard-working	McGinnis et al. (2017)
	Appreciative attitude	McGinnis et al. (2017)
Segmenting and targeting (personality traits and profile of target group) (58% of unique cited literature[a])	Underdog self-identification	Kim et al. (2008), McGinnis and Gentry (2009), Paharia et al. (2011), Jun et al. (2015), Kao (2015), McGinnis et al. (2017), Kim et al. (2019), Anonymous (2014)
	Low materialism	Staton et al. (2012)
	Need for uniqueness	Tian and McKenzie (2001)
	Balance maintenance	Ceci and Kain (1982), McGinnis et al. (2017), McGinnis and Gentry (2009)
	Top dog antipathy	Tian and McKenzie (2001), Holt (1998, 2002), Paharia et al. (2014), McGinnis et al. (2017)
	Empathic concern	McGinnis and Gentry (2009), Jun et al. (2015), Han and Kim (2020)
Positioning (38% of unique cited literature[a])	Communication of explicit brand biography	Paharia et al. (2011), Sidali and Hemmerling (2014), Sidali et al. (2015), McGinnis et al. (2019)
	Emphasising humble beginnings and external disadvantages to conquer	McGinnis et al. (2017), Paharia et al. (2011), Staton et al. (2012), Sidali and Hemmerling (2014), Sidali et al. (2015), Angell et al. (2016)
	Showing passion and determination	McGinnis et al. (2017), Paharia et al. (2011), Staton et al. (2012), Sidali and Hemmerling (2014), Sidali et al. (2015), Angell et al. (2016)
	Inducing compassion	Staton et al. (2012)
	Making proof of available third-party endorsements	Shirai (2017)
	Focusing on hedonic consumption aspects of offerings	Li and Zhao (2018)
	Indicating adequate crowding (consumer support)	Wang and Muehling (2012), Shirai (2017)
	Make size and threat of nearby major competitor explicit	Paharia et al. (2011), Staton et al. (2012)
Underdog affection (23% of unique cited literature[a])	Emotional feeling/attitude	Staton et al. (2012), McGinnis and Gentry (2009), McGinnis et al. (2017), Anonymous (2014)
	Compassion	Vandello et al. (2007)
	Attachment	Wolburg (2003)
Underdog support (4% of unique cited literature[a])	Preference	McGinnis and Gentry (2009)
	Price premium	McGinnis and Gentry (2009)

[a]The underdog brand management framework is based on 26 unique sources from the systematic literature review that resulted in a total number of 44 articles (see "Appendix"). The remaining 18 articles were used to define and demark the term "Underdog Brand"

> Premium quality is important to us. It actually starts with the packaging. […] And then of course it's all about what's inside the bottle. But it is also about the bottlers with whom we work and for whom we have high standards. And of course, in the end also about ingredients.

Nature of the offering As is typical for a soft drink producer whose major business focusses on the home market, personalisation and localisation of products do not play a major role. But Fritz-Kola experiments with special editions of their bottle labels: For example, this year, with the intent to support LGBT rights and diversity, they changed their labels to a rainbow colour, and in the past, they have featured various influencers on their bottles who served as brand ambassadors.

People/staff Out interviewee told us that the mainly young employees of Fritz-Kola are hard-working and very hands-on, doing many things internally that are usually done by external providers. He also stated that staff shows a special commitment to the company, far beyond what can be expected by an employer. They also demonstrate great solidarity and strongly support each other, probably due to the fact that they perceive Fritz-Kola as a small company fighting to survive against a big one.

> We've even had people who tattooed the company logo or bottles somewhere. That is a brand loyalty or corporate loyalty that is really special.

Segmenting and targeting Customers of Fritz-Kola seem to identify strongly with the brand. We learned that typical customers are young, active, communicative people and students with a rather low income but living a digital lifestyle. They are interested in culture and in politics and expect of to take a stance on social-political topics. They are rather highly educated and critical against marketing and advertising. The sub-category "balance maintenance" did not find any support by the interview results or by other means of analysis.

Positioning In the section "about us" on its website (here and in the following see: Fritz-Kola 2020), the company strongly displays their brand biography, focusses on its humble beginnings and scarce resources and showcases the founding story of their dedicated leaders who were driven by a mission. For example, the narrative is used that the founders had no money to design a professional logo and consequently decided to use their own faces on the labels of the bottles. This logo is still in use today and, according to our interviewee, also shows the passion of the founders.

> I think if you put your face on something, it's so similar to signing in blood that the product is simply good.

The determination of the founders and their lack of resources is illustrated by the following quotation which can be found on their website: "It can be done better, said two friends, who scratched a few thousand euros starting capital together and decided in 2002 in the student dorm Hamburg-Othmarschen to found the project Fritz-Kola." The brand continues to describe its proactive competition with visible effort and success and their distinctive value proposition. "Their mission: a new Cola that is better than anything the big soda companies have to offer. Said and done." Fritz-Cola makes clear that the brand's success was only possible through the open and strong support of people and partners with passion and determination: "The Fritz-Kola project became a success because there were always people who helped us in the difficult initial phase." Additionally, the brand keeps talking about its superior, ethical and sustainable offering: "We have a responsibility to the environment and society. That is why sustainability and sustainable business are of particular concern to us." Our interviewee told us that the core of the brand can be described as being a "positive rebel", meaning a rebel that is not against something but fighting for a positive change. According to him, they also strongly focus on hedonic aspects of their products. Even so, the recipe of Fritz-Cola contains far more caffeine than many rival brands, in their communication, they depict the hedonic effects of being awake. The brand's strong focus on hedonic product characteristics was also evident when analysing the brand's advertising.

> [At Fritz-Kola, it is] Clearly more about the attitude to life. [...] We turn the caffeine content into an attitude towards life. […] What can you do by being awake? Partying all weekend […] For us, this is above all a spiritual alertness and spiritual freshness and spiritual agility.

Underdog affection and support Our interviewee argued that many people are emotionally connected with Fritz-Kola and feel a strong attachment to the brand. Fans of Fritz-Kola often perceive the brand as being trustworthy and congenial. But, in contradiction of the underdog brand management framework, in the context of Fritz-Kola, we couldn't find any reference to any strong compassion for the underdog: consumers seem to like Fritz-Kola because of its underdog nature without feeling sorry for the brand. The strong attachment to the brand has led to a growth rate that is higher than the average within the product category and to a small but remarkable price premium that people are willing to pay for Fritz-Kola.

> And this David versus Goliath story, yes, it's one of the oldest stories of mankind, so to speak. And it just works very universally, you have to say.

Table 4 shows which themes of the proposed underdog brand management framework could be identified via the Fritz-Kola case study. As a summary, the data of the case which was used to triangulate the findings of the literature review indicate that the underdog brand management framework needs some fine-tuning but might be a good starting point for brand researchers and practitioners who are involved in the management of such brands.

Table 4 Evaluation of the underdog brand management framework, based on the Fritz-Kola case study

Theme	Sub-category	Degree of support	Source
Philosophy and culture	Pro-active competition	+ +	Website, Interview, Advertising
	Product and/or service excellence in focus	+ +	Interview
Nature of the offering	Personalised products and services	–	Interview
	Customised products and services	+	Interview
	Localised products and services	–	Interview
People/staff	Hard-working	+	Interview
	Appreciative attitude	+	Interview
Segmenting and targetting	Underdog self-identification	o	o
	Low materialism	+	Interview
	Need for uniqueness	+	Interview
	Balance maintenance	o	o
	Top dog antipathy	+ +	Interview
	Emphatic concern	+ +	Interview
Positioning	Communication of explicit brand biography	+ +	Website, Interview
	Emphasising humble beginnings and external disadvantages to conquer	+ +	Website, Interview
	Showing passion and determination	+ +	Website, Interview
	Inducing compassion	–	Interview
	Making proof of available third-party endorsements	+	Interview
	Focusing on hedonic consumption aspects of offerings	+ +	Website, Interview, Advertising
	Indicating adequate crowding (consumer support)	+ +	Website, Interview
	Make size and threat of nearby major competitor explicit	+ +	Interview
Underdog affection	Emotional feeling/attitude	+ +	Interview
	Compassion	–	Interview
	Attachment	+ +	Interview
Underdog support	Preference	+ +	Interview
	Price premium	+ +	Interview

+ +: Strong support; +: partial support; –: contradiction; 0: no information available

Implications for theory and practice

The research described in this article provides a solid literature overview to the under-researched but important topic of underdog brands (Paharia et al. 2011), helps to delimit underdog brands from other, related terms, like follower or niche brand, and offers a new definition of the term which will help to inspire brand management scholars. The delineation of the term "underdog brand" helps to clear the fog around the topic and prepare a basis for future researchers to conduct their studies in a targeted manner and draw the right conclusions. After all, brand research, to be useful for practice, should consider various industry contexts, and various brand types must be managed by differentiated strategic approaches.

Overall, we argue that brands relying on the underdog effect will find new ways to engage and satisfy global customers by exploiting consumers' underdog affection and underpin this thought by analysing the case of a successful underdog brand. The derived conceptual brand management framework for underdogs offers a springboard for future research and valuable insights for brand management practice.

Brand researchers might want to consider that there is no such thing as "the underdog brand" but various types of brands that represent more or less the underdog narrative and use it to a different degree. This implies that research about underdog brands needs to clearly define what type of underdog brand it refers to. Building on this, it is still not clear what concrete role authenticity plays when brands want to take advantage of the underdog effect. When is an underdog brand authentically perceived as an underdog by consumers? Is it enough to use the underdog narrative in marketing communications, or are there other factors, such as brand aesthetics (Buschgens et al. 2019) influencing consumers' underdog perceptions? What role does brand heritage play (Burghausen and Balmer 2015; Santos et al. 2016)? Is the perception and the degree of efficiency of the underdog effect changing in a digital and globalised world, and if so, to what degree and in what way? How promising are co-creative instruments of brand management (e.g. brand communities, co-innovation, crowdsourcing, influencer marketing) (Iglesias and Ind 2020; Ind and Schmidt 2019) for underdog brands? Are they more relevant for underdogs compared to top dogs, or less relevant? What should internal branding at underdog brands look like (Merrilees 2016)? And what kind of industries (e.g. B-to-B, services) are, for what reasons, most promising for brands to play on the underdog narrative, and are there differences of the effectiveness of the underdog effect within different stages of the product lifecycle? These are just some of the most pressing questions around underdog brand research.

From a *managerial perspective*, the conceptual framework discussed in this article illustrates how an underdog brand should be managed and can be used as a blueprint for brand building by start-ups and newer companies. Based on the research presented in this article, a number of recommendations for the management of underdog brands can be derived in practice, which results directly from the Underdog Brand Management Framework (see Table 4). We would like to point out the five most important of these practical implications from our point of view: Firstly and maybe most important, underdog brand biographies are effective brand marketing tools (Paharia et al. 2011; Staton et al. 2012) and the competitive narrative—its battle with a large competitor and its determination in overcoming the external disadvantages—should be made salient (Nguyen and Grohmann 2020). Therefore, we would like to recommend that the managers of underdog brands reflect on the key data of an organisation's origins, translate this data into a rather dramatic founding story and express it on the company website and at other suitable brand touchpoints (e.g., through regular postings on social media, in a company brochure, in the entrance area of the company buildings, via other channels of marketing communication). The story should be based on the general rules of storytelling, presented in an exciting form and—in order to increase the perceived authenticity—contain verifiable personal information about the founder(s) (Lundqvist et al. 2013). It is important that history makes it clear that competition with a dominant market player has been deliberately sought with the aim of offering a superior product or better service in order to improve existing deficits in the interests of customers. Customers become part of a movement for the better—co-creating a better future for themselves and for others through their underdog support. The product or the service offered does not necessarily have to prove its superiority in its core benefit: an improved added value, such as a specific service that accompanies the core service, can also be a testament to the superior value of the offer for many underdog brands. N26, a digital bank founded in 2013, states for example that the founders "Max" and "Valentin" strove to set new standards in banking, to revolutionise the management of money and to make banking better. This is possible, among other things, because all banking transactions can be carried out via their App and no paperwork needs to be done (N26, 2021). Often, however, the mentioned added value is found at an emotional level in a particular social or ethical claim. For example, the Dutch chocolate brand Tony's Chocolonely points out on its website that the brand was founded by a journalist who was so shocked by his research into child labour in the chocolate industry that he actively wanted to take action against this grievance (Tony's Chocolonely 2021c). The successful underdog brand makes it explicitly clear that its product is directed against "chocolate giants" that control the chain of value in such a way that profits for third parties (e.g., African small farmers) are as low as possible, and that it fights with the support of their customers against modern slavery and child labour (Tony's Chocolonely 2021b). Customers are declared allies by calling for support for the movement founded by Tony Chocolonely and to enable "a sweet solution to chocolate's bitter truth" through their product purchase (Tony's Chocolonely 2021a). Secondly, and connected with the first point, the underdog should not wait for the top dog to make strategic moves; it should rather be proactive (Baik and Shogren 1992). The corporate antipathy halo effect is not sufficient. Brands need to show that they are fighting

back to benefit from the underdog effect (McGinnis and Gentry 2009). Thirdly, underdog brands' human resources managers should pay more attention to the alignment of job seekers and applicants to company values rather than to their competencies. Underdog brands often have a very special culture, which is a key success factor in their entrepreneurial activity. This culture should not be jeopardised under any circumstances, which could be a real challenge, especially in times of rapid growth. Fourthly, focus should be on clearly identified customer demographics and on satisfying specific needs (Fishman 2014). Those potential customers who are not obsessed by mainstream ideas and who are looking for something new and special should be focused on. Against this background, psychographic approaches to segmentation are likely to be more promising than demographic ones. And finally, the underdogs' communications managers should not forget to make their own success visible, because successful underdogs are more valued than losers. This can be achieved by publishing information about the organisation's growth (e.g., market share, sale, number of customers/employees), by pointing to the underdog's positive image, or by using interesting and convincing testimonials in advertising and social media.

Critically examining our research, we admit that our underdog brand management model was developed on the basis of existing literature. We considered what other researchers recommended but did not explore new roots within underdog research. Therefore, the design of the framework has limitations. Furthermore, the model validation solely relied on a single case study, taken from a consumer market. It would also be of interest to quantify the impact of the internal model factors on the underdog effect.

Concluding remarks

More and more markets in our global society are dominated by a few successful companies. This is due, among other things, to the dynamics of the Internet: The network favours the emergence of monopolies, as market leaders such as Google, Amazon and Facebook are so attractive precisely because they have very high user numbers, generate high switching costs and can therefore also increasingly dictate the rules of the game (Barwise and Watkins 2018). In addition, it is becoming easier for established brands to ascertain and use communication and distribution channels in order to have a global presence (Steenkamp 2017). The alignment of consumer behaviour, which has been observed in selected markets such as technologies for some time, strengthens the position of the market leaders (De Mooij 2019). The question of how entrepreneurial success is still possible for smaller market players in this environment is therefore becoming increasingly important. Underdog positioning offers smaller or newly established brands the opportunity to break the cycle of success and—beyond a niche—to demonstrate presence and flex muscles in the territories of the big players. It can therefore be assumed that the underdog effect will play a major role in the brand management of the future for many market players. This is exactly why our research is relevant.

The purpose of this article was to present the most current definition of an underdog brand and the underdog effect as well as to propose a corresponding underdog conceptual brand management framework. This first of its kind framework posits that, like David against Goliath, underdog brands can compete against the better-resourced top dogs. This requires a specific philosophy, adapted offerings and committed people. Underdogs should position their brands through specifically narrated brand biographies in the minds of consumers who self-identify as underdogs. Leading brands should beware, an underdog may just bite.

Appendix

See Table 5.

Table 5 Overview of the key results of the systematic literature review

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
1	Simon	1954	Public Opinion Quarterly		It refers to people voting for a candidate who is expected to lose (opposite to bandwagon effect)		
2	Ceci & Kain	1982	Public Opinion Quarterly	Non-dominant	Switching support to a non-dominant competitor (opposite to bandwagon effect)	Oppositional reactivity was found to move voters to support the underdog rather than greater awareness of the underdog's position and personality	
3	Hoch & Deighton	1989	Journal of Marketing	Weaker brands—measured in terms of proportion of sales. Smaller, less powerful and fewer resources. An underdog in one evoked set may be a top dog in another			Learning through experience is more valuable for underdogs than for top dogs
4	Frazier & Snyder	1991	Sociology of Sport Journal	Less talented with lower potential and inferior	Peoples' perception that underdog athletes are more dedicated		
5	Baik & Shogren	1992	The American Economic Review	A competitor with less than one-half chances of victory compared to the Nash equilibrium, as opposed to a top dog which chances are more than one-half at the Nash equilibrium			Pro-activity: The underdog should not wait for the top dog to make strategic moves
6	Gnepa	1993	Journal of Advertising Research	Low market-share brands. Lesser-known brands			Underdog brands often use comparative advertising
7	Holt	1998 2002	Journal of Consumer Research			For moral reasons: to be nonconformists and to position themselves against capitalism and consumerism	
8	Tian & McKenzie	2001	Journal of Consumer Psychology			The support of underdogs expresses a countercon-formity motivation (similar to Holt 1998 and 2002)	
9	Wolburg	2003	The Journal of Consumer Affairs	Small regional brands that struggle to compete against industry giants. Brands that fight to stay alive			In the soft drink industry, the only strategy that seemed successful for an underdog was head-to-head competition with the market leader

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
10	Dean	2004	Journal of Product & Brand Management				Underdog brands can benefit from brand association spill over effects
11	Parsons	2005	Children's Literature Association Quarterly	In a political context, the subjugated			
12	Vandello, Goldschmied & Richards	2007	Personality and Social Psychology Bulletin	Individuals or groups who are at a disadvantage and are expected to lose. A competitor with low likelihood of success and with limited resources	An increase in support for someone who is positioned as underdog	An underdog exerts greater effort. This mediates liking. But the successful outcome must be deserved. Also, concerns with justice and fairness drive support for the disadvantaged	
13	Kim, Allison, Eylon, Goethals, Markus, McGuire & Hindle	2008	Journal of Applied Social Psychology	"… the loveable loser …" (p2). Someone encountering difficulty competing against an advantage opponent. An underdog achieves success from modest origins	"… people's tendency to support or root for an entity that is perceived as attempting to accomplish a difficult task, and who is not expected to succeed against an explicit or implicit advantaged opponent" (p4)	Every person has been an underdog at some point	The underdog effect seems to be universal
14	McGinnis & Gentry	2009	Journal of Business Research	David-vs-Goliath; "non market-dominant entity" (p191); brands that succeed despite disadvantage; mom-and-pop stores competing against huge discount stores; all brands, excluding the limited number of market leaders or top dogs. But: A large brand can also be viewed as an underdog due to its humble beginnings and lower income target market	Consumers in some instances pay a premium to support the underdog	Due to self-identification. Underdog brands have an alternative appeal; consumers support underdogs because of "empathy, as a way to ensure the maintenance of equal opportunity in competition … and as a way to provide personal inspiration … being "anti-corporate" (p. 191 & p. 198)	The corporate antipathy halo effect is not sufficient. Brands need to show that they are fighting back to benefit from the underdog effect. Proactive and visible effort is important: lack of effort may turn underdogs into losers in consumers' minds
15	Goldschmied & Vandello	2009	Basic and Applied Social Psychology				It is advantageous for politicians to be positioned as underdogs

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
16	Keinan, Avery & Paharia	2010	Harvard Business Review	Underdogs are small and new, competing against powerhouses. Top dogs are characterised by experienced founders and a big marketing budget			Underdogs are typically scrappy and referring to their humble beginnings. Samuel Adams Brewery highlights its small size compared to the top dog even though it is bigger than most craft brewers
17	Lee	2011	Social Choice and Welware		The opposite of the bandwagon effect, it is voters supporting candidates that seem to be losing due to sympathy		
18	Paharia, Keinan, Avery & Schor	2011	Journal of Consumer Research	Underdogs are of humble origins (had fewer resources —a disadvantage) and eventually succeeded due to their attributes of determination (a struggle) and passion; brands with external disadvantage but passion and determination	Underdog biography enhances consumer preference—improves purchase intention, actual purchase and loyalty	Underdog status elicits positive feelings due to brand-consumer personality congruence and self-identification	Target market: Consumers that self-identify as underdogs because underdog status influences their consumption strongly and positively; consumers in cultures where underdog narratives are entrenched in the national identity. Underdog brand biographies are effective brand marketing tools and should include the disadvantages that the brand had to content with as well as references to the passion and determination required
19	Staton, Paharia & Oveis	2012	Advances in Consumer Research	Underdog = weak			Underdog brands could benefit from inducing feelings of compassion through the use of brand biographies and by targeting lower socio-economic status consumers
20	Wang & Muehling	2012	International Journal of Advertising				Brand owners should make available proof of third-party endorsements

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
21	Contractor	2013	International Journal of Emerging Markets	Emerging market multinationals, by extension, may be underdogs and have fewer resources, less knowledge, less international experience and less brand familiarity			
22	Sidali & Hemmerling	2014	British Food Journal	Local unknown small-scale traditional specialties producers from humble beginnings and who struggle against stronger competitors. But: Large organisations (like Apple) are using the underdog narrative, too			An underdog biography could be an effective brand marketing strategy of small traditional food specialties organisations
23	Anonymus	2014	Strategic Direction	A small brand		Consumer underdog identification (internal feeling)	An underdog brand should emphasise its battle with a large competitor—making the competitive narrative salient by the time of purchase
24	Fishman	2014	Franchising World	Budget more limited than big players—can't advertise on major TV channels	Being smaller (more flexible and faster) can result in higher ROI		Segmentation, word-of-mouth advertising, physical evidence; loyalty programme; localisation & affective branding; social media
25	Paharia, Avery & Keinan	2014	Journal of Marketing Research		Consumers' desire to support the underdog. Consumer support increases for smaller brands when it's competing against a top dog rather than similar sized organisations (fair fight)	Consumers may be motivated to have an impact in the marketplace through their purchase choices. Can result in purchase activism and boycott of big brands	Highlight top dog's size and threat. The presence of a mayor competitor/ a salient competitor is a necessary condition for the underdog effect to be possible
26	Sidali, Kastenholz & Bianchi	2015	Journal of Sustainable Tourism				

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
27	Jacobs	2015	Appetite				"Brand biographies can be used strategically to mitigate the negative stigma associated with size and power." (p36)
28	Jun, Sung, Gentry & McGinnis	2015	International Journal of Advertising	Underdog brands are disadvantaged but are persistent		Consumers with empathetic concern support underdog brands	Underdog brands should make their underdog status salient in their advertising and target consumers that are highly emphatic with their advertising
29	Kao	2015	Journal of Consumer Behaviour	An underdog brand grows from a modest beginning. It struggles to overcome the odds to succeed with determination against well-resourced opposition			Start-ups and newer brands can benefit from positioning the brand as an underdog (external factors) as well as segmenting and targeting consumers that self-identify as underdogs (internal factors). New underdog brands should focus on vigour and aggressiveness whereas established underdog brands should use explicit underdog brand biographies
30	Laybat &Tredinnick	2015	Business Information Review				Social media can be used to position underdog brand
31	Stock & Gierl	2015	Die Unternehmung	Founders started from humble position but overcome obstacle			Use brand biographies to tell brand story
32	Angell, Bottomley & Doyle	2016	Harvard Business Review	Small company vs. Goliath. Status differential between underdog and top dog	People loving it when an underdog beats a top dog. Enhanced word of mouth, increased turnover and lessening support for top dog. The attraction of consumers to the underdog brand. An emotional connection and support from consumers		By using brand biography that script the determination and disadvantage. This could include the stories of people associated with the organisation. Lead with emotional connection (passion and commitment) and follow with rational aspects (performance)- feelings of warmth rather than competence

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
33	Nariswari & Chen	2016	Marketing Letters			The losers of consumer co-creation strategies may be so disappointed that they will support an underdog competitor. This forms part of the customer voting phenomenon	
34	Kirmani, Hamilton, Thompson and Latzy	2017	Journal of Marketing		Consumers' empathy with the underdog	Consumers value competence above morality. However, underdog positioning moderates this by reducing the effect of less competence of moral underdog service providers	Moral (e.g. socially conscious) service providers that cannot compete on competence/ performance ratings could benefit from underdog brand positioning
35	McGinnis, Gao, Jun & Gentry	2017	Journal of Service Management	Small locally owned businesses trying to survive against dominant competitors with concentrated power in a globalised world		Consumers may support underdog brands as a result of their underdog affection (emotional response). Top dog antipathy and balance maintenance influence underdog affection the most	Target consumers with underdog affection. Advertising messages should relate to humble beginnings and disadvantage. This should be supported by personalisation, customisation, local offerings, better service, hard-working employees and appreciative attitudes
36	Shirai	2017	Journal of Consumer Marketing			Consumers support underdogs because it is presumed that they work hard and face challenges	Organisations should focus on hedonic consumption aspects of offerings and could reduce perceived consumer risk by indicating that the underdog has support from other consumers—mentioning number of consumers and consumer testimonials
37	Li & Zhao	2018	Asian Journal of Social Psychology			Consumers use hedonic products to express their own underdog identity and therefore identify with the underdog brand stories of this type of product	Focus on hedonic products with underdog brand stories which has greater consumer brand identification than functional products

Table 5 (continued)

No	Authors	Year	Journal	WHAT is an underdog (brand)?	WHAT is the underdog effect?	WHY do consumers support underdogs?	HOW can the effect be managed?
38	Zourrig & Hedhli	2018	International Journal of Consumer Studies	A customer that has been wronged by a powerful organisation			
39	Kim, Park & Lee	2019	Psychology & Marketing		Consumers being more forgiving of underdog non-relational failures	People think of underdog brands as anthropomorphised [personified] close friends whom they are willing to help, support and feel close to, rather than as just an inferior company with few resources" (p36)	Underdog brands must be vigilant not to commit relational failures
40	Kao	2019	Journal of Product & Brand Management			Consumers with malicious envy are more likely to support underdogs	Target consumers with malicious envy rather than benign envy
41	Kao & Wu	2019	International Journal of Bank Marketing			Highly affection-oriented clients, that feel emotions intently, tend to support underdog brands	Focus on consumers with high affection needs
42	McGinnis & Glibkowski	2019	Qualitative Market Research: An International Journal				To retain its appeal a successful underdog celebrity brand should communicate an authentic brand story and be transparent and approachable
43	Siemens, Weathers, Smith & Fisher	2020	Journal of Advertising				If an underdog brand is sold to a big corporation, the brand can retain some consumer support if it is perceived as being authentic and should communicate that the sales will result is increased benefit to employees and consumers, rather than a profit or efficiency motive
44	Han & Kim	2020	Marketing Intelligence & Planning			Consumers want to limit absolute differences between their own and others' outcome by supporting underdog brands	Target consumers with a prosocial value orientation

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Dr. Holger J. Schmidt has been Full Professor of Marketing at Koblenz University of Applied Sciences since 2011. His research and teaching focusses on brand management, Internal Branding, B2B marketing and sustainable marketing. He is the author or editor of 9 books, and his work has been published in Journal of Brand Management, Journal of Product and Brand Management, Journal of Retailing and Consumer Services, and Corporate Reputation Review amongst others.

Dr. Pieter Steenkamp is a Lecturer in the marketing department of the Cape Peninsula University of Technology in Cape Town. He obtained a PhD and MBA from the University of Stellenbosch Business School. He presented research papers at international and national conferences and published in academic journals, including the Journal of Retailing and Consumer Services, Journal of Business-to-Business Marketing and the Retail and Marketing Review. His research focuses on brand management.