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Faculty of Business, Law and Art

Winchester School of Art

The integration of typological appraisal into the design process for trademarks

by

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Thesis for the degree of Doctor of Philosophy

May 2019
ABSTRACT

Faculty of Business, Law and Art

Winchester School of Art

Thesis of the degree of Doctor of Philosophy

THE INTEGRATION OF TYPOLICAL APPRAISAL INTO THE DESIGN PROCESS FOR TRADEMARKS

Francesc Ribot Puntí

In view of the mimicry perceived in the formal expression of trademarks in certain consumer sectors, this practice-based research evaluates, through three practical approaches, whether this phenomenon is a factor to consider when designing these identity devices.

The first validation is the case study of the Universitat de Barcelona, where a typological appraisal can be integrated into the redesign process of its trademark. The second typifies the relationships between the verbal and visual sign which are perceived to be adopted by trademarks, and includes a classification proposal. Finally, in order to integrate a typological appraisal into the design process in a practical way, the thesis offers an online consultation tool with open access. This allows the verification of formal features that coincide among trademarks, thereby placing them in a particular sector or indicating the common characteristics of their positioning.

The results obtained can facilitate a methodological design process for visual identity devices, appraising typological suitability according to the conventions embedded in the categorisation systems of products and services, and thus in the perception of the target audience for whom they are intended. The potential of this tool goes beyond design practice, enabling an analysis of the typological visual expressions of trademarks in other areas of study that consider the social, economic and political impact of these devices.
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AUTHOR'S DECLARATION

I, Francesc Ribot Puntí,

declare that the thesis entitled
The integration of typological appraisal into the design process for trademarks

and the work presented in it is my own and has been generated by me as the result of my own original research.

I confirm that:

* This work was done wholly or mainly while in candidature for a research degree at this University;
* Where any part of this thesis has previously been submitted for a degree or any other qualification at this University or any other institution, this has been clearly stated;
* Where I have consulted the published work of others, this is always clearly attributed;
* Where I have quoted from the work of others, the source is always given. With the exception of such quotations, this thesis is entirely my own work;
* I have acknowledged all main sources of help;
* Where the thesis is based on work done by myself jointly with others, I have made clear exactly what was done by others and what I have contributed myself;
* Either none of this work has been published before submission.

Signed: Francesc Ribot Puntí Date: 9th May 2019
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ABBREVIATIONS

AMA American Marketing Association
AtypI Association Typographique Internationale
ARWU Academic Ranking of World Universities
BS British Standards
CMYK Cyan, Magenta, Yellow and Black process colour printing
CWUR Center for World University Rankings
EFTA European Free Trade Association
ICANN Internet Corporation for Assigned Names and Numbers
ITC International Typeface Corporation
NGO Non-governmental organization
PMN Type designer Peter Matthias Noordzij
QS Quacquarelli Symonds Ranking
RAL German Committee for Delivery and Quality Assurance colour matching System
RGB Red, Green and Blue displays additive colour model
THE Times Higher Education
TM Trade mark
UAB Universitat Autònoma de Barcelona
UB Universitat de Barcelona
WIPO World Intellectual Property Organisation
WRWU Webometrics Ranking of World Universities
1. **Introduction**

Any approach to the concept of commercial trademarks involves multiple disciplines that the subject encompasses. It has primarily been studied from perspectives related to history, marketing, management and the ethology of the receiver. In general, the academic world has studied the brand little from the praxis of design. It has been designers who have generated a greater quantity of literature in this sense, although, frequently establishing a more commercial discourse of self-selling than one from a perspective of methodological rationality.

A methodological approach to the design of trademarks is complex as it is subject to the various factors that interact in the creation of a visual language. Hence, the success of its result can never be considered simply the merit of a correct disciplinary execution, but rather a good coordination of multiple factors, where the measure of each adds its own specific context of action within the whole.

This thesis explores one of these factors: the design of the basic elements of visual identity. It specifically links the suitability of a trademark’s design to its typological appraisal. In other words, if the typified combination between the verbal and visual sign is appropriate for the functions to be accomplished.

**Background of the research issue**

In a report published by WIPO (World Intellectual Property Organization), it is estimated that 4,610,000 new trademarks were registered worldwide in 2016, and that a total of 39.1 million registrations were active, with their corresponding fees fully paid up and, as such, were legally defensible. These data denote the huge complexity involved in competing in a market that, globally, is increasingly interconnected and saturated with offers for products and services. According to Olins (2008, p.15) it is evident that the nature of competition is changing, given that in most sectors there is an imperceptible difference in price, quality and service between the products and services being offered, which he refers to as the rational factors.

The author affirms that being the best no longer guarantees being chosen by the consumer. Adding, that to be relevant in other ways; you have to be liked, respected and admired more than your competition.
Frutiger (1981, p.170) states that, due to a wave of iconographic information and pictorial sequences, society communicates increasingly with a language of image. So the idea has taken root that in order to form a believable, coherent narrative, apart from considering a business and marketing strategy, it is also necessary to have an aesthetic one. As Schmitt & Simonson (1998, p.32) explain, the three strategies are different; the business strategy defines strengths, how the entity is organised and what milestones it aspires to achieving, while the marketing strategy defines everything related to market segments, the target public and who its main competitors are. The aesthetic strategy takes into account the other two in order to express, through visual and other sensorial media, the organisation’s mission, goals and culture. Mollerup (1997, p.12) calls these means, which represent the visual part of an entity's corporate identity, its visual identity. He also shares the same idea as Margulies (1970, p.31), that all organisations possess a visual identity; whether its members believe it or not – some creating one then carefully nurturing it, while others neglect theirs. Schmitt & Simonson (1998, p.72) explain that the visual identity is projected through various aesthetic styles and themes, yet it is normally never appreciated in its entirety, but rather various perceptions end up forming a general impression of it. In addition, according to Starling (2011, p.112), we are able to recognise it even without being able to understand it at a linguistic or artistic level. Commercial brands understood in a “modern” way are those that have most deliberately used the construction of these visual languages, doing so with the intention of being persuasive. They want to convince consumers by means of a discursive stance that generates empathy in them, thereby influencing their purchasing or contracting decisions. As Margulies (1970, p.31) asserts, from the moment an organisation initiates its activity, and during its existence, it starts to form, consciously or not, a distinct visual identity that communicates everything it says or does. Consequently, it follows that not all organisations that project their presence correspond to commercial brands: a public transport system; an emergency service; a religious community or a non-profit organisation also communicate via a visual identity. Despite not having a lucrative function, they also need to build an identity in order to be identifiable and generate meaning. The visual identity programme is the tool that organisations use to control and manage how they will present themselves outwardly and, as Chaves (1996) and Mollerup (1997) indicate, this constitutes a complex message system that can manifest itself in each and every one of the components.
of an organisation. These messages range from those that specifically identify the institution, such as trademarks, to those that do not have a labelling function, but which represent its attributes and values. This enables me to assume that components of the visual identity can be classified in two types – basic elements and complementary ones.

The basic elements correspond to those devices that can be registered in legal terms and that help to identify and differentiate the brand (Mollerup 1997; Keller 1998; Silvia-Rojas & Roast 2006, p.5; Olins 2008, p.36): trademarks. According to Frutiger (1981), the saturation of offers is such that only by representing organisations with abbreviated signs are they able to be seen, recognized and recorded in the memory of the receiver – a concision that simplifies the complexity of the market (Buck, 1916, p.36). These signs have become emotional symbols, under which many forces are concentrated, assuming an independent role in human thought and the commercial process (Werkman 1974, p.82). As defined by Keller (2013), Aaker (2002) and Olins (2008), they are the most powerful devices in bestowing cohesion, structure, recognition, memorability and, consequently, value upon an identity. These are the essential graphic attributes that distinguish visual identity in a particular way, making it different from others. At the same time, they are the most unequivocal and ubiquitous signs in any of the media where the entity is communicated and, on a reading level, at the top of visual hierarchy. They present the central idea of the organisation with impact, brevity and immediacy, while encapsulating a meaning (Olins 2008, p.30). In addition, they can be registered as intellectual property, and the law can penalise their plagiarism or impersonation. Consequently, modern brands today have consolidated the use of trademarks: devices that represent, according to Aaker (2014, p.96), the promises of organisations to provide what constitutes their reason for being and, in functional terms, emotional benefits as well as an individual’s social self-expression.

The complementary elements are those that cannot be individually registered and, on analysis, can be used by other organisations. Hence, these elements are not exclusive to the brand. They comprise typography, a colour palette, a certain photographic style and a composition style. What makes them exclusive in terms of interpretation is the way in which their collective composition is systematised. Lightfood and Gerstman (1998, p.53) and Olins (2008, p.30) define this as “visual equity”, a concept
that derives from the "visual form", in other words the "look and feel", which can be considered as the recognition pattern of visual identity. Unlike trademarks, even though these patterns form part of the visual identity programme and are related to the trademarks in question, they are more variable in time.

The virtues of brands, from the devices that represent them to their visual identities, are so effective that, currently, as indicated by Batchelor (1998, p.95-102) at Interbrand, their value has become part of the economic balance of many companies, since they have become key in the creation of their wealth, hence having important implications in the way they are managed. A management that encompasses different fields of specialisation, such as business management, or that of marketing, as well as managing the visual expressiveness of the messages transmitted by the organisation. Designers, as specialists in visual communication, play a relevant role in the configuration of these devices.

Research Problem

It is difficult to theorise about a methodology that guarantees the success of a productive activity when its process includes creativity as a determining factor. Design, and its disciplinary specialisations, have been gaining representation in the industrial and business world, and today have become very valuable, due to their ability to communicate certain values and meanings to users or consumers.

In general terms, the methodological processes related to design have been studied from different perspectives, but in the case of graphic design, these have been scarce from an academic point of view. The thesis focuses on a methodological approach in the field of graphic design, and in particular on the specialisation of trademark design.

Of the disciplinary specialisations of design, graphic design is that which performs its activity within visual communication; speculating with the aesthetics of languages, creating new ones, transforming them, systematising them and adapting them to different dimensional media. All this activity revolves around the image and the word, and in graphic design terms, around colour, shape, composition, image and typography. If the designer addresses his work with a will to become a creator at the service of his own experimental vocation, he will have much more
freedom to speculate with visual languages than the designer who tackles the task as a commission which should meet the relevant requirements of the circumstances. When I speak of methodological processes in graphic design, they acquire meaning in the second case, since the determining factors become analytical factors that change according to the circumstances and are therefore susceptible to processing with a theoretical basis. Trademark design would clearly form a part of the project typology, due to the need for a methodological approach, since the determining factors are not only related to the requirements of positioning but also demand a high degree of precision in resolving functional issues. I believe it is important to mention that my own position, as a specialist in trademark design, also corresponds to this stance. I consider myself to be a designer that does not pursue a stylistic positioning, but rather a creative one that is adaptable to every need. Consequently, I require a theoretical basis that conditions the formal result. In this sense, it should be noted that I work in the confluence of two approaches to the discipline: that of practitioner and as a researcher. Both are relevant and complex in themselves, and their simultaneous practice is one of the characteristics that motivated this research project.

I have found some difficulty in finding a consolidated line of thought, from both the profession and academia, regarding the discipline of graphic design, and even less on the design of elements of visual brand identity. It is generally we, the professionals, that incorporate methodological processes created by ourselves or by colleagues in the sector, and there are also cases where, as designers, we adapt to a methodology incorporated by the client.

In general, as Schmitt and Simonson point out (1998, p.38), the literature on the subject has focused primarily on strategic marketing issues and not on how to strategically create a symbol; how the brand does what it does; how it offers tangible value; and even less on the diversity of possible sensory elements to combine in creating a brand identity. Also, in Spain, the field of visual communication research is limited to academic territories, while technical agents (publicists, graphic designers, designers, journalists, presenters, etc.) tend to stick to their work, far removed from theoretical domains (Chaves & Pibernat 1986, p.23). Apart from the lack of literature on trademarks creative processes, nothing has even been formulated regarding the validation of their results. In the management and marketing academic realm, I can mention
authors who have analysed the interpretation made by consumers of the formal expression of trademarks, based on experiments and empirical analysis. I consider Henderson & Cote (1998) relevant in their article "Guidelines for Selecting or Modifying Logos", where they develop, from a qualitative study, guidelines to assist managers in selecting or modifying trademarks to achieve the goals of corporate image. Also, Bottomley & Doyle (2006; 2016) are important for exploring the significance that colour and typography take on in the formalisation of trademarks. However, I have identified a large group of authors (Hargittai and Hargittai; 1997; Van Riel & Van den Ban, 2001; Grohmann, 2008; Marsden & Thomas (2013), Suzuki & Yamamoto, 2014; et al.) that have been analysing, in a qualitative way, how consumers evaluate the perceived meaning of trademarks, based on their formal expressions. Marsden’s work (2016) "Understanding organisational expression: How brand marks change over time" is also noteworthy for his analysis of the expressive evolution of trademarks according to specific contexts. It is an interesting question, as it invites us to consider how the expression of trademarks is conditioned by the influences they receive from their environment.

What is clear is that creativity connected to the systematization of a methodological process always will be subject to a range of environmental factors generated by a discipline such as this. Multiple factors not only of a formal or aesthetic nature, but also from the circumstantial environment where the design performs and the operational capabilities of those it represents. Mollerup (1997) corroborates this by saying no one discipline offers an exhaustive explanation, and that this characteristic is particularly pertinent in the study of trademarks, which can be approached via the roots of several fields, such as: anthropology, history, heraldry, psychology, marketing, semiotics, communication theory, and obviously the discipline of graphic design. And this is where I could establish two lines of research about trademarks. It is in these two ways of approaching theorisation where a certain distance is perceived between investigation based on theory and investigation based on practice. As Martí (1999, p.31) identifies, one carries out the task away from the project and productive processes, while all the conclusions concern the final results of these processes. On the other hand, the other influences the workings of the process as well as the control of its techniques. Relevant differences when addressing the theoretical aspects of the discipline. And it is in this double dichotomy between the theoretical approaches and the proven praxis where the thesis is based. How professional practice can
provide keys of value in the methodological systematisation, and how the theory can help to make the discipline more reliable in its processes, ensuring results based on the study of circumstances rather than from randomised, capriciously stylistic exercises.

Professional practice involves resolving problems related to the visual identity of companies and entities, by means of the methodologies of the graphic designer, as well as those conditioned by the needs or work processes of the client. By linking two very distant worlds, those of creativity and business, the activity becomes easily guided by business strategy biased towards market needs. In decision-making processes based on business dynamics, good practice is considered to be what works in the market; in economic terms as well as social repercussions. This is not entirely true, but predetermines that creative practice is a stylistic, aesthetic resource subject to its ability to generate economic gains. This in turn can lead to assimilating cases of business success as cases of good design practice. Consequently, methodological processes for this activity are increasingly being studied by professionals and becoming tools of reference for the sector, as much for brand strategists as the sector’s collaborators and interlocutors. Being a service subject to fees, not based on a "product", the result of which is known before it is acquired, but rather a result subject to a process of research, analysis, creativity and technical production, which produces a visual device, the client must verify and approve it.

The relationship between expression and interpretation is not always fixed and generic; that is, it falls into an area of relativity, and there are no stable certainties, they are interpretative certainties that the designer looks to resolve based on personal experience and that of the client. Many clients, in order to resolve this difficulty, resort to market research; this, from my point of view, has not been completely reliable since it is based on isolated interviews and taken out of context. Many times, the act of asking generates an obligation to respond; in a natural situation, we might speculate whether that person would have really questioned that aspect at a given time. On the other hand, as mentioned before, there is diverse academic literature that relates to research on the relevance of the expression of a trademark in relation to the preferences of a potential consumer. This reveals some interesting features, but I believe that it is a biased line of research since most of them does not take into account the environmental context, and the behaviour of the consumer/user is not
representative of a situation in a room, on a specific day, at a certain time. This means that it does not take into account a very important part of what ends up configuring the relationship between the issuer and its audience, the brand that it represents and the interpersonal relationship it has had with the potential consumer.

In addition, from a business point of view, and as Henderson & Cote (1998, p.15) indicate, trademark changes are especially difficult, due to the fact that managers have very little experience in this field, having confronted few modifications in their professional career. One of the results of an ill-founded practice is wanting to satisfy an interlocutor or interested group to the detriment of those who will be the actual recipients. The ideal situation is when the client feels satisfied with the result, knowing it is the best option for the circumstances that condition the perception and interpretation of the visual identity. Given that all the interlocutors in the decision-making process wish to be right, to determine what is appropriate and what is not, the two parties will interpret what is measurable and explicit.

Defining these theoretical aspects should help to stabilize what is measurable and change the perception of a random, erratic professional activity that stereotypically revolves around the "inspiration" of the author, to the perception of an activity with solid foundations. One that does not solve questions subject to the aesthetic tastes of the designer or the interlocutor, but which is based on the proven resolution of previously marked objectives through theoretical reasoning.

In accordance with this position, I have formulated the research question that should resolve the thesis: Based on research of a theoretical-practical nature, can we establish a stable methodological procedure for trademark design that will help to make the formal results obtained more appropriate?

Below, I will analyse the research question, in order to determine the meaning of each one of the concepts expressed within it, thereby also extracting their implications.

When I refer to theoretical-practical research, as I will analyse in the section on methodology, it is an approach to the research that combines the professional experience I possess with the research and reflective analysis of different authors on the subject. This enables me to contribute to the body of knowledge taking into account these two unique sources.
When I include the idea of a stable methodological procedure, it is to reinforce the idea of having to determine an ordered systematization of procedures to reach an end. Specifically, establishing a series of steps that fluctuate from the more generic, theoretical and strategic, to those of a more technical, formal and legal nature. This needs to be stable, so as to allow its application in the same order, for any of the cases the designer has to tackle.

Integrating the concept of trademark design in the research question is essential as it corresponds to the main disciplinary axis of the motivation for the thesis. It is a concept that alludes to the creative process employed by a graphic designer by means of design tools: typography, colour, form and image. Combined in a specific way, these must serve to create and legally register the visual identity device of an organisation.

Finally, I incorporate a fundamental, differentiating idea: the conception that this methodological process must solve not only functional and legal questions, but should also facilitate attaining a result consistent with previous determining factors. Factors that specify the characteristics of a transmitter that wishes to transmit a predetermined character, as well as those of receivers, who start from a passive condition, and that interpret the messages conditioned by integrated cultural conventions used to perceive the world around them.

**Significance of the research issue**

In the professional environment, the creation of visual identity elements for companies, entities, products and services, is part of a very specific activity within the discipline of graphic design. One of the aspects that motivates my professional approach to the discipline is the search for methodological models that solve a problem at the generic base of the design profession. While the problem goes beyond what the thesis can explain in the short term, it will go towards clarifying its function and relevance. Heskett (2005, p.1,) considers perfectly, yet not without contradiction, one of the main discussions surrounding professional matters: design represents the ability of human beings to create what differentiates civilization from nature, but in contrast design today is perceived by public opinion as banal and unsubstantial.
From a historical perspective, Martí (1999, p.32) reinforces this idea by contextualising it more in relation to the economy, stating that the genesis of design as a profession came at the time that massive industrial production was consolidated. The consequent triumph of industry caused a loss of contact between the craftsman and the user. There was a need for professional profiles with control and mastery of the relationship between technical and economic processes, as well as formalisation processes, establishing links between production and consumption, while sometimes acquiring an excessively technical role that relegated the intellectual thinking concerning these links. In short, the designer is an interlocutor that balances function and form. Heskett (2005, p.4) adds that the trivialisation of the term design is compounded by the evidence that there is no consensus on the meaning of the word. While much used, it is full of incongruities in its manifestations and lacking in thresholds that clearly define it.

We can consider that these problems may arise generically in the practice of the profession in a western setting. From my perception, this problem is compounded by the idiosyncrasy of where I carry out my design work. Given that my professional activity is mainly developed in the geographic area of Catalonia, it should be noted that my inscription as a professional is, until now, within the Spanish legal framework. I highlight this circumstance, since the economic activity of design was not recognised until 2009, when it was normalised by a European directive. Until then, the only affiliation for professionals was that of different associations, established mainly in Catalonia, and promoted by the professionals themselves. These acted as guilds, securing good praxis, defending their associates and recognising excellence by giving awards. Having been promoted by the interested parties themselves, and despite a vocation to disseminate their knowledge, they were not considered as professional colleges with facultative aptitude and consequently not recognised in the same hierarchy as other professions.

As indicated by González-Madrones (2016, p.298) in his thesis “Graphic design and its professionals. Challenges and definitions,” while at an economic level the profession is comparable with the rest of Europe, the professional qualification in Spain is not. In many fields, it is still linked to graphic arts rather than with scientific or technical activities. In addition, the Spanish state is not a uniform reality in this sense – the history of graphic design in Spain from the work of Satué (1997, p.12) will verify that the evolution of the activity has been unbalanced in its regions.
While Catalonia has been a leader in this sense, graphic design continues to be a disperse activity, lacking the same prestige it enjoys in Anglo-Saxon and North European areas; due to a commercial tradition from a historical background that favoured social and economic development. As González-Madrones (2016, p.27) indicates, the disciplinary field of design in Spain is disordered, inaccurate and diffuse, which, added to a lack of consensus, causes anonymity in both society and the administration, on a professional, economic and educational level. The Spanish case can illustrate why design is considered complementary. It is innocuous to bad practice, since it is not directly linked to the prejudice of society or public health, and therefore its specialist consideration is irrelevant, a position supported by political decisions of a more tactical nature, as opposed to strategic. It should also not be overlooked that, due to the problems expressed above, the professional area is not regulated by the need to hold an academic qualification. This opens the door to intrusion, which often aggravates the banal perception of design, and its real function, as a result of malpractice. This has led design to be damaged by an excess of form, in some cases, and a lack of function in others. If this problem is contextualised in the specialisation of logo design, it is heightened by the special characteristics of the activity – less subject to industrial processes that result in objects or palpable spaces with physical and technical requirements – that involves non-material interventions that, while apparently aesthetic, have the power to decisively influence public opinion.

Every creative process is subject to a process that is difficult to parameterise in terms of work methodology. Furthermore, when this process is offered as a service with an economic remuneration, uncertainty can be generated on the part of the client since, as stated above, it cannot be verified with objective criteria that what you have paid for will fulfil the objective of the commission. It is a significant task for designers to generate confidence, explaining what work process has been followed and how it validates the result being presented. Therefore, the way I theorise about processes where creativity intervenes can help consolidate this confidence.
Definitions

The study and design of visual identity devices that should be considered when designing a trademark reveals another problem; that of terminology. According to Chaves (1996, p.16), the existence of a denomination problem, a lexical vacuum, is very common in the activity of design. It is customary to use metaphors extracted from pre-existing material contiguous to the object to be named, more than creating new words. Hence, new uses are codified, thereby bestowing new meaning upon existing words. The author affirms that the language aspires to surpass a colloquial level and attain one of theoretical truth, at which point a series of ambiguities are encountered that cause misunderstandings – that which is obvious in spontaneous discourse loses its obviousness when put into writing. In addition, given the multidisciplinary nature of the semantic field, concepts not only originating from visual communication, but also from other disciplines such as history, advertising, marketing and management are mixed, as demonstrated by a series of ambiguities in the positioning of the different authors we have consulted. These writers, as Wildbur (1982, p.8) points out, in order to describe signs, come up against the difficulty of making relevant use of appropriate terms, since many of the words used, like symbol, emblem or logotype have a very broad meaning and are frequently used interchangeably. Conversely, in the field of communication theory, we come across the use of highly technical terminology, which in many cases are vocabularies created by the authors themselves. The fact is, as Gibbs relates (2011, p.7), it is very common in business, management and the design world to swiftly adapt and integrate all sorts of neologisms without thinking of the consequences. This practice causes terminology to continually evolve, and the meaning assigned to a term at the beginning of the century can be very different to its current sense. A factor that complicates things still further is that of language, since authors experiment in their own language, which adds to the lack of transversal denominations. These problems cause a lack of consensus in the use of a semantic field, which weakens the theoretical corpus of the discipline and consequently hinders the task of research. Consequently, before starting this thesis I will establish a specific position on the criteria for the use of terminology.
**Brand:** One of the terms currently used profusely to describe the creation of meanings around products and services is the word "brand".

In linguistic terms, the etymology of the word comes from an ancient root that has evolved over time. Long ago, it was a physical sign that identified territorial boundaries, the ownership of things, the origin of products or the social identity of people. Resulting from a territorial expansion of commerce, this sign, which was linked to an exchange of money or goods, added to the value of the merchandise, since a good reputation of a consumer product became connected to its brand. The Industrial Revolution became a key factor in the consolidation of commercial brands, given that amidst the plethora of offers they facilitated differentiation between products. In the present day, the business world and society recognize the importance of the branding phenomenon, causing the meaning of the term "brand" to take on a more holistic interpretation, representing the link and interaction that exists between the consumer/user and the product/service. According to Mollerup (1997, p.56), when trademarks are applied to products they become brands. Yet a brand is much more than a trademark, it is a product that includes its trademark, it is a name, a reputation and the atmosphere built around it. When speaking about brands, I use to talk about visual and conceptual aspects of product identity. Keller (2013, p.30) introduces an interesting nuance, the existence of a double meaning of the word, pointing out that the American Marketing Association (AMA) defines "brand" (in lower case) as a name, term, sign, symbol or design, or a combination of the aforementioned, with the function of identifying the goods or services of a seller in order to differentiate them from the competition. On the other hand, from the perspective of many marketing specialists, they define "Brand" (with a capital letter) as something more transcendental, as an entity that is recognisable, reputed and prominent in the market. Semprini (1995, p.48) supports this position, not differentiating in the use of capital letters but rather in the use of the article preceding the word, considering "the brand" to be an abstract entity, while "a brand" is something more specific; content that can be described, observed and analysed.

This content, Semprini (1995, p.48) adds, is the sum of the exchanges of discourse between the players involved, which takes it from an abstract notion to a specific, defined statement. Batey (2012, p.32-33) reinforces this idea by defining the brand as the interpretation and perception the consumer or user has about a group of associated attributes, benefits and
values, and as such "a brand" is a group of meanings, a soul, with an identity that distinguishes it and an image that resonates with its consumers, transcending its physical representation. Mollerup (1997, p.56) warns us that a distinction should be made between the use of the term when it is associated with a product from when it is associated with an organisation. In the first case, the use of brand is much more common, while in the second, the term usually applied is corporate identity.

Despite there being authors who consider a brand as a physical device that is represented in different ways, it seems that in the field of corporate strategy a brand is considered as an intangible entity, yet of considerable value when impregnated in the mind of the consumer. Given this duality, I should determine that, currently, it is a concept focused on defining a function more than a device of identity.

**Corporate identity vs. Visual identity:** It is also relevant to distinguish the relationship between visual brand identity and corporate identity, as some ambiguity in their use has been observed. Corporate identity refers to any aspect of the organisation that characterises a particular style. For example, it can define how the receptionist responds to calls. The visual identity of a brand only affects the way in which the organisation is represented visually. As such, it is an integral part of the corporate identity and, therefore, should reflect the general aims and aspirations of the organisation (Miles 1989, p.46). In this sense, Olins (2008) points out that, as almost everything related to the world of brands, the terminology is in a state of flux. Up until the 1980s, a "brand" was a consumer product found on the shelves of a supermarket, which only concerned one audience of the organisation; the client. When organisations had the need to communicate with all their audiences, the term "corporate identity", which corresponded to "The tangible manifestation of the corporate personality", began to be used, as did "corporate image", which corresponded to "that which all the entity’s publics perceive of the identity that had been created and projected". Today, however, Olins (2008, p.21) claims that the tangible manifestation of corporate personality is called a "corporate brand". He confirms the previous argument – the word "brand" has more relevant economic connotations than terms such as "identity", "image" and "reputation". Accordingly, I can consider them as terms that do not define the devices themselves but rather, as in the case of "brand", define a strategy that aims to generate a state of opinion regarding an organisation.
**Brand identity, Brand elements and Visual equity:** Keller (2013, p.142) introduces the concept of "brand identity" as those characteristic visual features that identify the personification of the brand, and "brand elements" as those devices that configure the "brand identity", which can be registered and used to both identify and differentiate it. The main elements are brand names, logos, symbols, letters, jingles, packaging and signage. Lightfoot and Gerstman (1998, p.53) to name the same idea have coined the concept of "visual equity" that, according to the authors, derives from the idea of "visual form", the "look & feel" of the brand. Bottomley & Doyle (2006, p.63) point out that "visual equity" contributes substantially to the brand's recognition, making it stand out among its competitors. It has also been observed that many authors who use composite forms to define the brand elements specifically as "brand name" and "brand mark".

**Logo vs. Logotype:** Another conflict that I detected among different authors is the profuse and confused use of "logo" and "logotype", etymologically they are connected, but as with other terms analysed, over time their meaning has varied and been embellished. The etymology of the word "logotype" comes from the Greek "logos", meaning "word" (Gibbs 2011, p.7; Slade-Brooking 2016, p.24), and I can deduce the origin of its use in visual communication with Gutenberg. Gutenberg, as Costa (2017, p.16-18) argues, in order to break with the standardisation of mobile types, devised ligatures from Latin – such as "st", "tpe", "pba" and abbreviations – proprietary types that joined together pairs or three letters, thus meaning a certain saving of time when composing the text block. These became something different to type, as they were, in fact, fragments of "words." These fragments of words (logos) Gutenberg decided to call logotypes. As the graphic industry evolved, it became more technological and a key factor in the promotion of commercial products, which required their own names with a visual personality different from the others. Hence, typographers began to cast commercial names by adding aesthetic and expressive values, following the model of the logotype set by Gutenberg. Gibbs (2011, p.7) in the book Symbol: The reference guide to abstract and figurative trademarks describes something very relevant regarding the interchangeability of the word "logo" and "logotype". The word "logo" began to be used in the 1930s as a short, elegant form of "logotype" – therefore, over a period of time both words meant the same. The author notes that
today the meanings are different, since the word "logo" is used in a more generic and diffuse way. There are authors (Henderson and Cote 1998, p.14; Starling 2011, p.XVI; Beirut 2015, p.178; Slade-Brooking 2016, p.24; et al.) who argue that a logotype no longer has to include words, or it may be the sum of a symbol and a logotype. Gibbs (2011, p.7) highlights that the consolidation of the new meaning of "logo" has relegated the term "symbol" to a subsidiary definition of "logo". Before, the idea of a graphic symbol was simple: it was a term used for any visual device that denoted identity, recognition, ownership or affiliation. Now, however, "logo" has occupied much of this space, while "symbol" means those abstract or pictorial graphic devices that represent the essence of an identity. In this case I find myself in a difficult situation to determine a clear and concise position on the use of "logo" and "logotype", given that from the authors I have analysed, some use "logotype" like Starling (2011) and Raposo (2012), to name any device, others use it to define a device expressed in letters but that contains added elements, such as lines, or backgrounds with a certain silhouette to provide more expressiveness like Carter (1999) Chaves and Bellucia (2003) Olins (1989) while others like Hollis (1994), Doyle & Bottomley (2002) consider it to be a purely typographical expression.

Other devices: As we have seen in a typological approach to trademarks, I discover a series of devices of visual identity that have been created throughout the history of human culture to serve different uses and needs. Gibbs (2011, p.7) highlights that many of them, such as "Crest", "badge", "seal" and "emblem" can be considered symbols from particular areas of identity such as heraldry, correspondence and engraving. While others, such as "signature", "totem" and "icon" are names for symbols from other areas such as personal identity and religion. The author also points out that there are words of a more technical nature that describe a type of symbol, such as "monogram", "logogram" and "pictogram", as well as symbols of craftwork such as "hallmarks" used as "trademarks". Consequently, taking a look at the history of symbol design and the versatility offered by the term "Brand", the author indicates the reason for this context of multiple, changing definitions.

Trademark: While copyright laws establish the rights and responsibilities related to works, according to Lutzker (2003, p.83), trademarks deal with the subtle scope of words, names, phrases and
symbols, and unlike the former they are distinguished by their brevity. These linguistic and visual elements are the legal guarantee that certifies a specific origin and establishes a qualitative reputation. Additionally, they facilitate the establishment of a relationship in people’s minds between a particular offer and the devices of visual identity that represent it. As stated by Fogg (1998, p.72), the Trademarks Act of the United Kingdom of 1994 is defined as "any sign capable of being represented graphically which is capable of distinguishing goods or services of one undertaking from those of another undertaking. A trade mark may, in particular, consist of words (including personal names), designs, letters, numerals or the shape of goods on their packing." They emphasise that the trademark ends up performing three functions: distinguishing the goods or services of one company from others, indicating the provenance or origin of the goods or services, and also serving as an indication of constant quality (albeit good or bad). As Lutzker (2003, p.90) emphasises, the most important feature of a trademark is that it represents a unique source and, whenever it does, can be protected as a monopoly for its owner in relation to the specific classes of goods and services that are actually associated to the brand. However, when it is not protected, the brand is meaningless as others may appropriate its acquired value. For that reason, the author points out that trademarks become key to marketing processes as they link visual identity devices with the information available to consumers to help them make decisions, and that choosing a trademark is a way of choosing from who, and what, a product or service is. Slade-Brooking (2016, p.24) adds that this legal system allows organisations to take legal action against the unauthorised use of their device or something that attempts to look like it.

Lutzker (2003, p.94) warns that an important limitation on the use of trademarks is geography, since the owner of the mark only has the right to protection in the geographical area where it has been registered. In an increasingly globalised environment, it is essential to have international regulations that guarantee effectiveness. The World Intellectual Property Organization, which is a United Nations body with 191 member states, is the world forum for services, policies, cooperation and information in the field of intellectual property. According to the organisation (2016), its mission is to take the initiative in the development of a balanced and effective international intellectual property system that enables innovation and creativity for the benefit of all. So, I can consider it as the foremost global authority in defining what a trademark is, and what the
elements can be to compose one. In the document "Making a Mark: An Introduction to Trademarks for Small and Medium-sized Enterprises", a trademark is a sign that identifies and distinguishes the products of a company, in the market, from those of other companies. The products it identifies can be goods or services, and any sign capable of distinguishing them can be used, such as words, names, letters, numbers, drawings, images, shapes, colours, labels or any combination of these.

Proposal of semantic field

Having read several authors who have assayed the discipline, I have verified that the terminology is unstable, fluctuating between terms that change in meaning, resulting in certain inconsistencies and disparate criteria regarding their use. In order to establish principles that do not defend any position, but rather seek to find those terms that semantically have more acceptance among authors, and that specialised dictionaries on design terminology indicate are correct, I will set a criterion for the use of terms in this thesis, presenting a semantic field and the different lexical fields that categorise the words used.

![Semantic field and meronymic relations chart](chart.png)

**Figure 1.1.** Semantic field and meronymic relations chart

As seen in Figure (1.7) the proposed semantic field is divided into a series of meronymic relations, from the function of the devices up to their
legal effectiveness. In order to avoid confusion, the term "brand" is defined as a word that describes the function visual identity devices perform by creating a meaning around a product or service. It can be expressed on a semiotic level, moving on to the first relation of meronymy, as a visual sign or a verbal one, both fulfilling a communicative function; the first as an identifying signal and the second as a name, so that it can be named and used in spoken language. In the fourth column, we find the meronymic relationship that corresponds to the term given to each of the representations of the signal or name. This section comprises all those visual expressions that have been formed throughout history, understood as either symbolic expressions or lexical ones. The fifth column contains complex compositions, also from history, but which mix both forms of expression. The penultimate column contains terms that correspond to language belonging to the discipline of graphic design and that bestow upon signs a determined function in the construction of the visual communication that gives meaning to a brand. These terms are the basic elements expressed in the template of grammatical construction for the visual identity of a brand (figure 2.1.). Finally, the last column comprises the term that defines the legal record, in other words, the right of ownership of the relationship constructed between the sign and its meaning to an owner who leverages its acquired value.

Terminological positioning of the thesis

Once the terminological issues surrounding the standardisation of these devices have been analysed, a differentiation needs to be made between the terms that refer to a particular standardisation and those that define a specific function. Those terms capable of representing the semantic field more hierarchically will be most valid for the thesis. These are the words "brand", "brand mark" and "trademark". The most appropriate term is "trademark", as ultimately it refers to devices that are legally protected, thereby useful for the creation of "brands", those devices that, according to Werkman (1974, p.1), can be created with standardised compositions of verbal signs, visual signs or a combination of both. So, whether we say "logo", "logotype", "Crest", "badge", "seal" or "emblem", "monogram", "logogram" or "pictogram", if they belong to an individual, a group or an organisation that would not want anyone to supplant them, they could all become trademarks. On the possible use of the term "brand" instead of "trademark", WIPO states the concepts should not be confused,
since the former has a much wider meaning, as set forth above, referring to the visual, emotional, rational and cultural property that consumers associate with the organisation or the product. "Trademark", on the other hand, is one of the vital elements of "brand", which also encompasses other complementary graphic elements, slogans, sounds and other elements connected to its concept, image and reputation. Additionally, WIPO concludes that a "brand" may have different trademarks associated with it. Also worthy of note is that WIPO classifies brands as those composed exclusively of letters, words, numbers or a combination of these, those that are stylised versions of a word, those that are purely figurative expressions and those composed of figurative elements and words combined. Fogg (1998, p.73) points out that from a legal point of view, the degree of distinctiveness is the most determining factor; the more distinctive it is, the more likely it is to be legally available and the more rights it will be able to obtain. Therefore, not only is it a term that can include any device, but it is implicit in the methodological process of its design.

To close this section, it is essential to adopt a position on the use of a single term to move forward with this thesis. Since there are authors who use words in a contradictory or diffuse way, which can confuse in the advancement of my position, when an author refers to a device of these characteristics I will always transcribe the word "trademark", given it is synonymous with the intended meaning of the author.

Method

One of the main causes of the diversity of methodological approaches in the field of graphic design is the lack of an academic approach that has been able to sustain a theoretical-practical sea within the discipline and its specific activities. In 1995, I began my teaching activity thanks to my professional merits. Since then I have been transferring the concerns expressed above, all of them experienced in my professional activity, into the academic sphere, trying to set and argue methodological processes focused on approaches to a project. A vision focused on the suitability of the solutions provided to the requirements of case-by-case positioning and the perception of the receiver, and not on a stylistic positioning. A vision which has become an attempt at a
theoretical corpus of the discipline of trademark design. We can therefore consider that the spirit of this thesis is based on a primordial need to take an in-depth academic look at those questions that professional practice and teaching experience have not been sufficient to cover in an academic dimension.

I believe that this dimension lies in the connection between knowledge based on professional experience with that based on a theoretical approach. Without this dimension, knowledge would remain unchanged with respect to the past and we would continue to be subject to the profession and formalism. From this approach, Zabolotney (2017, p.27) consolidates the idea, stating that design is often based on conventions about what it attains and how it contributes to culture, and that as designers we cannot change if these conventions remain immutable. Therefore we can affirm that this dimension should also certify that the knowledge is produced in an accurate, contrasted way, while taking into account the interaction with determined surroundings. A way of working, as Ariza (2013, p. 13) points out, which lies in an inquiring process, where its characteristics and project nature allow us to appreciate that once an idea has been shaped, it furthers the knowledge. If we only carry out research with an emphasis on theory or, on the contrary, fully weighted towards practice, we will be limiting ourselves when carrying out integral proposals where there is a veritable balance between theoretical reflection and practical skills.

One of the main impediments to achieving this objective is related by Vaughan (2017, p.11), indicating that design, as an area of professional practice, is relatively embryonic, as well as its inclusion in universities. Ariza (2013, p.2) further adds that this inclusion has contributed significantly to rethinking the theoretical-practical prescription in the education of designers. He also emphasises that this binomial will not only balance the project process in the exercise of the profession, but will also prompt rethinking the concept of research. The author justifies this by arguing that if a practical approach is valued as an essential part of the design process, it means that designers educated in this binominal system when carrying out their activity will generate a certain knowledge from practice. Therefore, we can understand that rethinking the concept of design research should not be limited to the training of future professionals, but should also allow them to be integrated into research studies. The very reason for this thesis lies in this spirit and, therefore,
must integrate the theoretical-practical approach to the methodological process to respond to the "research question".

Nevertheless, Vaughan (2017, p.11) and Friedman and Ox (2017, p.515) warn us that although this type of doctoral design programme has been running for more than twenty years, in academic terms, the theoretical-practical approach remains a relatively nascent methodology that generates some debate. In addition, as an activity integrated in higher education, it must resolve the question of what is the most appropriate model to implement.

I consider it important to delve into further detail with respect to this debate, as gaining an overview of the relevance of this method can help to focus a methodological proposal for this thesis. Friedman and Ox (2017, p.515) affirm that this debate is based on the transformations higher education underwent, both in the United Kingdom and different countries in continental Europe, when polytechnic schools of design and art gained the status of university centres. As the authors state, as these changes took place, many universities began to question academic standards. Vaughan (2017, p.11) indicates that until then, design was under the auspices of other more established academic domains like architecture, art, humanities and engineering. This situation implied the appropriation and application of other structures and disciplinary methodologies to generate knowledge, only capable of giving rise to academic production in the historical field or, as we have mentioned in the Research issue, the review and empirical analysis of applied design. This question leads me to confirm a possible cause of the cleft between a theoretical approach to design and a practical one. Namely, the lack of a specific research model to solve the conditions of an activity subject to a continual creative process which also depends on practical verification. In addition, according to Ariza (2013, p.14), it is necessary to evaluate the content of design; the creative aspects and the indicative, symbolic and aesthetic-formal functions, as essential parts of the discipline. Vaughan (2017, p.11) supports this idea by adding that the right circumstances are already in place for design to support the articulation of its own methods and ways of undertaking, disseminating and applying this dual approach, and which has already begun to be known as practice-based research. Candy (2006, p.2) defines this type of research, not exclusively found in doctoral research programmes, as that carried out by professionals who incorporate practice as the focus, giving rise to new concepts and methods for generating original knowledge. The same author warns, however, that
it is important to make a clear distinction between practice-based research and pure practice, as many professionals would say that they are carrying out "research" as a necessary part of their everyday practice. Scivener (cited in Candy 2006, p.2) distinguishes it by saying the difference is that practice-based research aims to generate culturally new concerns that are not just new to the creator or individual observers. Friedman and Ox (2017, p.518) define it as research that transcends the internal or physical world of the individual researcher, and that impacts as an original contribution to the knowledge within the field. The authors specify that research should create knowledge for researchers and information for the field, and when other members of the field integrate this knowledge, then it becomes knowledge of the field. Vaughan (2017, p.10) calls this profile "Designer-practitioner-researcher." Professionals who, in order to continue their activity in a more informed and effective way, require the results of field research. This articulation of words does not necessarily have to follow this order, but the profession should be considered as the epicentre of the selection. These professionals, according to the author, must demonstrate the technical skills and knowledge in their actions and the dominion of their activity, accepting that despite being subject to certain norms in practice, there are infinite variations. The ability to work on these variations, to be able to transform them, should be the objective of researching the practice and generating knowledge. Vaughan (2017, page 12) also states that while being a designer with design experience is the basis for becoming a practitioner-researcher, increasingly, the inverse cycle has become valid. Many Ph.D. graduates choose to work in practice, as industry is increasingly offering prospects of innovation, and as a professional profile, these graduates are perceived as advanced workers capable of dealing with issues of great complexity. This reveals that the current situation responds to the way in which the production of knowledge has gone from being considered a closed academic system to an open one, on the network, sensitive to its environment and, consequently, in expansion. In this regard, Zabolotney (2017, page 19) states that while designers with bachelor’s and master’s degrees develop their practical design activity within well-established relationships between design and business, engineering, manufacturing, etc., PhD students, on the other hand, are well positioned to articulate their own knowledge of design and how the activity is contributing to changing their environment. Using communication studies as a model for design work, and providing access to other areas of knowledge, will allow
them to challenge economic, cultural or political structures. According to Vaughan (2017, page 14), this transition is one of the deeply significant results of doing a research degree. Developing a framework and the ability to participate in critical thinking about practice, while also practicing, is one of the transferable capabilities of a graduate that embraces the expectations of the university with the professional world. Therefore, as Macleod and Holdridge (2005, p. 197) noted, to undertake a practice-based degree in research, the doctoral student must justify, describe and reveal the nature of the body of work to be examined. Consequently, the student should offer a methodology that demonstrates the previously articulated theory, or a theory which is articulated by the work itself. Therefore, the content must be revealed through a dual presentation of the writing and the result of the practice, as related objects of thought. Candy (2006, p. 2) coincides with this position, while adding that a thesis arising from a practice-based research process should show evidence of original academic work and must contain material that can be published or exhibited. As the author mentions, this theoretical-practical approach may not move away from the precepts established for any other doctoral approach, and hence must follow the three key aspects defined by the Arts and Humanities Research Board (AHRB, 2000) in terms of the requirements that any doctoral investigation should fulfil:

- Define a series of research questions or problems that will be dealt with during the course of the investigation, as well as what the objectives are to generate knowledge and understanding of the problems to be addressed.

- Specify a research context, the significance of addressing these issues, what other research is deepened, and what the contribution of the research will be to the knowledge of the field.

- Specify the research methods to address and respond to research questions or problems. In the course of the research project, you must show how you want to answer the questions or advance the available knowledge and understand the problems. It should also offer a justification of the chosen research methods and why they provide the most appropriate means to respond to the research questions.

At the same time, Rugg and Petre (2004, p. 6-7) also establish the skills that a candidate must demonstrate: the proper use of academic language; knowledge of existing literature; knowledge of the main research methods and theoretical lines of the discipline; and to
demonstrate the initiative to develop all the previously mentioned skills independently.

Having reviewed the discussion on the most appropriate methodology to develop this research work, as well as the skills and abilities I will have to demonstrate in the course of this thesis, I have to define my own position as to the process I will follow. A process to establish a research project that includes the development of a practical process with a parallel reflection on the reasons that are taken into consideration to make certain formal decisions. As a specialist in the field, I could justify my own experience as a reflection base, although I consider it will be important to validate, review and reflect on existing literature regarding different aspects. The first of these is a historical one. As we have seen in the definition section, many of the terms we use, sometimes erroneously, are nouns that have roots in the cultural development of humankind. Therefore, I believe it will be important to investigate the origins of trademarks, the contexts of their evolution and find out if a classification of their variability can be compiled and ordered. Secondly, and as the main study, I will analyse the different methodological approaches applied to trademark design. To do so, I will review existing literature produced by designers or specialists in the field. This phase should allow an understanding of the problems and limitations of this literature. In the same vein, I deem it important to also consider the literature produced by authors belonging to areas surrounding design, such as marketing and brand management, as they may include more general and contextualised visions from the business and commercial management environment where these devices are developed. Thirdly, legal literature concerning the precepts to be considered in the design and registration of trademarks should be appraised; as we have seen in the definition section, this can significantly influence the design process. Consequently, the thesis should focus on the methodology that considers the evolution of trademarks over time, their relationship with society and, as designers who manage their expressiveness, to consider increasingly demanding, complex approaches.

Accordingly, from the study of these three fields of reference, I plan to define a first methodological process of action as a basis for the work. Given the theoretical-practical nature of the work, I will test the process by developing a real case that is relevant, due to its complexity and representativeness, and also capable of being exemplary and therefore
applicable to other cases. In order to carry out this process, I believe that the phases of work should be continually validated with the reference sources studied in the first phase. This process must lead to those questions that become theoretical principles capable of enriching the field of knowledge surrounding trademark design. Specifically, in establishing an academically supported reasoning that justifies a stable methodological procedure to align a proposal resulting from a design process; in terms of appropriateness as defined by the project, as well as what its audience will eventually perceive.

I believe that the practice-based approach that this thesis proposes to articulate is appropriate in terms of solving the research question, as on the one hand, it needs to establish a focus on the methods used in the professional practice of graphic design, and on the other, it requires theoretical verification of whether this practice is appropriate according to a consistent argument, as is the case for an academic one. An argument that should seek an approximation not only to question the methodological conventions assimilated by designers, but also to respond to the lack of a disciplinary consensus, thus giving rise to new concepts that can generate an original contribution to knowledge of the field.

Thesis Structure

The thesis is developed in six chapters, three of a theoretical nature and three of a practical one.
As you are reading, in the first chapter, an introduction to the subject from different perspectives is considered. It highlights the factors that have led to brands having acquired so much relevance today. Also, how visual languages that brands adopt grant a trademark the highest hierarchical representation. It explores what functional conditions a trademark must fulfil in order to be effective. This question also led to the detection of a terminological problem, which required a position to be taken in this regard. The chapter ends by speculating on the validity of the theoretical foundations in the design of these devices, from an educational, academic and professional perspective. This question derives from the main motivation for the thesis, aiming to provide a methodological approach to the design of trademarks.

The second chapter considers a historical approach, taking a closer look at historical roots to identify certain formal traits from the past and whether certain combinations between the verbal and visual sign can be identified as responding to past needs, but which have become established conventions in contemporary culture. It also explores various methodological contributions of different authors, comparing coincidences of criteria and grouping them into a methodological synthesis. While there is a consensus regarding functional aspects in the synthesis, this is not the case for aspects that determine the suitability of a trademark design according to the positioning of the brand it represents. At this point in the work, the conclusion from the reflection made is that the suitability of the type of combination between the visual and verbal sign should be appraised in the process of designing trademarks. It is observed that in the processes of visual categorisation of offers that concur in a product or service sector, the use of a certain identity device can provide benefits, not only of aesthetic identification, but also of function and meaning. Consequently, this issue leads to a research question: if appraising the formal typology of a trademark can be included in the decision-making process of its design. To answer this question, three practical approaches are anticipated: integrating this appraisal into the development of a case study, stabilising a formal classification and order of trademarks, and producing a system to evaluate the presence of a certain typology in the formal visual expressions of trademarks, according to the sector where they are situated and the characteristics of their positioning.

The third chapter details the project to redesign the trademark for the Universitat de Barcelona. Following the methodological synthesis set
out in the previous chapter, the entire project process is explained, which integrated the typological appraisal of the trademark from the historical perspective of the institution as well as from its sector. It determines that there are certain types of combination between the visual and verbal sign of more relevant use. It is therefore concluded that some styles are more pertinent than others and this consideration is integrated into the design process.

The fourth chapter deals with fixing a classification that organises the types of relationships between the visual and verbal sign adopted by trademarks. A critical review of classification tests carried out by different authors is made, evaluating those values that could be integrated into the new proposal. Aside from a new classification proposal, a characterisation matrix is also presented.

In the fifth chapter, an online tool is developed, which allows the suitability of a given typology to be parameterised according to the positioning of the brand it represents within a hypothetical competitive environment.

Finally, the last chapter presents the conclusions of the thesis, from both a theoretical and practical viewpoint, denoting which contributions are considered relevant. It focuses on the applications the thesis could provide with respect to the practice of graphic design as well as for other disciplines. In addition, it indicates those aspects that need improvement and makes recommendations for future lines of research.

**Summary**

In this first chapter, I have introduced several important aspects to understand the relevance of this thesis. At the beginning, I have analysed how various authors claim that brands, and the devices that represent them, play a very important role in the development of communication between organisations and their audience. These relationships are established by applying different strategies, such as those related to management, marketing and aesthetics. Designers have a fundamental role in the construction and aesthetic projection of organisations. Visual identity devices acquire substantial value as they become the signatures that represent these organisations at the first hierarchic level. However, from the practice of design it is difficult to perceive a consensus when establishing a methodological process that guarantees the
appropriateness of these devices or in defining a semantic field. Consequently, I have wondered if this research project can clarify these issues. Such clarification could mean ensuring professional practice is more grounded, more reliable and ultimately more standardised. From a terminological perspective, the semantic field in which these devices are related has been established, as well as the relevant terms and their appropriate uses. As a consequence of this analysis, I have determined that the term "trademark" is valid, as it converts an identity device into a legal reality, conditioning the methodological process and making it effective by securing ownership, together with the benefits that may generate. I have also considered the complexities and deficiencies found in the domain of trademark design, and how the practice-based condition of this thesis can provide solutions combining a theoretical approach with design practice.

In order to advance in this direction, the following chapter will analyse existing literature regarding the historical and evolutionary condition of brands, their characterisation, as well as processes and methodological criteria in trademark design. A series of questions that help contextualise some of the factors a designer must consider before developing a formal solution.
2. Literature review

This chapter must contribute to an initial methodological stabilisation, based on the literature consulted and personal experience as a professional within the discipline, concluding in a refinement of the research question that leads the way to generating new knowledge on the methodology of trademark design.

To manage the visual identity of a brand from a graphic design perspective, it is not just understanding it consists of basic and complementary elements, but also how they are interrelated, how they constitute a visual language and what the process is for receiving and constructing the meaning of the brand they identify.

Visual brand expression and impression patterns

Given that the main role of a brand is to create and spread a universe of significance around a social object (be it a product or service), the brand must be, by definition, a semiotic instance, a machine that produces meanings (Semprini 1995, p.50; Batey 2012, p.156). As Batey points out, (2012, p.289) the construction of these meanings is not an immediate process; at first the elements of visual identity lack meaning for consumers. Despite contributing to the brand’s meaning, to begin with, these elements (and by extension the brand too) do not have a real meaning. In terms of meaning, the brand is yet to exist. As consumers find out about the product and gain experience with it (buying it, using it, talking to friends about it, seeing its advertising), the brand’s meaning begins to form. By not being of natural origin, but rather a cultural product, and essentially a discursive reality, it is compelled to constantly reaffirm its existence and presence (Semprini 1995, p.60), reaffirm the associations it provokes, the brand’s “emotional charging” (Cheverton 2007, p.21). Batey (2012, p.31) defines these contacts as brand engraving – the process of forming a group of associations that influence brand perceptions and an associative network to understand and interpret it. A relationship based on the perceptions and experiences felt every time the brand and its interlocutor come into contact (Aaker 2014, p.13).
Schmitt and Simonson (1998, p.72-73) argue there is a parallel between people’s relationships and those between consumers and organisations or brands, based on the idea that the terms “expressions” and “impressions” form. These come from the theories on human perception of people, formulated by sociologist and social psychologist Gustav Ichheiser, which accurately express how we judge people in our daily lives. We perceive their outward expression, that which they project, such as their facial expression, their appearance, their visual expressions, the friends they have chosen, etc. Yet it can be assumed that all these expressions are related to something more, a "private ego" comprising the character and personality of the individual, his or her beliefs, feelings and intentions. It is argued that companies, being entities with a social behaviour, have the same model of perception as people, the authors state that “a useful analogy in perception is that companies have multiple groups interested in them.” Customers have no direct knowledge of a company’s culture, mission, strategy, etc., the “private ego” of the organisation. What they perceive is the public face of the organisation or the brand – its expressions. This public face is projected through multiple elements of identity with various aesthetic styles and themes. The identity is normally never appreciated in its entirety, but rather various perceptions are integrated into a general impression that customers form in relation to the company or its brands.

In projecting visual identity, the programming of this emission and reception process is extremely important. The expression should be managed to ensure the impression is that which is intended. Inherent in the nature of communication processes is the existence of elements that interfere with correct reception, which is why the clearer the communication that reaches the receiver, the more comprehensible it will be. Expression formalised in two categories of basic and complementary identity elements, that together make up visual language, have to be rich in grammatical construction, with enough components to combine with each other, so their composition criteria can be systematised and normalised, while being coherent with the positioning and conventions of interpretation accepted by the recipient. According to Chermayeff & Geismar (2000, p.6) adaptability is extremely important for an identity to maintain its vitality and relevance over time. Hence, its visual language has to be flexible, ready to evolve many times, and in unpredictable ways. The question is how to balance the need for adaptability with that of
consistency. The order of the elements that compose the identity must be governed by a logic that organises them into a hierarchy – the most important being symbolic and constant – as well as determining which are complementary or accessories.

Thus, the process of receiving, understanding and recognising the brand is based on the interpretation of this hierarchically structured language and governed by codes and systems of interpretable signs.

![Hierarchy of Graphic Codes](image)

Expression pattern for brand visual grammatical construction. Design hierarchy components. Own creation.

Figure 2.1. Expression pattern for brand visual grammatical construction. Design hierarchy components.

All of these contributions enabled me to interpret a construction template for the visual identity of a brand; formed from expressive intentions that should culminate as an impression to the recipient. As indicated by Olins (1978, p.172), whether a large or small task, complex or simple, the designer has to develop not merely a symbol and a few colours, but rather a visual system comprising graphic elements that can be composed in various ways and that allow the organisation to express its ‘looks’ and develop visual discourses with different tones of voice. The structure that I propose (fig. 1.1) draws up a vertical hierarchy of graphic codes that goes from those specific to the organisation to others more generic, and from those that are more significant for being recognised to those that are less representative and function as an accessory.

It goes from those symbols that hold the highest hierarchy within the scheme of recognition, to those that are generic. I also present that the construction of visual language is defined by three stages: what we
consider to be the visual identity of the brand (the components of the system); the brand language (the theoretical systematisation of the composition of ingredients); the brand communication (the systematisation of the composition of the elements in different means of communication). These will depend, to a large extent, on the communication processes implicit in the activity that each organisation develops. They can have a particular bias when the activity involves dealing directly with people, such as public relations or clothing, and even those that are merely physical supports, identifying the organisation while its activity is developed, such as signage systems, application of the language in commercial centres or on vehicles that carry out the logistical part of operations. It is about disseminating visual language in a way that, as Schmitt and Simonson (1998, p.155) highlight, a series of prototypical expressions are repeated so that they are recorded in the minds of consumers. These, as they indicate, tend to be swiftly incorporated into the memory. The theory of "expansive activation" is the principal theory about memory in the study of psychology and consumer behaviour. When a person thinks of a concept, this thought activates a node in the neural network that, concurrently, activates other nodes. With repetition, the connection paths become well-worn routes and their node (for example, the name of a brand) easily activates certain parts of the network, certain thoughts, especially if it reflects a topic with multiple associations. That is why the structure of reception for visual identity, what we call the impression, is constructed in the opposite way to that of expression (fig. 1.2), in a way that the receiver captures these prototypical expressions and from the expansive activation starts constructing an order in the mirrored form previously expressed. Unlike expression, impression perceives these prototypical expressions through means of communication. Hence, the receiver initiates the reading process by distinguishing the visual language from the written, identifying what the expressions are and what they represent in each case. Under this process, and as a result of repetition, the grammar of this language will start to take root and be understood, enabling conclusions to be drawn regarding which elements command ownership of the message, whether written or visual.

At the same time, the brand, as a semiotic motor (Semprini 1995, p.47), will accumulate a meaning assigned to a signifier, and establish relationships in the denotations and their connotations.
If the programme focuses on achieving this effect it will obtain, as Starling (2011, p.218) describes, one of the most powerful qualities of a trademark: once we have made the link between it and its attributed meaning, we will instantly retrieve the message subconsciously, forging the control of this link. Consequently, the identity of the brand will be formed over time as the connections are consolidated, at which moment remembering the brand will require no more than seeing the trademark (Aker 2002, p.84; Cheverton 2007, p.21). This means trademarks have become much more than a way of differentiating products, they have become endorsements, indications of quality, values, trust and origin. They have developed into the key that allows consumers to recognise products, services and organisations in a fast, effective way (Murphy et Rowe 1988, p.7; Cato 2016, p.5). This phenomenon, as pointed out above, reinforces the idea that trademarks are very valuable today, as they facilitate communication processes in environments of strong competition. Starling (2011, p.67) exemplifies how our perception of offers of products, which seem virtually identical, can change the moment we discover the trademarks that identify them. According to Costa (2004, p.18), brands work as dual signs; on the one hand they are verbal signs, and on the other visual signs. The verbal sign corresponds to the name, this being what enables the brand to circulate among people as well as through them – Costa arguing that which cannot be named does not exist. In contrast, the visual sign, formed by the trademark and the visual language, is the way in which the verbal sign is stabilised in space – by materialising – given that the sonic sign is volatile and immaterial. In some cases, this duality has reached an optimal level, as in the case of Nike’s “swoosh”, Apple’s apple and the seashell of Shell, among others, which have crowned the zenith of the semiotic process, having obtained
the powerful effect of not needing the formalisation of the verbal sign to be recognised (Matusitz & Cowin 2014, p.101). However, the authors themselves acknowledge that the evolutionary nature of this process requires the brand to first be known with trademarks that combine both the verbal and visual sign. As Buck (1916, p. 59-62) emphasises, in this process exposure will be a fundamental factor in having a mentally, well-defined visual sign that represents or evokes the organisation. When this process reaches the point where most receptors are familiar with this duality, then they are able to dispense with the verbal sign.

Accordingly, from a formal viewpoint, the trademark acts as a device that comprises a verbal sign – words – and a visual sign – symbolic elements – that take different structures and can be standardised with certain colours and sizes, and which can also relate to accessorail graphic elements. This device, as many authors agree (Walter-Thomson 1911; Buck 1916; Werkman 1974; Baer 1976; Olins 1978; Rand 1993; Hart & Murphy 1998; Chermayeff, Geismar & Geissbuhler 2000; Lutzker 2003; Wheeler 2006; Shumate 2015; Cato 2016; et al.), can be formalised in many ways: from the simple combination of text and symbol to more complex compositions such as shields, monograms, seals, letterings, calligraphies, typographies, as well as combinations of these elements. To understand the various anatomies trademarks adopt, we must analyse their origins.

**Typological approach to Trademarks**

The origin of the term "brand" in its contemporary meaning is relatively new (Pavitt 2000, p.21), yet its existence is not recent and its raison d’être has evolved together with that of human culture and society. Müller-Brockmann (1988, p.9) defends the importance that visual communication has had on human ideas, conduct and civilization and how, increasingly, visual communication has been replacing oral communication.

In our endeavour to find the easiest possible way to communicate through an association of ideas, humankind invented the symbol. And, as humankind is fundamentally economical, over time it has been refining and amplifying the symbol in pursuit of its own selfish interests (Buck 1916, p.36). Symbols are immensely powerful; for fixing ideas in the mind they act as triggers that work much faster and more explosively than...
words. Many symbols are, as Jung and others point out, an intrinsic part of humankind’s vocabulary of expression and understanding.

Symbols are able to unleash the most complex and profound emotions (Olins 2008, p.30-31). Symbolism is intrinsic in the fabric of our society. In fact, it has been indispensable in the organisation of civilised society, facilitating expression and communication (Whittick 1935, p.1).

Elkins (1999) in the book The Domain of images defined the study of symbolism that has no religious or artistic purpose as the study of "images that are not art". Although all images carry a communicative charge, their main function throughout history has been to transmit information; motivated by complex relationships and via different reception processes. While artistic images have been changing their meaning continuously, in accordance with reception contingencies and historical circumstances, "non-art" images have been even less stable, depending not so much on similarity but rather interpretive virtues that could easily be lost over time. Elkins establishes a classification formulated in seven categories, ranging from representations expressed exclusively as ornaments, sometimes almost imperceptible in drawn or printed typographical characters, to the other extreme of those containing images, writing and notations in the same ensemble. As the author states, in the category he calls emblems, (which we now refer to as emblems, comprising images with an explanatory text), without the text, the image would be incomprehensible, the two must work together in order to make sense. Among the many examples of emblems are trademarks, appearing on every object we own, from t-shirts to televisions. They are based on an unstable interaction between images and texts that, at least for a moment, are unintelligible. This indicates how deeply human beings are attracted to these semi-understood images, as they promote artistic practices, validate our currency, organise our visual literacy and direct our consumption (Elkins 1999, p.212). It can be reasoned that brands with commercial uses, or devices that have been performing the same function, have existed for about 5,000 years. Their exact origin cannot be proven, but several archaeological remains demonstrate their existence and how they have evolved throughout history, depending on the needs of those who used them and their form on the place where they were applied.
Mollerup (1997, p.16) establishes a classification (fig. 2.3.) of formal expressions of brands in their primitive conception; in their beginning they can be considered brands of the "sender", evolving towards more complex trademarks that fulfilled the needs and desires of people, such as identifying the origin or ownership of products or even their social identity.

Frutiger (1981, p.165) calls these types of signs as non-alphabetical, arguing that understanding between humans has been shaped by linguistic communication, and their primitive versions were gradually fixed in a written way, configuring a means of abstract expression that was very well rationalised. Nevertheless, this was a private privilege of the clerical elite. On the other hand, the population that remained "illiterate" had, in addition to an important oral tradition, other possibilities for fixing and transmitting ideas, such as images, symbols, signs, signals, and types of peculiar, original writing that were carriers of an explicit, open and, therefore, perfectly understandable meaning. The author classifies them as follows:

![Figure 2.3. Per Mollerup Trademark precedents Classification](image)

<table>
<thead>
<tr>
<th>Marks</th>
<th>Statement</th>
<th>Motive</th>
</tr>
</thead>
<tbody>
<tr>
<td>heraldry</td>
<td>social identity</td>
<td>need/desire</td>
</tr>
<tr>
<td>monograms</td>
<td>social identity</td>
<td>need/desire</td>
</tr>
<tr>
<td>branding</td>
<td>ownership</td>
<td>need/desire</td>
</tr>
<tr>
<td>earmarks</td>
<td>ownership</td>
<td>need/desire</td>
</tr>
<tr>
<td>farm marks</td>
<td>ownership</td>
<td>need/desire</td>
</tr>
<tr>
<td>ceramic marks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
<tr>
<td>stonemasons' marks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
<tr>
<td>hallmarks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
<tr>
<td>printers' marks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
<tr>
<td>watermarks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
<tr>
<td>furniture marks</td>
<td>origin</td>
<td>need/desire</td>
</tr>
</tbody>
</table>

![Figure 2.4. Adrian Frutiger Non-alphabetical signs classification](image)

Adrian Frutiger Non-alphabetical signs classification

<table>
<thead>
<tr>
<th>Signs Category</th>
<th>Type of signs</th>
<th>Signs Category</th>
<th>Type of signs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pseudoscience &amp; magic</td>
<td>The elements signs</td>
<td>Marks</td>
<td>The past marks</td>
</tr>
<tr>
<td></td>
<td>Astrological signs</td>
<td></td>
<td>Cattle marks</td>
</tr>
<tr>
<td></td>
<td>Alchemy signs</td>
<td></td>
<td>Trade marks</td>
</tr>
<tr>
<td></td>
<td>Cabalistic, magical and talisman signs</td>
<td></td>
<td>Artisan and industries</td>
</tr>
<tr>
<td>Signatures</td>
<td>Mason signs</td>
<td></td>
<td>Water marks</td>
</tr>
<tr>
<td></td>
<td>Monograms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>House marks</td>
<td>Technology and Science</td>
<td>Ideography</td>
</tr>
<tr>
<td></td>
<td>Japanese family shields</td>
<td></td>
<td>Modern sciences</td>
</tr>
<tr>
<td></td>
<td>Heraldry</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Present Communities</td>
<td></td>
<td>Signal signs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Environment orientation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Pictograms</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cartography</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Service (UX)</td>
</tr>
</tbody>
</table>
In these classifications there is a disjointed balance, according to the model, in the graphic elements that make up the visual sign and those that make up the verbal one.

At present, I can see how some of these models, described by the three authors, are used by organisations, each comprising a part with a verbal sign and a part with a visual one. Chermayeff & Geismar (2000, p.3) indicate that these models can now be expressed in many styles, and that each one has been designed to provide, in a distinctive, memorable way, an appropriate visual expression of the organisation it represents.

When I look at the types of devices used today (fig. 2.6), I can detect a degree of tradition in the use of a certain model. For example, many public institutions use devices originating from heraldry, while fashion labels use monograms, and stamps on many food products also evoke tradition, as do pictograms in software applications. Hence, it can be
deemed that in the process of design this factor must be taken into account when taking creative decisions. For that reason, it is logical to conclude that the use of one model or another can influence functionality.

So far I have analysed a series of questions that help contextualise some of the factors a designer must consider before developing a formal solution: the importance they have in communication processes established in the dynamics of the economy, politics and society; the value they have for building the visual language of the identity of commercial brands and other entities; what the hierarchy is for these basic identity devices within this language; and that they are formed by two types of sign, verbal and visual, although not always in balance or proportion. I have also analysed how these devices are not of recent creation, but rather formal models that have existed since ancient times. From this moment on, I will analyse existing literature regarding methodologies to design trademarks. A synthesis grouping the concordances of the different authors will be established. Hence, a basis will be obtained to determine the factors that can optimise the design process for trademarks.

**Existing knowledge about Trademark design methodology**

As Schmidt (2012, p.20) affirms, trademarks become more powerful when they are well-designed as they work on applications, help reinforce the visual identity by making it more recognisable and instil confidence in the organisation. The fact they are appropriate and meditated shows that the organisation is concerned and thinks holistically when it comes to creating an impact. Rand (1993, p.61) reaffirms this idea explaining that although design is a vehicle for memory, be it good or bad, good design adds value in some way, adds meaning, making it easier to remember a pleasing image, and deep down, is a reflection of the business it symbolises. It implies the organisation has a purpose and is synonymous with the quality of its products or services. As Olins (1989, p.73) warns, however, it is not an easy task and should be carried out with great care, since it is widely accepted that a well-resolved symbol, in an almost magical way, epitomise the whole idea of a company, becoming a powerful, beneficial device. However, it is important to understand that symbols can be resolved brilliantly, thus becoming memorable, yet when the task is not carried out professionally, the effect may be the inverse.
Shumate (2015, p.61) adds that a badly designed trademark can double or triple the costs of reproduction, and can even nullify the functionality of the media where it is applied.

Henderson & Cote (1998, p.15) indicate that the functionality of a trademark occurs on two levels. The first level corresponds to being identified correctly, this means that consumers / users must remember having seen it beforehand. The second level should allow consumers / users to remember which organisation the trademark belongs to and to build meaning around it according to the experience offered to them. According to the authors, the first level essentially depends on the design, since a more memorable design will be more easily recognised than one that is not. Hence, in order to make the trademark more memorable, work should focus on a design that is easily recognised. In order for this identification to be accomplished, Rand (1993, p.58) asserts the functionality of the first level of a trademark, which should express the "who" rather than the "what", and advises against complex designs that attempt to include an excess of literal concepts, since these make identification more difficult and the "message" more diffuse. Consequently, Rand concludes, along with Buck (1916), Mollerup (1987), Slade-Brooking (2016) et al., that simplicity is the main quality in becoming identifiable. J. Walter Thomson Company (1911) and Buck (1916), at the beginning of the 20th century, were already cautioning how a large convergence of offers in the retail market conditioned the visibility of trademarks and simplicity alone did not guarantee identification, but that these devices should also have enough distinctive features to become unique and, therefore, yet more visible. Slade-Brooking (2016, p.27) is a contemporary that also repeats this idea, adding that a distinctive trademark can cross national and cultural boundaries. Distinction will also be, according to Wildbur (1982), Hart & Murphy (1998) and Lutzker (2003), an essential quality in registering the trademark legally, as it will have to demonstrate that it does not express a generic concept, and cannot be confused with an existing trademark within the scope of the product or service it offers. The more distinctive the trademark is, the more likely it is to be legally available and the stronger the rights it will obtain once in use. Accordingly, Chermayef & Geismar (2000, p.8) state that a trademark must have form and substance, image and idea. So to be effective, their forms should be sufficiently familiar to be recognisable, while unusual enough to be memorable, with their expression being
simple enough to be read in a moment, yet sufficiently rich in detail or significant to be interesting. The same authors incorporate another quality trademarks should possess: adaptability. This is key in maintaining vitality and relevance, although should be balanced with the need for consistency. Wildbur (1982, p.20) highlights the practical restrictions that affect trademark design, such as the need for its reproduction to be adaptable to any medium or system. It is highly important then that, when specifying the uses of the trademark, sufficient variants conditioned to the limitations or technology of each medium are normalised in order to maintain visibility and consistency. According to Slade-Brooking, (2016, p.27) it should be applicable in any promotional material, from points of sale, posters and signage, to magazines, online advertising, TV and printed material such as packaging, emails and stationery. This caused Wildbur (1982, p.21) to introduce a new requirement that trademark design should meet: the scale problem. It is essential for it to be adaptable to very large or very small formats. In most cases, it is necessary to prepare several basic versions of a design, which take into account problematic aspects such as line weight, optical effects, ink propagation or patterns of interference on the TV screen. Slade-Brooking, (2016, p.27) also points out that a limited colour palette can help in this regard.

However, Chermayeff & Geismar (2000, p.7) warn that the contexts in which the brand will be seen, and the audience it is aimed at, should be specifically examined, as they may also require explicit symbolic meanings, visual language or social attitudes. All these considerations provide a set of performance criteria that should help guide design process and limit the territory to be explored for each client.

The considerations I have analysed so far correspond to those of a physical-spatial nature. However, the authors also consider a requirement that we could call transient nature; Buck (1916, p.63-64), Wildbur, (1982, p.20), (Masten, 1988, p.20) and Chermayeff & Geismar (2000, p.8) agree that one of the most demanding requirements of a trademark is that it has a certain degree of timelessness. This quality can be ensured by avoiding the use of fashionable visual clichés. That said, the authors acknowledge that it will be impossible to escape from a certain "period quality", since the proposal must be sufficiently contemporary in order to reflect its time, yet flexible enough to evolve as society and its owner change, and solid enough to create continuity. Wildbur (1982, p.20) expresses it very well by quoting Walter Herderg, "A firm and its registered trademark may well be
old, for age shows that they have stood the test of time; but a trademark that is out-of-date is, in both senses of the world, a bad sign!” It is accepted, therefore, that the visual qualities of a trademark should be effective among its contemporaries, making it long-lasting without becoming out-dated.

On the second level of functionality that Henderson & Cote (1998, p.15) indicated – that which allows consumers / users to remember which organisation the trademark belongs to – this memory will be subject to the qualitative relationship established between the experience that the products and services of the organisation offer and the construction of meaning that the formalisation of the trademark has accumulated. Chermayeff & Geismar (2000, p.8) emphasise that the formal expression should be adapted to the ideas and activities it represents, creating a unique, clear, direct image that embodies the character and aspirations of the organisation. According to Wheeler (2006, p.20) the formal expression should convey the DNA of the brand’s positioning and vision, should build consensus and also promote the pride of employees. Chaves & Bellucia (2003) encapsulate it in the idea that a trademark should fulfil a universal semantic condition: compatibility. It should not make explicit references to meanings incompatible or contradictory to those of the organisation, to the conventions of the consumer / user, or to the sector where the offer has been placed.

In order to confirm the main methodological parameters, which have obtained the highest consensus among different authors, listed below is a Decalogue of principles and parameters to be considered in the process of designing trademarks. Figure 2.7. contains a summary of the 10 authors analysed and to what extent they coincide and share certain precepts.
From the study of the different approaches a model has been synthesised (figure 2.8) which contains the four essential principles most authors share.

4 Principles for designing appropriate Trademarks: Own creation.

<table>
<thead>
<tr>
<th>Principle</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meaningful</td>
<td>Responds to the company vision</td>
</tr>
<tr>
<td></td>
<td>Responds to brand/product/service positioning</td>
</tr>
<tr>
<td></td>
<td>Fits in consumer/user conventions</td>
</tr>
<tr>
<td></td>
<td>Fits in the sector</td>
</tr>
<tr>
<td>Visible</td>
<td>Simple</td>
</tr>
<tr>
<td></td>
<td>Different</td>
</tr>
<tr>
<td></td>
<td>Allure</td>
</tr>
<tr>
<td></td>
<td>Understandable</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicable</td>
<td>Space</td>
</tr>
<tr>
<td></td>
<td>Gibbs</td>
</tr>
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<td></td>
<td>Small</td>
</tr>
<tr>
<td></td>
<td>Visuality</td>
</tr>
<tr>
<td></td>
<td>Printing/Display systems</td>
</tr>
<tr>
<td></td>
<td>Time</td>
</tr>
<tr>
<td></td>
<td>Sustainability</td>
</tr>
<tr>
<td></td>
<td>Coherence</td>
</tr>
<tr>
<td></td>
<td>Has perishable</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Principle</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecible</td>
<td>Uniqueness</td>
</tr>
<tr>
<td></td>
<td>Registrable</td>
</tr>
</tbody>
</table>

Figure 2.8. 4 Principles for designing appropriate Trademarks

The trademark should fit within a meaning. It should respond to the vision of the organisation, to the positioning of the product/service offered; it should fit into the cultural conventions that the consumer assimilates with regard to this positioning and should conform to the common visual expressions of the sector where it has been placed.

The trademark should be visible. Simplicity will allow it to become elemental; being different will allow it to attract attention; being attractive, with the capacity to seduce by itself, and able to be interpreted logically will facilitate its mental recording.

The trademark should be applicable in space and time. It should be applicable in space, either in black and white or colour, in a small size or a large format, and it should be adaptable to any support or system of reproduction.

It must be applicable over time, without its application generating excessive costs, being sufficiently coherent to adapt to the necessary discourse within the context of the time, yet without going out of style.

The trademark should be legally protected. It should have a sufficiently different character so as not to be confused with any other trademark within the same sector. It must comply with the relevant legal precepts in order to be registered.
Limitations of the existing literature

As I have mentioned before, the trademarks design methodology has been studied in three areas: the importance of generating meaning, what functional parameters should be taken into account for creative decisions and what the legal requirements are so they can be registered. However, I could not find any approach that can accurately validate what relationship parameters are established between meaning, environmental factors and graphic formalisation. We should remember that the history that precedes us is filled with success stories not based on a strict professional design methodology, but instead problems resolved through intuition and experience. Starling (2011, p.146) reinforces this idea stating that, while research on the market and consumers is highly evolved, the rationalisation and logic applied to the creative process in trademark design today is still quite subjective and scarcely parameterised. She affirms that ideas arise randomly, far from the logical systems of analysis in research, and therefore, the designer’s competence is often based on hunches, intuition and experience. Martí (1999, p.85) sets out the causes asserting that the activity of designing has historically evolved through experience; humankind faces the environment from planned actions, and that all estimates concerning the project require previous learning. That is why, according to the author, we are unable to find, at any time, what we could call an action devoid of information from the past. Slade-Brooking (2016, p.85) raises the problem of defining a methodological model by explaining that while the design process is a highly linear approach, it is also highly personal and experienced in a different way by each designer. A designer’s thinking evolves from uncertainty to certainty through questioning and response stages, which is what makes the methodology much more difficult to define. Wildbur (1982, p.26) says that although in the work of a trademark designer there is always an inspirational aspect, which can sometimes make the solution arrive immediately, it is usually a long process, where many alternatives must be discarded before reaching the final solution. In the absence of shortcuts that facilitate the process, it is highly desirable to have a pattern that will allow the solution to be determined more effectively. This difficulty in defining a methodological procedure causes, not only an uncontrolled duration of the process, but also that the trademark design project drifts towards the emotional considerations of the designer or those who have to validate the proposals, ignoring who the trademark is really targeted at: the consumer / end user.
Thus, random and often uncontrolled results are obtained, which may even lead to discussions based on personal tastes, a situation contrary to the application of a method of analysis and execution that validates the relationship between questioning and response.

This issue highlights an extremely important factor that I have already mentioned in the section on the introduction for this research. A fact that I have been observing throughout my career, that reveals the positioning of the designer between two boundaries: as an experimental designer who imposes a certain style on any creative project and as a consultant designer who uses a specific style according to its suitability for the problem in question. The first is positioned as a creator with a certain character, offering the interpretation of commissions from the perspective of this character. The client bases the contracting of this designer based on professional background, anticipating the stylistic result obtained and, to some extent, seeks the designer’s signature, reputation and style. The experimental designer need not justify formal decisions in relation to the assignment, since the client has already accepted the premise that these decisions are correctly formed, which is the reason why the designer has been selected to carry out the project.

At the other extreme, the consultant designer is positioned as not having a predetermined style, interpreting the assignment from a neutrally stylistic perspective. This professional position encourages pertinent decisions to obtain a formal result adapted to both the perception of the client and the idea which the user / final consumer should interpret. In this sense, my unequivocal position is that of consultant designer. However, from a personal perspective I do not think that one is better than the other, or that one position is more legitimate than the other. These are two approaches to a project. The difficulty of the first is to achieve sufficient status and prestige to become unquestionable. For the second, which is one of the reasons for this thesis, it is to have some methodological foundations that allow the designer to become unquestionable, not through a high power of seduction, but rather by establishing a body of almost empirical evidence that will act as a guarantee to solve the problem in question. It is also important to understand that this is not an explanation of two polarised professional profiles. While some fit this description, most fluctuate between these two approaches, combining them in accordance with the type of project they
face. The aim of this observation is to show that the type of methodology should be chosen in line with the role one wishes to perform.

I should add that in the mediation processes between designers and clients, different levels of decision-making may be involved, meaning successive validation checkpoints will need to be passed. These processes are especially delicate, since the designer should endeavour not to progressively lose the essence of the original idea by having sufficiently solid arguments to do so. This requires the ability to adapt to demands that may arise, while offering a creative response coherent with the positioning. The level of compromise is difficult to measure, but coherent, relevant solutions should not generate as much concern as personal opinions. Compromising in that sense will produce a random, capricious result unlikely to solve the problem raised.

From personal experience, the type of project development that generates more confidence in both parts is that which is balanced; fluctuating from the more generic to the more detailed, and from the more conceptual to the more practical - where decisions are made jointly, subdividing the process of what is more generic to what is more specific, sharing the decision-making based on the knowledge of both parties. This includes the relevant cultural conventions of the target group that will interpret the visual identity. In this sense, Napoles (1988, p.37) expresses that the work of a trademark designer has become much more complex, including issues that do not form part of the "creative" side, such as the company’s operating, marketing and financing strategies. The designer will have to investigate strategic issues, and know how to listen, thus obtaining a complete understanding of what should be communicated. The history of the organisation (past, present and future) needs to be visually conveyed by the designer, and so the ability to interact effectively is implicit in the work today. At the end of the process, professionals must be able to translate the company’s objectives into a relevant brand, adequately communicating the objectives of the company to the target audience. Werkman (1974, p.447), Olins (1989, p.73) and Starling (2011, p.147) state that the methodology to apply in the development of trademarks is especially complex and difficult, as all the threads of relevant information must be joined to visually articulate something unique, memorable, which represents the organisation, while avoiding negative connotations and meeting technical requirements. Murphy and
Rowe (1988, p.15) agree that in order to achieve these goals, a trademark designer must have distinct skills as well as creative ones:

- Strategist -> must be proficient in defining a design strategy.
- Researcher -> able to explore and synthesise a great deal of information.
- Creator -> utilise creative skills and the available data to solve a design problem.

The authors add that the design process of a trademark requires the following specific skills:


<table>
<thead>
<tr>
<th>The role of the designer</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Process of Design</td>
</tr>
<tr>
<td>Developing a design brief</td>
</tr>
<tr>
<td>Gathering information about the client's requirements</td>
</tr>
<tr>
<td>Developing design concepts or &quot;models&quot;</td>
</tr>
<tr>
<td>Presenting solutions and justifying them</td>
</tr>
<tr>
<td>Implementing the chosen solution</td>
</tr>
</tbody>
</table>

Figure 2.9 The role of the designer

Another aspect I have observed, with respect to the methodological processes of design in general, is that designers frequently act without considering what precedes them. It seems that creative activity is based on a dogma that leads professionals to a feeling that their role is to perpetually offer novelty, a new unknown vision. They interpret the trend of the moment and transform communication from a renewed vision, which evolves and progresses while leaving behind the past. Often, a dynamic of change without reflection is entered into; a certain restlessness: change is an easy way to create an impact, but when this change is constant, and often random, it can eventually generate the opposite effect.

In terms of visual identity, the accumulation of chronic instability can generate distrust in the long term. Tactical movements of advertising, such as changes and reactions to an aggressive market, to the competition or at the point of sale, should not be confused with more strategic issues. When I speak of hierarchy in the construction of visual identity, the higher elements must be as perennial as possible, as these will remain more solid in the mind of the user / consumer. Brands that have been able to consolidate their elements of identity over time are today more powerful, in terms of recognition, than those that have doubted and not been able to
stay in the same vein. A designer must contemplate the possibility of looking back and restoring a path that benefits recognition.

In this context, Olins (1989) and Chaves and Bellucia (2003) reinforce this idea, identifying two trends in the trademark design literature; one that only attends to the pressures of immediate notoriety, and the other, which is more profound, aspires to meet the demands of strategic positioning. The first falls into the trap of treating the identifying signs as another conjectural message, merely constituting tactics and getting attention as a result of the change. The second reserves the signs of visual identity for the strategic mission of prolonged, stable identification, relegating their importance in functions of conjectural impact on advertising. Chaves and Bellucia (2003, p.120) argue that the epicentre of this graphic strategy should be located in the carefully conserved typological and stylistic connection of the signs. This, they claim, requires a designer with a profound knowledge of graphic resources and the relevance of their use for the visual identification of organisations. One of the key points the thesis aims to achieve is to lead the methodological process towards rational reasoning, and that this in turn will provide the guidelines for emotional reasoning. A rationality that does not look for a rigid pattern of systematised action according to certain contexts, but rather provides a sufficiently panoramic view that allows alternatives to be envisioned and sufficient criteria applied to choose the most relevant option from an emotional perspective.

Southgate (1994, 61) identifies these two approaches to the formalisation of the trademark, distinguishing them as the part that gives meaning to the part that makes the trademark prominent, and indicates that an important distinction between the two methodological approaches must be made. The first one has to do with what qualities are being defined by the trademark in a certain way, and the second one has to do with the identification of visual qualities and how strongly consumers remember them and link them with the brand. Baer (1976, p.VII) also points in this direction, reminding us that when a designer creates a trademark, his main task is not to make a piece of art and turn it into a decorative element, but rather to find the most synthetic way to communicate about a product or service; on the other hand it must have maximum versatility since it will be used in a wide variety of platforms and situations. Southgate (1994, p.63) emphasises that the important question about a specific formalisation is that we must understand in
what way it is contributing, not in the mind of the client, nor in that of the
designer, but in the mind of the audience. In my point of view this what
explicitly states a limitation of existing literature, as it is especially
complex. How the designer must interpret cultural conventions and adapt
the personality of the visual language, trying to make sure it is understood
and interpreted according to the initial function required by the contract;
as such, the designer does not have absolute freedom, since if it is not
interpreted, or is interpreted in a wrong way, it loses its meaning and
purpose.

As I have described in previous sections, of everything that
represents the brand, the visual identity device is only the tip of the
iceberg, and its representativeness, even though it is in the highest
hierarchy of perception, builds its own meaning continually out of
everything that it does and says, and therefore the environmental factors
that condition the correct reception of a visual identity and its potential to
accumulate meaning are many. Neither does it take into account the
relational environment, on which platform it is applied, and how this
support is ergonomically related to the consumer; finally, the stimuli
created by the prior marketing strategy in the media are not taken into
account. In this sense, Batey (2012, p.129) reflects on the fact that there is
no meaning without a context: “The context can be of a personal, situational or
sociocultural nature, for example. People differ in the stimuli they perceive, and
they can also differ in the meaning they give to these stimuli, and this is the case,
in particular, when they have different environments and cultures. A person can
obtain a different meaning from the same group of stimuli depending on the
context in which they are found.” The author points out the importance of
context when the thinking and action surrounding a brand coincide. The
author also indicates that the physical and social environment can
influence the brand’s frame of reference, and that the same person may
consider a brand in different ways at different times; and the context in
which a brand is evaluated can lead to placing one of the interpretations
in the foreground, avoiding a duality or even a paradox in the way people
perceive a product or service. That is why this reflection has led me to
another, in the sense that perhaps I cannot aspire to establish a method
which ensures that connection, which connects a specific visual
expression with a meaning. As Batey (2012, p.29) points out, this meaning
is created not only as the result of the marketing activity, but also as a
result of the audience’s interpretation of a set of associations, perceptions,
and expectations that exists in their minds. All of these experiences end
up being a set of associations that influence the perception of the trademark. That is why I should perhaps orient the refinement of the methodological process towards discovering what is appropriate for a given framework. As I mentioned in the motivation for this thesis, in order to base the designer’s work on a solid footing that gives credibility and confidence, the methodological contribution must be based on the stabilisation of the process itself, and the concept of belonging to the sector where the offer is located can help substantially.

In the Latin-American context, Chaves is an author who has dealt with this topic in depth. He comments that traditionally the activity of designing institutional identifiers has been based on erratic graphic exploration, and that one should aim for a more controlled approach, consisting of identifying strategies, discarding non-pertinent ones, and concentrating on the options that have been deemed pertinent. Even so, from my point of view, this requires the use of theoretical parameters or matrices to establish the criterion of belonging. The authors I have studied consider typography, colour, and the contribution of meaning when generating a form as key ingredients in designing a trademark; however, except for Chaves et al. (2006), I have not found any other author that takes into consideration what I could call the type of relationship between a verbal sign and a visual sign. As the relationship between verbal sign and visual sign has been shown to be important in defining the identity device, I could ask myself if a trademark designer, when developing a design project for identity elements, takes into account or recognises the different possible formalisations of the trademark or whether, as Chaves says, acts in an "erratic graphic exploration". Whatever the reality, the thesis begins to indicate that an aspect that has been shown to be important in trademark design methodology is to incorporate consideration of the type of device; that is, which relation between the verbal signal and the visual signal is ideal both for its meaning and for its functional validation. And, as Chaves and Bellucia (2003, p.20) point out, this issue must be assessed from what is clearly incompatible, not from what is compatible, and they define this with a phrase that has become key to the thesis: “the limit of arbitrariness is set by the contraindication”. Thus, I would say as a designer that, once I have assessed the non-contraindicated options on the type of device to be used, I should be more focused and make design decisions on the use of the typography and graphic elements that are supported by other aspects of viability. In line
with this reasoning, one element that could consolidate a methodological process of trademark design is the consideration of suitability; the use of a certain relationship between the verbal and visual signs. To this consideration, I can add a phenomenon that I have detected, and which can lead me to formulating a research question, which is characterised by the perception of certain mimicry in the type of relationship between the verbal and visual sign in particular product and service sectors. It is apparent that this formal characteristic is not used as a stylistic resource, seeming more like something that provides certain advantages when conveying an idea of the type of strategic positioning for the offer in question.

**Development of the research question**

Forty years ago, Baer (1976, p.VIII) detected several examples of different industries and companies that had very similar designs. The author justified it because it seemed inevitable, as brands are part of the collective consciousness of society. According to Slade-Brooking, (2016, p.113) this consciousness perceived in specific visual languages--formulated with colours, typographies, shapes, and images-- have appeared mainly during the 20th century, and has resulted in the fact that a glance at different products and service sectors continues to reveal certain shared characteristics that affect the expression of the basic visual identity devices. On this issue, Ladwein (1994, p.4) adds a consideration that adds a factor of complexity in the interpretation of this phenomenon; the author considers the work of Dimitriadis (1991), which highlights the existence of an interaction between brands and products, and that both constitute an inseparable category in a consumer’s interpretation process. As we can see in Figure 2.4., Ladwein (1994, p.4) outlines Dimitriadis’ (1991) idea where the conceptualisation of a product under a particular brand is the result of simultaneous activation of the brand’s story and the interpretation of the category where it is located.
As anticipated in the motivation for this thesis, throughout history the models of expressiveness of visual identity devices have been created based on certain needs in the same way that they have also evolved and adapted. This has led to today’s companies and organisations, to use different patterns of expression: logotypes, symbols, combinations of both, heraldic shields, watermarks, seals, monograms, calligraphy and pictograms, among others. Nowadays, a phenomenon of mimicry can be identified in the categorisation process for different consumer sectors in the use of the same type of device.

The assumptions set forth below should be considered as presumed, since I do not have enough literature to contrast their validity with other authors, and it will not be until I develop an exhaustive and unique study of every case, which can verify the reason for this mimicry accurately. What I can say is that it is a perceptual reality, which impacts the culture of the visual language of brands.
As we can see in Figure 2.11, in the automotive sector, there are mimetic visual expressions in the shape and location of emblems on cars, presumably conditioned by the characteristics of the product on which it is applied, as well as its functional needs. Most of the devices that I have observed are round or elliptical, usually contain the name, or the initials of the brand, and are located on the front of the vehicle, thereby fulfilling the role of insignia or emblem. They are located in the central-upper part of the radiator grid and are formalised considering their volume as a design included in the embellishments of vehicle design. On the other hand, the name of the product is located on one side on the back of the vehicle. The apparent causes of this mimicry could be due to the old need for an opening in order to fill the engine radiator; these were covered with a cap that was ornamented allegorically. I could presume that the function has taken a form and character particular to the sector.

In the case of trademarks on watches (Figure 2.12), I see that the product’s own configuration also conditions the application of the device. Due to the traditional layout of hours on a watch, and to guarantee the maximum hierarchy of the device, it is usually placed just below the outer circle.
o'clock point. As there is a space created by this peculiarity, I observe a certain predominance of a model composed of a vertical relation between the visual sign and the verbal sign.

Consumer products in general are characterised by the constraints represented by the point of sale where they are offered. Southgate (1994, p.57-58) emphasises that these products are placed in contexts overloaded with visual stimuli, and that time plays a very important factor there. A fraction of a second can determine the choice of a product, so categorised perception is the first consideration that a consumer takes into account. This may be the reason by which a consumer’s choice of a given product is conditioned, not only because of the degree of loyalty attached to it, but also because there are always alternatives surrounding the product that aim to become the chosen ones, whether due to distinct advantages or to being available at a lower price. This context greatly conditions the visibility of the identity device, since the space where it can be expressed is the packaging itself, and in this space not only must the visual identity be transmitted, but also a whole series of benefits that the product claims, as well as the identity of the sector to which it belongs. Slade-Brooking, (2016, p.111-112) identifies three groups of high consumption products that use a peculiar visual language to provoke particular reactions or emotions. These are: inexpensive brands, which tend to use simple designs, basic images and a reduced colour palette with primary colours; the mid-market brands, which have the most decorative language of the three, with more colour, a wider variety of typographic, photographic, and illustration options; and luxury brands, which return to simplicity, but in a very different way from the inexpensive brands, minimizing both colour and style, and where the typography is carefully designed using expansive spaces, along with other printing techniques, such as stampings, dry reliefs, and varnishes.
The characteristics of the mid-market product can be seen in Figure 2.13, where some examples of the sweet snacks sector are shown. In their trademarks, it can be observed that the device requires holistic expressiveness combining the verbal sign intertwined with the visual sign, communicating the characteristic features of the product in the least amount of space.

Another of the consumer sectors where I can observe mimetic visual expressions is in the fashion industry. Although it is a very stratified industry in terms of product positioning, I can find in its different categories certain examples that determine types of clothing; in the case of the most focused brands in what is called the sport or denim category, I find mimicry in the expression of the identity device on the chest of polo shirts. In order to find a likely reason for the evidence of similar visual expressions, I must go back to the origin of the practice of sport. It was common for athletes who practiced a group sport, such as soccer teams, rugby teams and even Olympic teams, to have the team clothing identified with a device. This dynamic was then transferred to the street fashion world, presumably by the Lacoste brand. As reported on its website, in his youth, the founder was a successful tennis player, known as “Alligator”. This nickname prompted him to wear an embroidered crocodile on the equipment he used, and later when he started the sportswear business he began to embroider all his products with the crocodile, and this became the emblem of that product. It was immediately recognizable, and as it became a commercial success, many others followed the same dynamic, as it offered a rapid identification of the brand. It had the prestige of its high-powered insignia and social status, and at the same time had the power to attract possible new consumers.

In the case of haute couture, I also find mimicry that presumably responds to a dynamic assimilated into the story of the brand and how the whole process of the creation of the collections is configured, how this is communicated, and how a designer builds its value. As we can see in
Figure 2.15., many haute couture brands use devices composed exclusively of verbal signs that express a proper name, and lacking any ornamental element. Roberts & Armitage (2015, p.43-44) point to the possible cause of this expressiveness, when they point out that there is an emphasis on fashion designers, that luxury fashion houses are named after their founders to link the product with a creator, and that in this way attempt to reinforce the importance of the creative talent of the individuals who inspire the product.

![Figure 2.15. Trademarks on Haute Couture](image)

We can also see how the use of monograms is common; these become complementary graphic elements, valuable in the dynamic of the commercialisation of the products not so much in haute couture itself, but in accessories connected to the story of the brand. This is valuable in driving economic profitability, as they become powerful insignias in perfumes, fashion accessories and leather goods.

![Figure 2.16. Trademarks on Fashion Magazines](image)

In the publishing sector, in particular, I present two examples that clearly express a common feature in the expression of their identity devices, fashion magazines and general newspapers. Both employ devices located in headers, devices that identify the publication in the first
hierarchy. In the beginning, they were not configured as trademarks, but with the evolution of publishing markets and competition they have become brands like many other consumer products. It is in their history where we can find the reasons for this expressiveness. In the case of magazines, the specialisation by subject requires the design of the header to be formalised visually in relation to the contents of the publication. Specifically, in the case of fashion magazines (Figure 2.16.), we would have to go back to the 50’s when the magazine publishing industry reached its peak – colour photography was introduced, art directors transformed narratives of publications, and they become an essential part of the communication media of the fashion industry. In the beginning the headers were not considered trademarks, as the font styles varied depending on the styling of the illustration or photography that appears on the cover. However, with the consolidation of the medium, the increased variety on sale at kiosks, and the need to include an identity element on the cover, the headers became established as logotypes. Throughout the 60’s, the leadership of Vogue, Vanity Fair and Harper’s Bazar established what was considered conventional in publications, all three with headers composed of neoclassical typography, and an elegant, feminine and sophisticated font; and with their clear Italian origin, they ended up conditioning the visual expression of the new magazines that would later appear.

In the case of general newspapers (Figure 2.17.), I can interpret that the design responds to the structure of the page and to the resolution of a purely editorial hierarchy, where larger font sizes represent generic concepts and small fonts the complementary information. In the typographic composition of the layout, understood as the technical part of mobile typesetting, the top part contained the name of the publication; over time this became illustrated, either to represent the newspaper’s home city, idiosyncratic reasons, or even the political inclination of its publisher.
This location also reflects the way in which the publications are displayed at the point of sale. Given the variety and number of papers on sale, these were overlapped with each other, leaving the header as the only visible element.

As a final example (Figure 2.18.), I present mimetic visual expressions found in the devices of Western European public institutions. Those countries with an important medieval tradition, specifically the identity devices of the municipal institutions, show the unequivocal use of devices sourced in heraldry. As we will see subsequently (page 134) in the case of the City of Barcelona, the reason that they follow the precepts of heraldry is determined by municipal, regional or state law, which regulates the symbols that represent these institutions. Therefore, the mimicry is not only the product of an evolution of the sector itself, but of regulation.

![Figure 2.18. Western European Public Institutions Devices](image)

Of the cases that I have described, I can interpret that the presumed reasons for these similar visual expressions are different:
- It is something that originates in the product itself
- It is a synergy that results from the actions of some leaders
- The sector has created a culture around itself
- For legal reasons
- For certain processes of brand narratives

As I have analysed, presumably this mimicry is due to the very nature of categorisation that occurs in consumer sectors. Promotion and sales processes are helped by grouping the supply into categories of common consumer needs. I can assume that, despite highlighting the competition and the struggle to be chosen, it helps sellers to set up a common framework of action, some common codes, and somehow create the idea of a “sector identity”. In certain consumer sectors this dynamic is very obvious, as it also takes on an essential character of the operation of
the point of sale: as I have shown before, given the great number of items
for sale in supermarkets, without a categorisation of products the act of
purchasing would be an almost impossible activity to carry out – this
categorisation helps to organise and prioritise the purchasing process, to
evaluate different options, and to make a decision based on either fidelity
to a brand, price, or impulse. In this common display, products and
services have evolved, competing and adapting for recognition; some have
survived while others have not, some have exchanged sector leadership,
adapting to the needs of consumers, improving the product’s quality or
virtues. In short, the pressure of constant competition to become the
chosen product also causes competitors to take similar decisions that can
affect both the design of identity elements and other aspects of visual and
operational communication. Apart from the cases I have mentioned, we
can say that I have detected mimetic visual expressions in visual identity
devices in a wide range of sectors, some of which can be found in
consumer products such as toys, video games, cigars, cosmetics, and
others including public safety and public health services and
entertainment activities such as sports clubs and television channels.

This is the basis of the reasoning that allows me to approach the
research question: it is conceivable that the use of a certain relationship
between the verbal sign and visual sign becomes a decision conditioned by
a previous analysis of the consumer/user reference framework. Slade-
Brooking (2016, p.113) supports this idea when she recommends that
before beginning any creative work, the design team must investigate the
specific language of the product category in which the new brand will be
placed. Southgate (1994, p.56) also points to this idea, stating that no one
designs a trademark in a vacuum, as there is a certain competitive
environment that acts as a “frame of reference” within which each product
or service operates. As discussed above, these environments have been
developed over the years, either by accident or by design, for individual
visual languages or for categories, and impose certain restrictions within
which the communication of the trademark must take place. The author
also emphasises that ignoring the common visual expressions of the
category is risky, since you can remove the product or service from the
reference frame of the user or consumer, and consequently take it out of
competition, since it ceases to be a part of the interpretation of the whole.
Murphy & Rowe (1988, p.39) claim, however, that designers must also be
careful in the interpretation of the identity of the sector, since dealing
with similar problems often results in relatively similar solutions. And at the same time, this is a trap, since many seemingly similar design solutions are dictated more by fashion and lack of imagination than by external rules, obtaining imitative, even banal results, since it is easier to obtain a hybrid approximation of the logotype style of their client’s main competitors than to design something truly original. On this question, Southgate (1994, p.57) warns that the identity of the sector should not be used as a corset, since there is no point in having a design that simply resembles the rest. The visual language of the category need only be used to ensure that the brand is located in the relevant reference frame, and no more. And he states that belonging is something that we must investigate with care and sensitivity. It should also be noted that although I can find many similar cases, there are also in each sector, in smaller amounts, examples that do not conform to this mimicry. At this point I come to an issue that will become important: being an outsider to majority visual expressions is a risk that can lead to success or failure; it could be a success if the product or service offered by the brand is different from competitors in a positive sense, with a great likelihood of being very attractive to the consumer. Otherwise, if the brand does not achieve these goals, it can create very negative effects: since the consumer may believe that the offer is outside the sector, does not fit with the price range of others, does not comply with the symbolism of status, or in cases where heraldry is mandatory, it can be revoked on a legal basis. All these considerations have led me to create a diagram (Fig. 2.13.), of the types of devices that use trademarks according to the structure of the relationship between the verbal and visual sign, the terminology of the description for their components, and the supposed links to certain categories according to the characteristics of each.
These conclusions allow me to form a research question related to the alignment of the method in order to consolidate a trademark design methodology. As Werkman (1974, p.9-10) indicated, it would be of great value if a method could be established for the creation of trademarks, a method that reduces the possibility of coincidence with the formalisation of an existing trademark, and at the same time not only maintaining acceptability within the framework of reference of its category, but also being able to be registered and protected legally. I agree with this reflection in reference to the alignment of the method – I must find a way for a consideration of the relationship established between the visual and verbal sign is the product of a previous categorisation analysis that will be relevant to a given reference framework. Apart from this consideration, I must recognise that each of the relationships between the verbal and visual sign requires a certain skill on the part of the designer to achieve a specific expressiveness (Figure 2.14.).

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**Table of presumable trademark appropriateness based on brand positioning related to sector conventions. Source: Own creation.**

<table>
<thead>
<tr>
<th>TRADEMARK MORPHOLOGY</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>VERBAL SIGN AND VISUAL SIGN DEVICE COMPOSITION</td>
<td>BRAND BUILD BY A VISUAL SIGN</td>
<td>BRAND BUILD BY A VISUAL SIGN</td>
<td>BRAND BUILD BY A VISUAL SIGN</td>
<td>BRAND BUILD BY A VISUAL SIGN</td>
<td>BRAND BUILD BY A VISUAL SIGN</td>
</tr>
<tr>
<td>BRAND COMPONENTS TERMINOLOGY</td>
<td>SYMBOL ICON PICTOGRAM</td>
<td>COAT OF ARMS SEAL</td>
<td>SYMBOL &amp; LOGOTYPE PICTOGRAM &amp; LOGOTYPE</td>
<td>SYMBOL &amp; LOGOTYPE MONOGRAM</td>
<td>LOGOTYPE MONOGRAM</td>
</tr>
<tr>
<td>PURPOSE</td>
<td>This is the ideal expression for mass products and services, well-known to any consumer—so it has become the iconic symbol. To reach this position must have been in the situation C model used by multinational with high brand recognition.</td>
<td>The majority of products and services that represent this model comes from the heritage or school. This model is more difficult to make the brand visible in its presentations, as the outer shape determines the expressiveness of the graphical elements of the icon. Commonly used in car brands and public institutions.</td>
<td>Without a doubt, this is the most widespread and dominant usage mode, gives its virtue to make variations and to be adaptable. Commonly used worldwide by banks, services and advice firms.</td>
<td>This is the model used in mass market consumer products. One of the models determines the visibility of a product, which is only in little space. Consumer must receive enough information to reveal that product, and nothing to the name and symbolic connotations help to increase the impact.</td>
<td>Common model used in luxury products and services, and also in fashion. The importance and prestige of the name becomes a reference that can contain any personal element.</td>
</tr>
<tr>
<td>EXAMPLES</td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>
In summary, I can say that considering types of devices as an integrated part of trademark design methodology should improve with the inclusion of a proposal in the consumer/user’s reference framework, and therefore adjust the result obtained to the goals of belonging which the device must comply with. Via the sector benchmark, the designer must be able to characterise how the devices in a specific sector behave visually, and thus discern what is important from what is contraindicated, or to determine the extremes between what is conventional and what is atypical, unique, or strange. The conclusions taken from this analysis will affect the designer’s creative process, since each one of the devices establishes a relationship between visual and verbal signs that requires specific skills.

I conclude this chapter by formulating three research questions:

1. - Can the typological consideration of trademarks be integrated into the design decision-making process?

2. Could I establish a typological classification of trademarks in order to integrate the type of device as a variable to be considered in the process of its design?
3. If I include this classification in the benchmark analysis, would it allow the trademark designer to evaluate whether the use of a particular typology would be more appropriate than another?

With this in mind, at this point the thesis raises three specific objectives:

- The study of the methodology applied to the trademark redesign project developed in my professional career, in order to validate if the typological appraisal of trademarks can be integrated into the design decision-making process.

- Define a classification of trademark models according to the relationship established between the visual and verbal sign.

- Propose a system for evaluating the formal common visual expressions of trademarks according to the characteristics of their positioning and the category of product and/or service they belong to.
3. Universitat de Barcelona Case Study

Introduction

As I indicated in the previous chapter, there are many authors who have theorised about the qualities and functions that trademarks should fulfil. However, few have looked deeper into the methodological process in order to achieve goals of suitability for each distinctive case. Hence, this thesis aims to develop and consolidate the processes and methodology of trademark design from the execution of a project. Accordingly, the chapter proposes to solve one of the first issues posed by the research question, and which stems from considerations made previously: if in the process of designing or redesigning a trademark, an appraisal of the relationship established between the verbal and visual sign can be integrated into the synthesis of the four methodological principles we produced from the study of different authors.

To this end, a case developed by the author of the thesis has been chosen. However, before describing said case, it is important to dissipate any doubts that may arise from the fact that I propose to offer a contribution to the knowledge from a single case. Hence, in order to attend to the example, I must first provide a view of a professional career that should endorse me in validating to what extent the case that I exemplify is stereotypical in terms of the research question and relevant issues I have mentioned previously. My professional career started in 1992, just after completing my graphic design studies. Throughout the 15 years I worked at a specialist branding design agency, I evolved towards the specialisation of trademark design. My career continued along this path and in 2006, I founded my own agency specialising in design consultancy regarding visual brand identity. This trajectory has allowed me to collaborate as an art director on many different projects that encompass a range of consumer and service sectors. In terms of the case study, I had the possibility to choose from over 50 cases that fell within the scope of this thesis.
Figure 3.1. Portfolio of trademark examples designed by the author of the thesis.

Figure 3.1 shows a primary selection of 20 examples that I have solved over my 25 years of experience. I present these cases as the most relevant, since I consider that the specifications of each particular assignment have been satisfactorily resolved following methodological processes I had been perfecting and which allowed me to solve the different problems raised. I also consider them relevant as they have had an impact on the public life of the geographical area where I carry out my activity. However, the diversity of sectors to which the samples belong also shows that the control of the discipline corresponds to a variety of realities, each associated with its own conditioning factors that obey specific dynamics in accordance with the sector where the offer is located. As we can see, the solutions obtained are not subject to stylistic positioning, nor to a uniformity of compositional solutions. In each of them, the composition between the visual and verbal sign ratifies a
specificity that has the will to coincide with strategic objectives and adjust to the cultural conventions assimilated by their audience. The project that best exemplified the criteria necessary to test my hypothesis was that of the “Universitat de Barcelona”.

Specifically, the redesign of the trademark for the Universitat de Barcelona, one of the oldest and most highly acclaimed universities in Spain. The case is relevant to the problems raised at a conceptual level, as well as responding in a very transversal way to methodological issues the thesis wishes to go into in greater depth. Lastly, because it is situated in a sector of marked idiosyncrasy and, as such, with well-established cultural conventions, its identity devices are likely to respond to the sector’s idiosyncrasies. Furthermore, it can be contextualised with the usual problems graphic designers encounter in the circumstantial conditions of this type of project.

To develop the project, I will use the model set out in the previous chapter called "4 principles to design appropriate trademarks" (fig. 2.8.), incorporating a synthesis of methodological process (fig 3.2.) considerations established by authors such as Selame (1975), Olins (1978), Wilbur (1982), Murphy and Rowe (1988) et al.

4 Methodological phases based on 4 Principles for designing appropriate Trademarks. Our creation.

<table>
<thead>
<tr>
<th>1. Design Brief</th>
<th>2. Functional validation process</th>
<th>3. Legal validation process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principle</td>
<td>Parameters</td>
<td>Parameters</td>
</tr>
<tr>
<td>Meaningful</td>
<td>Responds to company vision</td>
<td>Protectable</td>
</tr>
<tr>
<td></td>
<td>Responds to brand/product/service positioning</td>
<td>Uniqueness</td>
</tr>
<tr>
<td></td>
<td>Fits in consumers/user conventions</td>
<td>Registrable</td>
</tr>
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<td></td>
<td>Fits in the sector</td>
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<tr>
<td>Skills required: Analytical and Conceptual</td>
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2. Creation process

<table>
<thead>
<tr>
<th>Principle</th>
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<tbody>
<tr>
<td>Visible</td>
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<td></td>
<td>Allure</td>
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<td>Understandable</td>
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Skills required: Analytical and modelling/creative

3. Functional validation process

<table>
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<tr>
<td>Size</td>
<td></td>
</tr>
<tr>
<td>Versatility</td>
<td></td>
</tr>
<tr>
<td>Printing/display systems</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td></td>
</tr>
<tr>
<td>Sustainability</td>
<td></td>
</tr>
<tr>
<td>Conformity</td>
<td></td>
</tr>
<tr>
<td>Not portable</td>
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</table>

Skills required: Modelling/creative and Technical

4. Legal validation process

<table>
<thead>
<tr>
<th>Principle</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protectable</td>
<td></td>
</tr>
<tr>
<td>Uniqueness</td>
<td></td>
</tr>
<tr>
<td>Registrable</td>
<td></td>
</tr>
</tbody>
</table>

Skills required: Technical + Legal advising

Figure 3.2: 4 Methodological phases based on 4 Principles for designing appropriate Trademarks

This consists of structuring the process in a series of phases, which correspond to four main blocks: The first stage is preparing the design brief having analysed the problem.

This forms the basis from which the second phase will start, which consists of creating the design proposal. The third is the functional validation, presentation and acceptance of the design idea. The last phase
corresponds to the legal validation, implantation and implementation of the new visual identity.

**Design brief**

The brief is the document that sets out the characteristics, circumstances and objectives that define the design assignment and that connect the reasoning behind the decisions set in relation to the expected results. The types of brief that a designer will have to interpret, as Wildbur (1982, p.26) indicates, can range from a simple phrase to a ten-page document. However, normally somewhere between these two extremes, the brief should guarantee the quality and quantity of information necessary for the designer to understand the implications and responsibilities the work entails, and orient the result to expectations. The quality of the contents set out in the Brief will be key to interpreting the commission correctly. Southgate (1994, p.134-135) differentiates two types of brief; one prepared by the client, which is intended for all the stakeholders in the consulting and design process; and one called a creative brief, which is based on the first and oriented towards a single audience, the designers who will work on the project. As a general rule, it should contain all the information with a direct involvement in the creative process. It is worth highlighting that its quality will depend on the amount of detail gone into regarding the key problems that contribute to the value and meaning of the proposal, and by balancing that which offers security with the inspirational, the exhaustive with the incisive, the restrictive with that which liberates.

Murphy & Rowe (1988, p.47-48) specify that the quality of this model should be based on a synthesis of all the information obtained from a research process, combined with personal experience, a characterisation of the market and the analysis of competitors, in order to meet three objectives:

- To crystallise the designer’s thinking, classify priorities and understand the precise nature of the work to be performed.
- To help show and verify if the designer and customer’s position are aligned.
- To serve as a reference throughout the project, which can be compared to the final result.
As Olins (1978, p.184) argues, the design brief has to outline what is expected from the visual identity programme. Is it aimed at building a solid internal or external identity? Or perhaps both? What kind of identity is intended to be built? Without falling into the typical clichés of dynamic, powerful, aggressive or friendly, what kind of personality is being sought? And how will it influence the communication strategy? And what degree of change can be expected? Slade-Brooking (2016, p.62) adds a recommendation that is particularly relevant to the case that concerns me. She encourages a retrospective exploration of the organisation’s history: when it was founded, who founded it, what has happened since. Finally, draw up a visual timeline of how its devices of visual identity have changed over the years.

In order to write the design brief, and in summary of the positioning of the different authors consulted, the following questions will be analysed:

**Getting to know the case**
Identify the client, to which sector it belongs, and what the generic characteristics that make the project peculiar are.

**Definition of the problem**
What problem has been identified and made it necessary for a graphic designer to resolve it.

**Vision and positioning of the institution**
What the aims of the institution are and how they are linked to the problem.

**Characteristics and context of the project development**
Definition of the interlocutory protocols for the project and the prescriptive capacity of the design consultancy.

**Analysis and characterisation of the visual identity elements**
Research of visual paradigms regarding the past and present of the institution, as well as the environment where it competes.

**The institution throughout history**
Given the long history of the institution, it will be valuable to know how it has been communicating over time and how political, social and economic changes have influenced its visual identity devices.

**Current situation**
Analysis of the problems detected regarding the formalisation of the current visual identity devices.

**University sector**
Identification and analysis of the graphic paradigms present in the university sector, either by geographic areas or by their age.
Getting to know the case

As previously mentioned, the case I will use to evaluate the methodology of trademark design corresponds to a project to design the basic elements of identity for the Universitat de Barcelona. An institution founded in 1450, closely linked to the history of Barcelona, it is currently the university in Catalonia with the largest number of students and educational programmes.

According to its website, it is the main university research centre in Spain and one of the most important in Europe, in terms of both the number of research programmes and excellence. These characteristics affect a number of additional aspects to those already mentioned: it represents defining the identity devices for an institution that is 568 years old; that universities are currently subject to market laws of supply and demand, having had to adopt a visual expression very similar to that of commercial brands; considering its aesthetic strategy in order to establish objectives of positioning; studying its constant links with society and political bodies; and how all of this has a substantial impact on public opinion.

As Odiwe (1989, p.55) argues, in many ways a higher education institution does not differ greatly from a commercial organisation, especially when it comes to image and marketing its image. Universities commercialise a product – education – for a particular market – students – and in addition, the competition in this market is made up of very similar institutions, offering a very similar service. They all want to attract similar "buyers", while demographic trends indicate that students, within Europe, are reducing in number. Therefore, I can affirm that European universities have fully entered into the dynamics of a competitive market, which has asymmetric levels of supply and demand.

To overcome this situation, institutions must inspire confidence and optimism, not only being as good as their competitors, but also being seen to be as good as their competitors.

In addition, as indicated by Olins (2008, p.16), identity programmes have traditionally been directed to an external audience, predominantly the consumer. Now, however, on the one hand, external audiences have become more complex, and on the other, internal audiences have become much more important.
White (1989, p.30) indicates the importance of symbols when considering the internal audience and for keeping large organisations together. He states how psychologists distinguish between primary and secondary groups, the first being sufficiently small for the members of the group to have regular “face-to-face” contact, while larger groups (secondary) must be united by means of shared symbolic devices. Over time, large organisations maintain cohesion because their members believe in them, recognising the features and values to which they are attached. Universities are examples of secondary groups, composed of an academic body, an administrative body and students. The people who go there learn about the institution they are joining through publications, written communications, contact with the staff, as well as their own experiences within the institution. Olins (2008) reinforces the idea by pointing out that, not only is it necessary to direct aesthetic strategy towards the internal part, but also to unify a discourse for the external audience –legislators, politicians, journalists, investors and other collectives that generate opinion.

This adds to another important factor that, according to Vilalta (2013, p.19), has come into play over the last twenty years; universities have extended their traditional roles of education and scientific research, making a direct and indirect contribution to the social and economic progress of society. In an increasingly complex society and economy, which have become highly interdependent, universities are situated in a strategic social position to boost the knowledge economy. Nevertheless, public funding policies for R&D at universities require a greater presence from companies and an increasingly focused approach to the needs of the market – subsisting on a model composed of public subsidy and research funded with their own resources.

Therefore, I can say that identity programmes also help centres of higher education to structure aesthetic strategy based on elements of identity and visual language, which define an institution’s positioning and, through everything these elements are able to express to internal and external audiences, help it to prevail. In addition, as White (1989, p.34) points out, symbols play a very important role, at the very top of the hierarchy for generating a common thought, which is why it is necessary to ensure the symbolism is appropriate.
As explained in the previous chapter, there are several authors who have written about basic semiotic, functional and legal principles that these symbols should fulfil to be pertinent in their function. Keen (1989, p.79) agrees that these are also valid in the design of university trademarks, defining questions of meaning and function that should be complied with:

- Appropriately associated with the university
- Should be compatible with the public relations strategy
- Should be distinctive, simple, adaptable and attractive

The example of the thesis, the redesign of the basic elements of visual identity of the Universitat de Barcelona, represents a case that exemplifies all of these questions. On the one hand, as an institution spanning over five centuries, and according to the main ranking of bibliometric evaluation, it is the most valued in Spain. On the other hand, according to the governing body of the institution, there are elements of identity that do not represent it appropriately, and which pose a series of functional problems when they are applied. Furthermore, this problem is getting worse since, in terms of communication, the centre faces a new context in the field of higher education in Catalonia. As shown in figure 3.2., over the course of the last 30 years, the number of public universities, and recently also private ones, has been increasing, compelling the Universitat de Barcelona to consider a promotional strategy to seduce future students, professors and researchers, not only to maintain their academic activity index, but also to conserve leadership in scientific production and knowledge transfer.

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Figure 3.3. Evolution of the number of first and second cycle students enrolled in Catalan universities
Getting to know the problem

The start of the project can be placed in a conversation between the former Rector of the Universitat de Barcelona, the illustrious Dr. Didac Ramírez and the former publicist Lluís Bassat. This start may seem an anecdotal event but, as I will show, it will condition the project’s development, ensuring top level interlocution and a high capacity for strategic and operational prescription. The conversation is developed around a concern expressed by the Rector regarding the effectiveness of the university’s visual identity, asking the publicist for his opinion. Mr. Bassat argues that, for many years, the logotype has given great importance to acronyms, and over time this transformed into the UB abbreviation (fig. 3.7.). The result was that the internal and external audience of the institution popularised this abbreviation, and that socially it is used to name it. However, the opportunity to promote the Barcelona place name is wasted, and Mr. Bassat recommends a change in this sense, towards new basic identity elements (symbol and logotype) that synthesise the brand, while the full name of the institution "Universitat de Barcelona" is unequivocally expressed, thereby becoming more recognisable at an international level. Since the abbreviation "UB" for a scientist, student or researcher from outside Spain has little capacity to identify a particular place, prioritising that the main verbal sign will be the full name is recommended. In this way, it will be much more effective when it comes to knowing where the centre is from, while also taking advantage of the synergy that the "Barcelona brand" has generated in recent years.

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1 Lluís Bassat is a publicist with an extensive, renowned track record in the national and international advertising sector. He became Chairman of the WPP Iberia Group and a member of Ogilvy Worldwide’s board of directors. Now retired, he is a man who continues to have a great influence on communication issues within circles of power in Catalonia and Spain.
Pareja-Eastaway (2009, p.205) indicated, with the impulse of organising the Olympic Games in 1992, the city has made a great promotional effort to develop what is known as the "Barcelona brand". The cultural and technological industries were added to the sectors of higher education and tourism; the city promoting creativity and knowledge as engines for local development. This process, as the author indicates, has certainly attracted many talented businesses and professionals who were looking for an inspiring, comfortable place to live, thus stimulating successful projects. Nevertheless, the author warns of excessive "marketing” and trivialisation of the model, which should not ignore the necessary improvement and revitalisation of knowledge creation infrastructures: universities and research centres. That is why this consideration, which may seem exclusive to the institution’s strategy of aesthetics and promotion, must also be understood as contributing to the revitalisation of development policies for the city and country.

Vision and positioning of the institution

If I analyse the governing board’s programme the Rector proposed in the electoral process for which he was re-elected to office, the argument put forward by Lluís Bassat was in perfect harmony. The Rector proposed, among other things, that after a long process of changes brought about by new legislation, integration into the European Higher Education Area, and the reduction in funding caused by the economic crisis, it was time to recover leadership of the Catalanian university system and consolidate its international visibility. The combination of tradition and modernity had to make the university a leader in its four dimensions of responsibility: institutional, economic, academic and environmental. The programme also aimed to increase relations and proximity with prestigious international institutions to promote a scientific-educational policy that attracted talent, as well as expanding the educational offer oriented towards the international arena.

Communication is another key point in the programme, which claimed there had traditionally been a certain lack of contact with society, thus limiting possibilities to make its research and positioning visible. The programme proposed actions to project the University both globally and locally, as well as attaining clear, fluid communication channels; equally for digital media and internal relations. It also stressed that the history of the institution reflected the evolution of Catalanian society over the last
centuries and, therefore, relations with public administrations and social entities within this environment. Consequently, a clear policy of respect for tradition and the incorporation of modernity needed to be followed, where knowledge and territorial integration were the characteristics of a prestigious, urban university founded centuries ago. This governance programme, after the team was re-elected for a second term, was published and integrated into the Master Plan. The 2013-2016 Master Plan enabled the objectives and actions that would guide the governing board’s actions to be monitored during the four years of its mandate. This Master Plan followed the same philosophy of transparency and accountability as the previous one, and included the redesign of the identity device as one of the decisions implicit in its two hundred and thirteen actions and one hundred and twenty-seven tracking indicators.

Characteristics and context of development

In what seemed to be a fit between the objectives marked by the Rector’s programme and the problem detected by Bassat, the procedures established by the Statutes of the University were initiated and as indicated in Organic Law 6/2001\(^2\) the Social Council was convened to, among other things, oversee strategic issues that affected the centre and society. Once the Social Council has met, it agrees and approves a resolution to begin the process of redesigning the basic elements of identity for the University.

At the same time, Lluís Bassat puts forward my candidacy as a designer sufficiently competent to carry out the task. The reason he trusted me, according to him, was basically for two reasons: firstly, my professional career based on a portfolio of similar projects I had previously developed (see figure 3.1.) and secondly, a professional trust based on previous collaborations. It is worth mentioning that Bassat is retired from professional activity, and so did not act for lucrative motives, but rather to promote his public image and also, as a former student of the University, for emotional reasons. As Slade-Brooking (2016, p.149) states, no matter how much a methodology is developed to create a trademark, the final results are, above all, visual and thus appreciated in different ways by

\(^2\) Being an institution governed by that set forth in Organic Law 6/2001 of the Spanish State, all strategic decisions are part of the agreements and resolutions reached by the university’s governing structure. The rest are established by the collegiate governing bodies, such as the social council, the governing council, the university cloister and others, and on the other hand, by the individual governing entities, such as the rector, vice-rectors, general secretary, faculty deans, and others.
different people. This does not only depend on personal tastes, but also interpretations of aesthetic conventions and another factor that can be crucial: the past experience of the client when working with designers and, therefore, the confidence she is ready to place in them. Consequently, the trust and rapport the designer can build up with the client will substantially condition the credibility of the solutions proposed. Teaming up with Lluís Bassat will greatly facilitate the interlocution in these terms, not only for his persuasive abilities but also for his professional reputation. Napoles (1988, p.38) emphasizes the importance of the relationship between the designer / consultant and the organisation in ensuring a project is developed well. She goes on to say that the relationship must be empathetic, with mutual trust in the judgment and experience of the other part, which is indispensable in resolving conflicts.

On the other hand, given that the interlocution will be with the Rector, Deans of the different faculties and proxies that form the Social Council, the task will require arguing issues in a very precise way, avoiding aesthetic appreciations and presenting well-developed points at a theoretical and strategic level. Given that the project started as the result of a conversation between two people, the absence of a preliminary brief prepared by the offices that manage the communication of the University of Barcelona is clearly evident. This circumstance makes the design brief a key document in structuring the strategic positioning, and also to justify and validate the proposal.

Another relevant factor is that the interlocution is at the highest hierarchic level. This avoids a very common problem of interlocution in design projects that progress from executive to management levels, which often wrecks the creative process due to the repeated passing of phases and approvals, with the consequent considerations added by each of the interlocutors, and not always with the same criteria, rigor and objectivity, making it very difficult for the proposal not to be devalued. Whereas having a first-level interlocutor facilitates the shortening of this process and, being of the first hierarchic level, executed more effectively and diligently. As Olins (1978, p.173) asserts, this kind of project affects the strategic foundations of the organisation and, in order to have the greatest influence on the organisation’s culture, should therefore be managed from the highest hierarchic levels.
Analysis and characterisation of the elements of visual identity

A. Historic analysis and characterisation of the evolution of the identity devices for the Universitat de Barcelona

According to Martí (1999, p.82), every project is the result of a double action, the inventive act supported with the mimetic act, and vice versa. The oscillation between these two polarities marks the centre of project activity in any of the design disciplines. Mimesis is the set of facts that affect the project and which do not correspond directly to creative, innovative activity, but are the consequence of the opposite: the slow accumulation of knowledge covered throughout our evolution as a species. Everything new has its substrate in that which is old, and the necessary degree of innovation (more or less important in different historical moments) must be complemented by a corresponding degree of mimesis. Werkman (1974, p.139) places this idea in the context of trademarks, stating that in order to understand the design and content of contemporary brands, it is necessary to study the cultural trends of previous eras. Chermayeff & Geismar (2000, p.8) reinforce this idea by stating that one of the first needs when creating any type of identity, be it social, political, personal or corporate, is to know where it comes from. As mentioned previously, Slade-Brooking (2016, p.62) suggests analysing retrospectively: the history of the organisation, when it was founded, who founded it, what changes have taken place and making a visual timeline of how its devices have changed their visual identity over the years.

B. Visual timeline

The Universitat de Barcelona, founded in 1450, as a nucleus for forming future thinkers who would exercise power, intellectuality and ultimately develop culture, like other university centres, has been continuously subjected to the interests of the de facto powers, be they political, economic, or at times religious. A university is unlike the projects designers are accustomed to developing, which are circumscribed to a business environment, where often there is no document for us to make a sufficiently structured and sustainable analysis of why the identity elements are a certain way, or the historical evolution of the organisation that can influence us in design decisions. In the case of the Universitat de Barcelona, we have a lot of literature that not only describes the history of the institution, but also its changing fortunes, which allow us to analyse the "why" behind its signs of identification. Among all of this literature is a
study, "A brief study of the seals, shields and brands of the UB" that was produced by the Department of Institutional Relations and Protocol of the University, and drafted by Nasarre and Dilla (2015), which will serve as the basis for studying the evolution of the identity elements that the institution has had since its foundation in 1450. This study is composed of graphic testimonials that are dated and linked to relevant events that have marked the history of the institution. In parallel, we carried out an analysis of different literature regarding the history of the institution, developing a timeline to compare the evolution of its visual identity devices with that of its history. This analysis should emphasise the motivation of each change that occurred and thus validate the decisions we should take in successive phases of the project.
If I analyse the evolution of the visual identity devices of the Universitat de Barcelona, I realise that over the 550 years of its existence it has undergone 8 substantial changes, related, as we previously mentioned, to varying circumstances directly connected to political, religious and economic power. In addition, the conflict between the Catalanian and Spanish cultures must be mentioned. Since 1714, sometimes in terms of armed conflict, but mostly in intellectual and political terms, these cultures have continuously challenged each other, resulting in periods where their forces were balanced, and others where the supremacy of one erased the other. This convulsion has been the main factor in making the symbols of the University so changeable, and sometimes contradictory. Another important aspect that the analysis indicates is the symbolism surrounding the University building itself, and in what way it becomes the support for the application of the symbolic devices that represent it. The beginning of its construction represents the consolidation of the institution, accompanied by a renaissance of Catalanian culture and the economic and demographic growth of the city of Barcelona. Despite the political upheaval in the short period of its construction, according to Cirici (1971, p.149) and Triadó (1988, p.160), the architectural programme will end up configuring a sculptural display, especially on the façade, the staircase of honour and the ceremonial hall, replete with symbolic devices that respond to different attitudes ranging from the spirit of the Catalanian Renaissance to the period of monarchic Restoration and through liberal ideology. In the period of the Spanish Civil War, the Spanish royal shield on the main façade is substituted by the shield of Catalonia, and after the war, it is immediately restored. Given the catholic character of the dictatorship, the building is dressed with some religious elements, such as the tapestries with the figure of the Immaculada on the staircase of honour. It is also relevant that when democracy approaches, the shield of the university district is recovered, located above the doors that access the rooms of the rector and the ceremonial hall. In reference to this shield, it is worth noting that we can consider it the first that specifically identified the university centre, while those that had been used previously, sometimes in coexistence, were reference devices for public or religious powers. Another important fact is that the documentation consulted reveals it was the first to be used as a device of visual identity, identifying the university on many documents printed during the period from 1837 to 1932.

For PDF screen view, check Figure 3.6.
It should also be noted that, as this analysis has perceived, the relationship between the identity of the institution and the symbolism that represents it has not always been considered with the same importance. It has evolved from a more symbolic relationship to one more linked to visual communication. In short, it is evident that the communication needs towards its audience have changed along with its environment. In this sense, I can determine that it is not until the mid-1990s that there is a real awareness of the construction of a visual brand identity, which coincides with the emergence of competition in its territorial area, the establishment of the UAB and agreements with the state and regional government that approve the management of different universities in Catalan demarcations, including the Balearic Islands.

At this point, I should also take into consideration the relationships, established over the history of the institution, between the verbal and visual signs, such as seals, shields, logotypes, symbols and monograms. This varied catalogue of solutions also indicates that the use of one model or another can be decisive in adapting to the needs that the solution requires. In addition, the characterisation of the competitive environment can determine certain conventions assimilated by the audience in relation to the use of a specific model according to the institution’s positioning.

C. Analysis of the current elements of identity.

In order to understand the full effect of a trademark, Starling (2011, p.163) indicates that we must observe the elements that make up the design more deeply: the type (verbal sign), the symbols (visual sign) and the colour (visual sign). Each one alone can be a motivator of change. Rand (1993, p.52) argues that a well-established logotype is not necessarily a good one. On the contrary, in determining its intrinsic value, its quality, not its age, is the critical factor that must be validated. The initial process of the analysis will focus on this point, characterising the qualities of the elements of identity to measure their impact, effectiveness and meaning. Subsequently, the results will be contrasted rationally, using the synthesis of where the Rector and Mr. Bassat’s positions coincided regarding the devices of visual identity used by the institution. This process, as Keen (1989, p.16) maintains, should establish the ideas that define what the university is, where it is heading, and what it wants to explain about itself. Once the results are defined, they will affect most strategic decisions, as
well as determining whether the new visual identity will convey something appropriate and definite. As White (1989, p.31) also claims, the audit must respond to a key question: is the symbol representing what it is supposed to represent to the groups that interact with it?

At this point in the design programme, Olins (2008, p.31) recommends an in-depth analysis of the identity elements in order to detect the current problems affecting the organisation: if they are effective; if they work with a well understood, coherent system; if they present a memorable encapsulation of the idea behind the organisation; and if there is coherence in the formulation of the architecture of the identity elements belonging to different organisational divisions. Slade-Brooking (2016, p.62) recommends that each element of the current design be deconstructed to identify the graphic communication tools used, such as colour, font, logotype design, style. Then, the strengths and weaknesses of the current design should be defined.

In order to do this, I have the Manual of design guidelines, which defines the basic elements of identity and their application criteria. The manual was developed in 2011 by H2ò, a design studio accustomed to working on projects of this nature and, as such, it is a very complete document, both in the description of the elements of identity as well as in their systematisation in different communication media (see figure 3.6.).

Figure 3.7. Universitat de Barcelona graphic guidelines contents

A quick look at the document reflects two important issues. The first is that I am dealing with a perfectly executed document, and secondly,
that this quality indicates I am facing a problem not so much of formal execution, but rather of strategic and conceptual approach. I start the analysis from two perspectives: a formal study and an analysis of meaning. The second issue is that, on reading the manual I realise it only normalises the elements of identity for general use. At no time does it mention or normalise the use of the University’s historical shield, which is still used by the rector’s office on stationery and at institutional or academic events.

The current basic device of visual identity

The current device is configured by three clearly differentiated elements. The UB acronym is constructed with two circles, with the U in one and the B in the other, which are always arranged vertically and adhere to certain proportions (figure 3.7.).

The second element is the graphical synthesis of the façade of the historical building, which, according to the manual, can never be separated from the other two elements. It is also composed to specific proportions (Illustration).

The third element is the logotype, where the name "Universitat de Barcelona" is composed with the typography Carta ITC Regular, on two lines, one with "Universitat" and the other with "de Barcelona".


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<th>Standard version</th>
<th>Horizontal version</th>
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Figure 3.8. Universitat de Barcelona visual identity devices
The three elements are arranged so that the acronym is to the left, the synthesis of the building to the right of it, which is separated from the logotype by a line that is configured as the fourth element. From this distribution, two versions are available: one with the logotype divided into two lines, forming a more rectangular unit, and the other with the logo on a single line, configuring a more horizontal version.

If I summarise the morphology of the visual elements that make up the unit, I see two symbolic elements. The first is the acronym within the two circles, which, according to the manual, acts as a symbol since it can be applied without any other elements. Consequently, it is understood that it has the aim of becoming the identifiable element of first hierarchy. Then I note the second symbolic element, the façade of the historic building, which symbolically places the institution in history and the role it has represented throughout its existence. The logotype offers the descriptive name for the type of centre it is, together with its origin, while the line acts as a visual support to separate the building from the logotype. Finally, I consider blue as an element that also acts as an identifier, as described in the manual regarding signage applications and supports for all kinds of publications.

The manual also describes a series of variants for reproducing the unit on different colours, as well as a version composed only in black.

![Universitat de Barcelona visual identity elements morphological traits](image)

Figure 3.9. Universitat de Barcelona visual identity elements morphological traits

![Universitat de Barcelona basic identity elements analysis. Chromatic codes. Source: Our creation](image)

3.10. Universitat de Barcelona basic identity elements analysis. Chromatic codes.
The current shield

On the other hand, and as I have already mentioned, although not part of the content in the design guidelines manual, the rector is identified with the shield mentioned in the previous section. It is still present in some ornamental elements of the building and has been used discontinuously since the restoration of the institution in Barcelona, in 1837. The shield is made up of two well-differentiated parts. At the top, on a blue background, the face of Apollo is represented with golden rays emanating from it. Below this, with a curved base, is the motto of the university "Libertas perfundet omnia luce". In the other part, which is below the first, the shields corresponding to the four provinces of Catalonia appear, and also one for the Balearic Islands, that previously formed the university district. It is remarkable that the university has no rules describing criteria for its use or technical characteristics for reproduction.

Once this formal analysis of the basic elements of identity has been made, I see that while one offers all the necessary technical implementation information, the institution provides no information for the other in reference to its application. In the case of both the logotype
and the shield, I discern considerations that demonstrate strategic issues raised at the previous meeting with the Social Council:

- 1. Nebulous presence of the place name "Barcelona".
- 2. Excess of visual elements that make application difficult.
- 3. No technical information about the use of the historic shield.
- 4. Distance in meaning between the device and the historic shield.

1. Nebulous presence of the place name "Barcelona".

The first to be considered was the diffused presence of the Barcelona place-name in the construction of the identification unit. In order to measure its impact within the unit, I analyse the surface area it occupies.

![Diagram showing space occupied by graphic elements](image)

Figure 3.13: Universitat de Barcelona basic identity elements analysis: "Barcelona" toponym visibility

I set a grid with sufficient units to parameterise the space taken up by the different elements, and I verify what the surface area is without content but that delimits the clear space for the unit. Using a colour for the space occupied by the printed elements and another for the space occupied by the name "Barcelona", I verify that in the two standardised versions “Barcelona” occupies a proportion of 4.2% and 3.4% of the total space required for representation of the device, with 12% and 14.5% respectively, as a proportion of the total printed ink mark. Therefore, I verify that 88% in one, and 85.5% in the other, is used in ink to describe ideas other than the word Barcelona.
2. **Excess of visual elements that make application difficult.**

The second problem that I observe is the excessive presence of graphic elements the device contains. Specifically, as I have seen before, there are four, which means a clear relationship between the visual and verbal sign is not established – the direct relationship between a symbol and a logotype. This clearly impedes the establishment of a semiotic connection between a signifier and a meaning, in which the receiver of the image establishes an unequivocal relationship between the two elements. As Wheeler determines (2006, p.9), according to the science of perception, the brain recognises and remembers shapes first, while words must be decoded into meaning. One of the properties that visual identity devices should have is that the brain recognises their peculiar shapes, thereby being recorded more quickly into the memory. By having two visual elements, such as the acronym and the building, this process is carried out more slowly and some form of discrimination has to take place as to which of them has priority in the memory.

![Universitat de Barcelona basic identity elements analysis: Verbal and visual signs. Source: Own creation](image)

Figure 3.14. Universitat de Barcelona basic identity elements analysis. Verbal and visual signs

3. **Use of the historic shield.**

The third consideration refers to what I call the historical shield of the university, a device described previously, the origin and meaning of which has also been revealed. A first morphological analysis denotes a very complex composition, full of visual elements and changes of colour in a highly condensed space. This means when it has to be represented in a small size, which is generally the case, such as letterheads or business cards, or even the pin worn by the rector, its visual reproduction is extremely complicated to achieve. Another problem regarding the use of this shield in its present form is the amount of colours it uses; 7 to be precise. This problem is compounded by the previous one, since, on the one hand, if the device is printed with direct inks, it requires 7 colours, which is therefore a very expensive system of reproduction. On the other hand, logically, it is cheaper to print in CMYK, which is fine for large
formats, but for small formats, as the system uses frames to generate colours, these will ultimately blur the perceptual quality of the shield.

<table>
<thead>
<tr>
<th>7 tints</th>
<th>Metals</th>
<th>Colours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clr/Gold</td>
<td>Argent/grey</td>
<td>Azure/Blue</td>
</tr>
<tr>
<td>Argent/white*</td>
<td>Azure/Blue</td>
<td>Azure/Blue</td>
</tr>
<tr>
<td>Azure/Blue</td>
<td>Azure/Blue</td>
<td>Azure/Blue</td>
</tr>
<tr>
<td>Azure/Blue</td>
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<td>Azure/Blue</td>
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<td>Azure/Blue</td>
</tr>
<tr>
<td>Azure/Blue</td>
<td>Azure/Blue</td>
<td>Azure/Blue</td>
</tr>
</tbody>
</table>

![Image showing size reproduction requirements. Reduction text.](image)

Colour reproduction requirements. Full tone print required lists.

### Figure 3.15. Universitat de Barcelona basic identity elements analysis. Emblem technical analysis

#### 4. Distance in meaning between the device and the historic shield.

This analysis leads me to consider the distance, in terms of visual image, that exists between the basic elements of visual identity used in the generic communication of the university and the shield used by the rector. To this end, I create a comparative table of the two uses.

![Image showing comparison of devices](image)

### Figure 3.16. Universitat de Barcelona basic identity elements analysis. Uses and meanings of the devices

for each device and also the functions and symbolic value that can be attributed to each one.

What this analysis concludes is that in terms of the visual language each device uses, the shape they have, their usage as well as the symbolic value attributed to them, in none of these aspects does their formalisation coincide. I should add that one of the main difficulties generated by this
variety of visual signs is that it hinders the construction of a visual brand hierarchy, as seen in the previous chapter (Fig. 1.1). The necessary hierarchic discrimination between the acronym, the building and the shield blurs the effectiveness of communication. Whereas, a structure capitalised by a strong, clear, unequivocal symbol is capable of endorsing any element of the institution’s communication.

As a summary for this phase of the project, I propose a series of strengths the current identity possesses, together with a series of weaknesses the new proposal should resolve.

**Strengths:**
- Good management of the corporate image has resulted in a high recognition of the visual identity in its different fields of representation: academic, social and business.
- The use of the acronym "UB" has made the institution it represents accessible, friendly and easily recognisable.

**Weaknesses:**
- Diffused presence of the Barcelona brand.
- Excess of signs that hinder, in terms of semiotics, an unequivocal interpretation.
- This excess, in formal terms, causes the identification unit to lack compactness and require too much surface area to be visible.
- No linking of meaning, nor visual style, between the visual identity elements used by the Rector and those used by the University itself.

D. **Analysis and characterisation of the elements of identity of the university sector**

One of the most important tasks in managing identity through aesthetics is to associate the company and its brands with the affiliation of a certain style, thus carrying out very important functions, such as supporting its notoriety; causing intellectual and affective associations; differentiating products and services; and helping consumers to classify products and services by establishing affinity relationships (Schimtt & Simonson 1998, p.112). According to Batey (2012, p.145) consumers and users mentally group products and services in categories, and tend to operate at a very basic level of abstraction, analysing the superficial properties of the offer to determine physical similarities. Although neither
the internal nor external audience will make a rational analysis as I do, it will be useful for me to understand how they categorise or group offers at this level of abstraction, as it will indicate how they recognise them. Accordingly, once the current identity elements have been analysed, and the strengths and weaknesses of the identity summarised, it seems appropriate to study the visual characteristics of the environment where the offer similar to that of the university operates. That area which represents direct competition for the territorial environment and which should enable me to understand the opportunities that can be generated, comparing the visibility of all the brands. It is also necessary to study what the international environment represents, the reference of excellence, and the assumptions that can be linked to the idea of a university that is a leader in one of its fields. Keen (1989, p.18-19) confirms this when he recommends making comparisons with the visual styles of other universities, and as he says, systematising comparatives can reveal what has always been there but no one ever noticed. Chaves and Bellucia (2003, p.91-92) call it the characterisation process. They consider it the first basic task in the management of the project; distinguishing the subject by analysing the characteristics of the sector in which it is registered and defining the particular nuances that make it unique. Also, identifying the entity or entities it aspires to resemble. And finally, the detection of what they call graphic paradigms: identifying is the process of registering in a category and discerning what does not belong there; based on the universe of identifying signs in the sector, detecting those stylistic paradigms relevant to the organisation.

One of the tools to measure or establish these parameters of relevance is the benchmark. This is a collection of relevant cases, following established parameters for the collection of samples, which will enable the measurement of how the subject’s surroundings behave visually, as well as revealing what the qualities are that determine the visual standards of belonging to the sector. This tool is valuable since it displays an empirical reality, given that existing cases are analysed and unequivocal conclusions are drawn that transcend the subjectivity a creative proposal may pose. This is remarkably useful when it comes to establishing starting points, and as the word benchmark says, it sets a measurement, prior to the action, that determines a reference which I should, or should not, move towards.
In order to elaborate the Benchmark and characterise the sector it is essential to define:

- **Criteria for collecting samples.**
- **Source for the collection of samples.**
- **What analysis will be carried out.**

**Criteria for collecting samples**

The collection of samples will respond to four areas of competence where the Universitat de Barcelona wants to be represented: at local, regional, state and international level. In terms of local and regional scope, as described in the thesis of Montull (2017, p.125), if the perspective we analyse is the enrolment of new students, the local and regional areas are the most relevant, since they represent almost 90% of the origin of new students. He also defines the scope of the university centres that correspond to the educational offer of first preference, which consist of 8 public universities and 4 private ones.

As seen in figure 3.17, the enrolment of new students in Catalan universities is fed mostly by new students whose family residence is in the same province or region, while students coming from the Spanish state are scarcely representative. Nevertheless, the fact that the Universitat de Barcelona is also a leader in terms of excellence among Spanish institutions, it is necessary to characterise them, as they compete with each other in the rankings of excellence for research and knowledge transfer. As Margulies (1970, p.36) maintains, the strategy of an organisation that aspires to be a leader in its field, must necessarily project an identity that is clearly that of a sector leader. As Taylor and Braddock (2007, p.245) point out, in recent years, there has been a
noticeable increase in systems for the comparison and classification of universities. The authors emphasise that it is necessary to make a distinction between those systems that measure excellence with those that evaluate institutions as an aid to a potential “customer”. And they distinguish between the reputation of a university, in other words a perception of excellence, thanks perhaps to an illustrious past or good publicity that is undeserved, and its underlying quality; results obtained from systems that measure the quality of teaching and research.

Both in Spain and internationally there are various organisations that measure the excellence of university centres with different methodologies. As defined by Carrocci and Robinson (2013, p.575), university classification, as a classification system, regardless of its accuracy, constitutes a form of disciplinary power, a taxonomy that functions as a hierarchic power technique producing "winners" and "losers". This thesis does not aim to go into depth regarding the quality and ethics of these systems, but as Taylor and Braddock (2007, p.245) indicate, they are an accomplished fact, they incorporate information, and even though they are not ideal, they have some value if they are used in an informed way.

As we can see in figure 3.17., the Universitat de Barcelona considers them as a valid measure on its own website, and is proud to be present in the top positions of the five it considers to be the main rankings of international reference.

![Figure 3.17.](http://www.ub.edu) (2018). Universitat de Barcelona. [Accessed 22 November 2016]

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Spain position</th>
<th>Europe position</th>
<th>World position</th>
<th>Last update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Rankings of World Universities AWRU</td>
<td>1</td>
<td>67</td>
<td>151-200</td>
<td>August 2018</td>
</tr>
<tr>
<td>THE World University Rankings (WUR)</td>
<td>3</td>
<td>117</td>
<td>251-250</td>
<td>September 2016</td>
</tr>
<tr>
<td>QS World University Rankings (WUR)</td>
<td>1</td>
<td>89</td>
<td>156</td>
<td>June 2016</td>
</tr>
<tr>
<td>U.S. News Best Global Universities</td>
<td>1</td>
<td>24</td>
<td>96</td>
<td>October 2016</td>
</tr>
<tr>
<td>Center for World University Rankings (CWUR)</td>
<td>1</td>
<td>34</td>
<td>122</td>
<td>July 2016</td>
</tr>
</tbody>
</table>

Figure 3.18. The Universitat de Barcelona in the most outstanding international rankings

Although these rankings, as we have seen, are not alien to ethical considerations, they are a useful tool to establish a criterion for the collection of samples. These will be used for the characterisation of the basic elements of identity of the institutions that occupy the first
positions, and as such considered by public opinion to be references in Spain and internationally.

According to the report published by Webometrics Ranking of World Universities (WRWU), in the rankings group for universities, a total of 26,368 centres appear. It is not impossible, but beyond the scope of this visual identity programme, to characterise them all. Therefore, I have to determine a criterion in relation to a number of centres that are representative of international excellence, and that the Universitat de Barcelona can project as a growth horizon. One of the criteria that could determine the personality of university centres is their location and influence on the territory. In order to define the geographic demarcations that are listed in the rankings, I will analyse the origin of the centres that appear in the first 200 positions of the 5 most popular international rankings according to a 2016 International Student Survey.

### Distribution of the number of universities that appeared in the first 200 positions of the 2015-2016 academic year in the most popular rankings according to the 2016 edition of the International Student Survey distributed by geographical area. Own creation.

<table>
<thead>
<tr>
<th>Ranking</th>
<th>from USA</th>
<th>from UK</th>
<th>from EU+EFTA</th>
<th>from Asia</th>
<th>from Canada</th>
<th>from Australia</th>
<th>from other places</th>
</tr>
</thead>
<tbody>
<tr>
<td>QS Quacquarelli Symonds Ranking</td>
<td>49</td>
<td>24,5%</td>
<td>30</td>
<td>15%</td>
<td>59</td>
<td>29,5%</td>
<td>36</td>
</tr>
<tr>
<td>Times Higher Education World Universities Ranking</td>
<td>63</td>
<td>31,5%</td>
<td>33</td>
<td>16,5%</td>
<td>70</td>
<td>35%</td>
<td>14</td>
</tr>
<tr>
<td>Academic Ranking of World Universities ARWU</td>
<td>71</td>
<td>35,5%</td>
<td>21</td>
<td>10,5%</td>
<td>60</td>
<td>30%</td>
<td>23</td>
</tr>
<tr>
<td>U.S. News Education Ranking</td>
<td>74</td>
<td>37%</td>
<td>21</td>
<td>10,5%</td>
<td>61</td>
<td>30,5%</td>
<td>22</td>
</tr>
<tr>
<td>The Center for World University Rankings CWRUR</td>
<td>82</td>
<td>41%</td>
<td>16</td>
<td>8%</td>
<td>25</td>
<td>27,5%</td>
<td>24</td>
</tr>
<tr>
<td>Average</td>
<td>67,8</td>
<td>33,8%</td>
<td>24,2</td>
<td>12,1%</td>
<td>61</td>
<td>30,5%</td>
<td>23,8</td>
</tr>
</tbody>
</table>

**Figure 3.19.** Distribution of the number of universities that appeared in the first 200 positions of the 2015-2016 academic year in most popular rankings according to the 2016 edition of the International Student Survey.

As we can see in figure 3.19, the geographic areas that are clearly represented are: USA (33,9%), European Union (30,5%), United Kingdom (12,1%), Asia (11,9%), Australia (3,9%) and Canada (3,7%). It should be noted that the British institutions, although in third place, display a substantial presence in comparative terms as they represent a small geographic area with less population. Also, the European Union will be for PDF SCREEN VIEW, CHECK **FIGURES 3.20, 3.21 AND 3.22.**

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2 The "Webometrics Ranking of World Universities" is an initiative of the Cybermetrics Lab, a research group belonging to the Consejo Superior de Investigaciones Científicas (CSIC), the largest public research body in Spain. The Cybermetrics Lab, part of the CSIC, is devoted to the quantitative analysis of the Internet and Web contents, especially those related to the processes of generation and scholarly communication of scientific knowledge. This is a new emerging discipline that has been called Cybermetrics or Webometrics.

4 The survey is notable in part for its scale and reach, and Hobsons was able to compare responses from a sample of just over 34,000 prospective international students over the last three years. The ISS provides an interesting window into the most-popular rankings among prospective students.
more representative for our case, as it represents a space of concurrence that is highly varied culturally and connected to the same academic environment of research and knowledge as the Universitat de Barcelona. If I set the analysis framework around the top 100 positions of these rankings, classify them by geographic areas and compensate the representativeness that we want to give to each one, it leaves 94 centres distributed according to the position that they occupy in any of the 5 rankings: the first 16 positions for American universities (20 cases), the first 16 for British universities (21 cases), the first 16 for Europe (28 cases), 8 for Asia (13 cases), 4 in Australia (6 cases) and 4 from Canada (6 cases). In the case of Spanish universities, I will apply the same criteria and we will take samples of the first 16 positions (28 cases) occupied in the 5 international rankings and the 5 national rankings\(^5\). And finally, to consider the local and regional level, I will characterise the 8 public universities and 4 private ones that offer undergraduate studies in Catalonia. In total I will characterise 127 universities.

**Source for collecting samples**

The Webometrics Ranking of World Universities was born as a research project to promote scientific publication through the web. However, as the centre acknowledges, the indicators that are displayed are very useful for classification purposes, since they are not based on the number of visits or the design of pages, but in the overall performance and visibility of the universities. Today, the website has become one of the main means of promotion, information, management of companies and institutions. According to the 2017 edition of the survey "Use of ICT and Electronic Commerce (EC) in companies 2016-2017" that the National Institute of Statistics elaborates annually, 97.43% of companies have a web page in Internet. In addition, due to the swiftness of updating content, the identity elements are constantly updated. Physical supports suffer from the molecular condition, meaning that they exist. Therefore, if the identity changes, the object must be replaced. In the event that an organisation changes its visual identity, it will require the physical replacement of all its supports. This, more often than not, is physically impossible to do immediately, since all those materials that remain outside the scope of the organisation’s property persist in their form and

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sometimes their function. Other times, due to the scope that the substitution supposes, this is done gradually in phases, which perpetuates a feeling of instability and incoherence. In contrast, digital media, which only depend on the taking of a decision, can be replaced at that moment. Consequently, I can consider the web environment in the university sector to be more reliable than physical and material environments. Hence, the main webpage of the university becomes an easily accessible source for sample collection, which is up-to-date and reliable. Only in the event that the organisation had a residual presence in this environment, should I not consider it. However, this is not the case in the university sector, since online management and the promotion of the institution’s educational offer are mainly rooted in these environments, which are highly adapted to the culture of young people. Furthermore, digital environments are much more economically sustainable, if I compare them to the print production of all the communication media necessary to achieve the same impact.

Criteria for analysing samples

As Chaves and Bellucia (2003, p.92) recommend, in order to carry out the characterisation, you need to know the models, trends and graphic qualities of the sector in order to assess the line or general stylistic lines that must be registered and which are contradictory to the institution’s profile. An analysis matrix is prepared, headed by the sample collected on the main web page of the university, that which appears in the first hierarchy of its header. An institution may have other variants of the device, but we understand that it can change the order between the verbal and visual sign, or the application criteria may change if it is on a white background as opposed to a colour background.
To carry out the characterisation, an analysis matrix is established that focuses on collecting samples corresponding to the basic device of visual identity, and from these samples, the name, the year of foundation and the motto of the universities are determined. In terms of the characterisation of graphic qualities, the type of relationship established between the visual and verbal sign is identified. Specifically, if it is a device I consider historical, such as shields, monograms and seals, or if it is a verbal sign with a creative design based on no precedent. In the verbal sign, I also characterise the typeface used in a basic model of typographic classification: Roman, Sans serif, Egyptian, neoclassical, rounded and calligraphic letters.

The objective of this characterisation must be to identify the graphic characteristics of the identity devices of the university institutions that represent international, national and local excellence. And to determine if certain similarity can be identified according to the geographic region of origin, the year of foundation, or if there is any relationship with a character that markedly favours a particular discipline, such as technology, medicine, economics, etc.

To display the results, figure 3.23, I will use a table to order the number of cases for each model of relationship between the verbal and visual sign, and how many correspond to universities founded before 1800, between 1800 and 1900 or after 1900. I will display, in the same way, how many cases correspond to the use of a given font. I can also analyse how many of them are clearly identified as the combination of a verbal and visual sign, and from these how many are interrelated or combined.
Characterisation of results

a. Results corresponding to the international sphere

Benchmark device characterisation results. Source: Own creation.

United States of America

I note that from the 20 cases corresponding to American universities, there are two main characteristics in the analysis of the graphic features of the visual identity devices. The first is that 75% of the institutions identify with shields or seals, and that 70% of the fonts used are Roman letters. If I study these data more closely, it is relevant that of the universities founded before 1800, 80% use shields, while from those founded after 1900, 100% use seals.

United Kingdom

In the case of universities in the United Kingdom, I see a marked presence of devices formed by shields, which represent 42.8% of the 21 cases analysed, with none of them corresponding to universities founded after 1900. There is also a certain use of a verbal sign model that does not correspond to historical devices with 28.5%. With the typeface, as in the
previous case, Roman typography is the most used, in 61.9% of cases. It is also relevant that none of the cases corresponds to the combined relationship between the verbal and visual sign.

In the case of the area corresponding to the European continent, I note the predominant use of seals, with 39.2% of the 28 cases, and the use of non-historical models with 25%. There is also a moderate presence of the use of monograms as combinations, which do not establish a clear differentiation between the verbal and visual sign. In the use of typefaces, and unlike the two cases analysed previously, the use of Sans serif typefaces prevails over the others, and 4 cases combine different typographic styles.

For university centres on the Asian continent, although the use of seals is more prominent with 38.4% of the cases, three models with balanced percentages prevail: shields, seals and non-historical symbols. In the section on typefaces, the use of combining different typographic styles stands out. This is because 69.2% of cases describe their name bilingually, using logographic writing to express the name in the local language and alphabetical writing to do so in English.
Australia is clearly characterised, as 100% of the 6 cases analysed use the combination model of a shield with a verbal sign. In the use of fonts, it is divided equally between Roman, Sans serif and Egyptian typefaces.

In the case of Canada, as I observed in Australia, of the 6 cases characterised 5 are composed of a shield and a verbal sign, the exception being the University of Montreal; belonging to the French-speaking area, it uses a monogram and a verbal sign. The most common typographic styles are roman typefaces, with 4 cases, and for the others, one uses a Sans serif typeface and the other a combination of Roman and Sans serif.

From this characterisation some relevant conclusions can be drawn. The first is that 93.7% of the cases analysed follow a well-defined scheme of combining a verbal and visual sign. The most widely used models, totalling 79.6% of the cases, are combinations of logotypes and shields (32.9%), logotypes and seals (27.6%) and logotypes with non-historical...
symbols (19.1%). In reference to the use of typography, the most widely used font style is Roman, followed by Sans serif, while a notable presence of 16 cases (17%) combine different typefaces.

b. Results corresponding to the national sphere (Spain)

Out of the 33 cases analysed, 27.2% use non-historical models, while the most commonly used model is seals (21.2%) followed by Monograms (18.1%). When comparing the data extracted from this characterisation with the international examples, I see they are similar to the European area. It should also be noted in the case of Spain that 66.6% of cases (22) correspond to universities founded after 1900, and 14 were established in the period of the democratic transition. In the use of typography, the presence of Roman and Sans serif typefaces is evenly balanced.

c. Results corresponding to the regional sphere (Catalonia)

The first notable piece of data from the regional area – where most Catalanian students prefer to study – is that the only university with a continuous history since its foundation in 1450 is the Universitat de Barcelona. The universities located in Girona, Lleida and Vic, originally founded in 1446, 1300 and 1599 respectively, cannot be considered the continuation of those institutions. Of the 12 Catalanian universities, 2 were founded in the 70s, 8 in the 90s and one in 2003. This may be the reason why none of the cases analysed use the most recurrent models.
from the international sphere: seals and shields. In Catalonia, half of the cases use non-historical symbols and the other half are distributed between monograms, logotypes combined with non-historical symbols, logotypes and 2 cases in which varied compositions between a verbal and visual sign are used. In terms of typefaces, as in the national sphere, Roman and Sans serif are equally distributed.

d. Results of characterisation corresponding to the age of the institution

The Times Higher Education produces a world ranking of the best universities that are more than 400 years old, where the Universitat de Barcelona appears in 24th place.

FOR PDF SCREEN VIEW, CHECK FIGURE 3.35. and 3.36

The analysis and characterisation of this data will be valuable to verify whether the identity devices of these centres follow a distinct way to express visually.

Benchmark devices characterisation Results. Source: Own creation.

<table>
<thead>
<tr>
<th>Sample Type</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Name CODE</th>
<th>Text Style</th>
<th>Name CODE</th>
<th>Name CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 Cases</td>
<td>6</td>
<td>10</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>Combined</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>100% %</td>
<td>24%</td>
<td>40%</td>
<td>12%</td>
<td>0%</td>
<td>0%</td>
<td>4%</td>
<td>20%</td>
<td>%</td>
<td>52%</td>
<td>44%</td>
</tr>
</tbody>
</table>


Figure 3.37. Benchmark devices characterisation results. World’s 25 best universities over 400 years old

Clearly, on reading the results of the characterisation, a predominant presence stands out, with shields and seals used in 64% of the cases, and only 16% corresponding to other non-historical models. It should be noted that 20% of the remaining cases are formed by identity devices that combine different visual and verbal signs, but in 4 of the 5 cases the combination includes the presence of a founding seal combined with symbolic expressions not belonging to historical models. As for typography, once again the balance is repeated between Roman and Sans serif styles.
As I have seen in the analysis of the current identity devices for the Universitat de Barcelona, a certain ambiguity was detected between the verbal and visual sign, which were not clearly differentiated. However, in the characterisation of the university sector, many of the devices clearly distinguish the visual sign from the verbal. In order to verify this, I analyse the degree of ambiguity perceived in the cases studied and make a classification of relationships between verbal and visual signs.

Figure 3.38. Verbal sign and visual sign combinations taxonomy

Next I take all the cases I have analysed, discarding repetitions that appear in both the Catalanian and Spanish rankings, as well as any repetitions from universities with more than 400 years of history. That leaves a total of 139 cases.

Figure 3.39. Total cases verbal sign and visual sign unambiguity perception

The results show 70.5% of the cases use a combination that clearly differentiates the verbal and visual sign. 12.2% maintain this differentiation but also incorporate an accessory, often to emphasise the text and sometimes to separate the two signs. Considering these two types as those that most clearly differentiate the signs, a group is formed that accounts for 82.7% of the total cases analysed.
Conclusions from the characterisation

The results from the characterisation of the international and national / regional environments show that, depending on the geographic area considered, certain differences are perceived in the predominance of specific models of visual identity devices. In contrast, the typography used is generic: Roman and Sans serif typefaces.

The other important conclusion is that visual expression can, to a certain extent, be characterised in terms of a university’s specialisation or the conventions associated with its historical or technological character. The universities founded before the nineteenth century clearly denote their past in their identity devices. Universities from a medieval tradition mostly use heraldic shields or founding seals, whereas technological specialists, that appeared much later and are linked to science and technology, use modern seals or monograms. There is a trend from the Anglo-Saxon world, where universities favour the use of heraldic shields, which extends to countries that have been part of the Commonwealth. On the other hand, European universities tend to use their institution’s founding seal. After analysing these institutions, I realise that there is a certain culture surrounding the university world. Many of them are institutions founded in the Middle Ages, and while they come from different traditions, they share certain conventions that enable me to identify them as such. These could be the way they are organised, or the rituals and ceremonies they share, the similarities in their clothing, or the fact that most of them have a motto. And as I have seen, their symbols and identity elements follow certain patterns of formalisation. Due to the singular nature of this culture, it is clear that the sector has its own identity.

Another important factor is that most of them clearly differentiate the verbal sign from the visual sign, building a clear relationship between the name and the symbol that represents it.
Drafting of the design brief

I have identified the client, determined to which sector it belongs and what the generic characteristics are that make it peculiar to its direct environment. I know the vision and positioning of the institution, having also identified the existing problems it has in consolidating its position through an effective communication to its internal and external audiences. In addition, I have first level interlocution, which means directly with the decision makers of the university’s strategic policies. This requires me to provide a creative approach supported by a solid theoretical base that avoids subjective appreciations, grounded instead on objective assessments of an empirical nature. In order to achieve this fundamental base, I have analysed the visual identity devices related to the university from three perspectives. Throughout the history of the institution, which has enabled me to verify that these devices changed greatly due to political and social shifts. I have analysed the elements of identity that are used today, which has allowed me to detect different problems related to their relevance, functionality and the diffused distinction between the verbal and visual sign. At international level, I have verified there are certain relationship patterns resulting from geographic origin, the specialisation of the centre or the year of foundation, which are all interrelated with the devices of visual identity. Finally, I have also verified that, in most cases, the relationship between the verbal and visual sign is clearly differentiated.

All this analysis should help me to define the framework of relevance for the graphic proposal. Vignelli (2008, p.18) in his book The Vignelli Canon emphasises the importance of establishing this framework, as it becomes the specifics in any problem raised, and defining it will help us avoid taking erroneous directions or alternative routes that possibly lead to inappropriate solutions. On the one hand, relevance seeks approval from the client, allowing a theoretical approach to the problem and its solution. And on the other hand, relevance helps the designer to take a certain position creatively. Vignelli (2008, p.18) reaffirms this pointing out that relevance transcends any questions of style, and while there are many ways to solve a problem, relevance will lead me to the appropriate type of medium, scale, materials, expression, colour and texture, and can even determine the look of the project.
Accordingly, for the redesign of the visual identity elements for the Universitat de Barcelona to be relevant, the elements must meet the following requirements:

**A.** Given the international projection of the Barcelona brand. The new graphic proposal must have the name Barcelona as the most visible element of the composition between the symbol and the logotype, relegating the acronym to an integrated form within the logotype.

**B.** The proposal must simplify the relationship, from a semiotic point of view, between a single symbolic element and a single descriptive element. That means it should be composed of a well-differentiated combination between a visual and verbal sign.

**C.** The change should only affect the first hierarchy of the basic elements of visual identity. Therefore, it must be respectful of the existing complementary elements of identity: the corporate typography (ITC Charter), corporate colours (Pantone 285 and Pantone Process Black) and the composition criteria for communication systems. As seen in Figure 3.38, it will only affect the expressions that correspond to basic elements of the first hierarchy.

**D.** The proposal should formulate a version for the organisation’s general communication, and another that has an institutional tone for the exclusive use of the rector and for ceremonial events. Maintaining the hierarchy of the
communication elements generated by the rector’s office, these must have a visual relationship with the communication generated by the rest of the institutions at the Universitat de Barcelona.

**E.** As I have concluded in the characterisation of the sector, it would be appropriate to recover one of the historical devices of the university in order to convey the idea of an institution with a long tradition, which is part of the group of older universities in Europe. However, it must also project the future, leading the rankings in universities of excellence in Spain and southern Europe.

This brief establishes the framework of relevance from which, as a designer, I will position myself creatively; based on the contextual analysis of the problem and my experience in the use of graphic design tools. These range from typography, colour and composition, to the mastery of visual effects that must be obtained so that visual expression complements the requirements of meaning, visibility, adaptability, durability, attraction, and singularity so it can be registered as a trademark. The task of the designer, once the mandates that define the design brief have been integrated, is to transfer them to the creative process, transforming theoretical questions into graphic forms that respond to perceptive conventions that the audience will interpret in the manner proposed by the mandate. As we can see in figure 3.39., the validation of relevance between the meaning and the creation must be carried out in parallel. This is the part of the creative process that is furthest from systematisation, as it opens a space for speculation: the first is whether these conventions respond or not to a certain interpretation. At this point, the study and characterisation of the sector where the offer is located can be of great help to understanding the general visual expressions of the competition, since this will determine what has been integrated as conventional in the culture of the audience. And the second will be to what degree the designer must innovate, taking the assimilated conventions to the limit. In order to ensure it has sufficient personality, it will become more novel when moving away from these conventions, and more conservative, with greater continuity, when moving towards them.
This degree of speculation should not be transformed into a debate about the client’s tastes and emotions. I have previously defined two agreements that establish the commitment between the two parties. Firstly, assertions should be in accordance with the framework of relevance formalised in the design brief, which establishes the mandates according to an objective analysis of the problem. Secondly, my experience and the portfolio of projects I have developed suppose a level of trust the client deposited in me at the time of hiring me.

In conclusion, the suitability of a proposal must be validated in a responsive way for each of the 4 methodological principles. The relevance of this issue is key, as not establishing it before initiating the proposal could relegate the validation, irreversibly, to a time when the solution has already been integrated into the process of communication with the user / consumer.

**Design process**

The design process is the part of the project where the result of the research, and the analysis of the contexts to be considered, is converted into a specific formalisation of the relationship between the verbal and visual sign. Slade-Brooking (2016 p.124) and Kevin et. al. (2010, p.86) point out that this is the time to decide on the type of creative strategy to be followed to develop the new visual identity. Regardless of the strategy, its effectiveness will depend on the command of the three basic resources used by a graphic designer to produce visual communication: typography,
colour and shape. And it will be a profound knowledge of these resources that will condition the synthesis, in its most concise expression, of what the mandate requires.

The first strategy in defining how the design brief should be approached is whether to start from scratch or find synergies in the current identity that allow me to move towards the goal. Olins (1978, p.184-185) characterises different degrees of change: it can affect the name, it may imply a totally new identity, involve a modification to an existing one, or it can imply the creation of a new brand architecture. As explained in the section on motivation, designers should be careful in this regard, since we tend to approach a project with a pre-conditioned idea of change. We understand creation by thinking more about the future than retrospectively, which is why we are inclined to create influenced by new trends; drawn to what is considered current and modern, leading us to forget the "before" and focus on the "after". In this sense, Olins (1978, p.192) is critical of some strategies that seem to be orthodox design activity but which, paradoxically, elude risk-taking in creative positioning. The author defines it from two perspectives. On the one hand, there are clients who want to obtain a safe, reassuring result, born from the austerity of a historical, distorted Bauhaus tradition. On the other, many avant-garde designers place the style of predominant trends before orthodoxy to impress colleagues of the profession. This, he affirms, has resulted in a panorama of boring, repetitive and superficial designs that form a parallel panorama, which ignores the necessary wealth and variety of visual identity devices for the different areas in which the products and services operate. Rand (1993, p.54) points out that the strategy of change is not enough in itself. There is a widely held belief among designers and clients that a new or updated design will, like a talisman, miraculously transform any business. While it is true that the redesign of a trademark implies something new, this is a temporary impulse, unless the actions of the company as a whole are consistent with this reformulation. This bias sometimes leads to abuse, with consequences that often mean, in hindsight, that this attitude has not always been the most effective and reliable; proving to be erroneous in many cases. Wildbur (1982, p.34) says that often trademarks are deliberately not changed because the period element of the design has a very real value in highlighting its traditional virtues, and if they evolve, it is to make them more adaptable to different media of communication. Beyond these motives, Olins (2008, p.87),
Starling, (2011, p.220) and Slade-Brooking (2016, p.62) recommend change only when an organisation introduces a new corporate vision or central idea, and that this decision will be critical, as the new visual identity will have to represent a new reality. On the other hand, it is also crucial to consider that change may not always have a positive effect, since, as Slade-Brooking (2016, p.62) states, your intention is to change position in the minds of consumers and competitors.

The problem of habit represents an important issue since when a logotype, which has existed for a long time, is altered, in design or colour, as Rand (1993, p.54) warns, it comes as a shock for those who were accustomed to the previous version. According to Keller (2013, p.156), an excessively radical change can disturb consumers or damage the image created through past investments, while, paradoxically, minor changes may miss the purpose if consumers do not perceive these changes.

The strategy taken by the designer on a new design or redesign will translate into different degrees of intervention and generation of new symbols. In terms of creativity, one differs significantly from the other, since the methodological approach will vary greatly if you start the process from scratch, rather than from a point where the reference is something that already exists. Nevertheless, either way, it will still need to be processed and questioned. According to my experience, between these two extremes, I can find situations where it is not clear whether I should redesign or newly create. The critical points in this difference are those that differentiate the methodology of action. Having a defined starting point means not having to question all the variables, as in a good number of cases, when the commission is framed as a process of redesign, there are many possibilities of anchoring the update to one of the existing elements. To a certain extent, you favour those aspects that allow the image to be processed towards what has to be validated in the design brief.

The strategy that must be taken in the case of the Universitat de Barcelona, and as defined by one of the points in the design brief, is the redesign of one of the devices historically used by the institution. In the characterisation of the current identity elements, I have identified two very different and contrasted realities, such as the identification unit formed by circles and the building, which has been shown to be inadequate with the positioning of tradition and modernity. I choose to
take a polarized decision towards the option of redesigning the historical shield, restored in the period of democratic transition, which is present in the ornamental corpus of the building and represents a historical reality that evokes the individuality of the territory. It is also significant that the analysis advises against a midpoint between the two devices, as it would make a harmonic solution impossible, given the substantial differences in meaning.

One of the factors that also supports the position of redesigning the historical shield, is the idea expressed by Park et al. (1986, p.136), who distinguish three concepts associated with trademarks: functional, symbolic and experiential concepts. These, help resolve problems and offer flexibility in positioning. A trademark with a functional concept is characterised by being designed to solve externally generated consumer needs. On the other hand, a trademark with a symbolic concept, like the historical shield of the Universitat de Barcelona, is designed to associate the individual with a desired group, role or self-image. Symbolic needs are defined as desires for products that meet internally generated needs for self-improvement, role position, group membership and ego-identification. The experiential concept corresponds to trademarks designed to meet internally generated needs for stimulation or variety, and respond to the desire for products that provide sensory pleasure, variety or cognitive stimulation. As the authors point out, many brands offer a mixture of symbolic, functional and experiential benefits and that it is possible to develop a brand image with two or more concepts. In selecting the concept, macro-environmental trends, the interested public and the internal members of the organisation must also be considered. Consequently, while a mix of concepts is feasible, I believe that in redesigning the historical shield of the Universitat de Barcelona, the symbolic concept should prevail over the others. Keen (1989, p.80) adds that, generally, universities do not have high budgets to configure an identity with an abstract element. He affirms that although a trademark can be distinctive without being readily identifiable, this requires a large economic investment in the media, which is why it is advisable for universities to use devices that have some visual quality which connects them to the institutions they represent. The easiest way to achieve this is ensuring the visual sign encapsulates one of the most characteristic features of the institution.
The design process strategy is defined in the following terms: given that I have to obtain a trademark that clearly distinguishes the verbal sign from the visual sign, I will separate the process into two creations. The first, the verbal sign. This process will be conditioned by the design brief, which requests limiting the redesign to elements of the highest hierarchy while keeping existing complementary elements. This means composing the logotype with the typography already used by the university, ITC Charter. For the elaboration of the visual sign, it will be the redesign of the historic shield that began to be used in 1857, with the establishment of the university district, and was then recovered in 1970, since which time it has coexisted, as an official shield, with other identity devices.

Verbal sign

The verbal sign is the oral designation of the trademark, and according to Slade-Brooking (2016, p.52) is one of the most important elements of a brand identity, as it has to define a unique offer, communicate effectively with a specific audience, capture a set of specific values as well as looking and sounding good. As Costa (2004, p.19) highlights, it is very important for the institution to appear to be in a conversation, since trademarks should circulate with people and among them, which could not happen without a name - that which cannot be named does not exist. This designation, Costa adds, is the heritage of everyone: the student, the teacher, the journalist, the politician, the institution and even the competition. On the other hand, the verbal sign as a visual message is the exclusive patrimony of the institution and will define the way in which people call it. For that reason, Olins (2008, p.87), owing to the fact that the verbal sign is acquired knowledge and integrated into the vocabulary of the audience, advises against changes of name unless it is the origin of the problem the new programme is addressing. In the case of the redesign of the verbal sign of the Universitat de Barcelona, I will work on a problem associated with the name, but that differs markedly from what a change of name represents. The problem to resolve originates from a habit acquired by the audience, who call the institution by its acronym, which has been caused by the emphasis placed on the acronyms of the trademark’s visual sign. This problem will not be solved for the people who know the institution and who will continue to use the acronym to name it. However, I will focus on guaranteeing that
the new public and the international presence of the institution become unequivocally associated with the name "Universitat de Barcelona".

As mentioned before, the design brief prescribes maintaining the corporate typography, ITC Charter. This mandate added to the previous consideration lead the design process of the verbal sign to the composition of the name "Universitat de Barcelona" with the ITC Charter typeface. Nevertheless, I must consider whether this conclusion can affect, as Raposo (2012, p.488-489) indicates, the transmission of the semantic content of the corporate visual identity as a whole. As the author points out, the typography has its own semantic value and its relationship with the other elements of the system contributes strongly to the communicative effectiveness of the whole. Hence, selecting it implies identifying previously the semantic content to be transmitted and the relationship that this establishes with the positioning of the visual identity. The author says that, generally, Sans serif typefaces are more aseptic, contemporary, rational and artificial, while those with serif connote classicism, humanism and emotion.

Universitat de Barcelona new visual identity devices. Logotype design. Source: Own creation.

![Design process steps](image)

**New logotype proposal**

**Old/new comparison**

As we can see in figure 3.40., the redesign process of the new logo for the Universitat de Barcelona is based on maintaining the prominence of the acronym, albeit integrated into the name. A certain importance is preserved for the word Universitat by writing it in small caps, possessing a height lower than that of the capital letter, and the presence of "de" (a preposition) is minimised as it represents the least relevant element of the
group. On the bottom line is the place name "Barcelona" in upper case. The result is that the new composition establishes three reading levels for the three words used, prioritising the visibility of "Barcelona" ahead of "Universitat" and "de".

**Visual sign**

Slade-Brooking (2016, p.49) warns that visual signs can have specific meanings, and often develop a strong symbolic significance over time. So it is extremely important to have a full appreciation of any historical or traditional meaning, so that visual signs are used in a sensible, appropriate way. One of the questions raised by the redesign of the shield is whether it should be considered as a device that belongs to heraldry or not. In the design sector in Barcelona, there is a well-known case where the redesign of the city council shield reached the mass media on account of the political and legal circumstances that surrounded it. It also had repercussions for the design sector and designers. The municipal plenary session of May 1996, after a great deal of controversy, approved a new shield, in which design criteria prevails above heraldry: the city council opts for a kind of city logotype, rather than a shield, a symbol that shortly afterwards begins to occupy the place of the old emblem in municipal buildings and on official documents, with all the commotion and disruption that this entails.

![Figure 3.43. Ajuntament de Barcelona identity devices evolution](image)

The events took place when approval of the new shield was refuted by the Catalanon Heraldry Society and the nationalist parties claiming that the proposal did not adapt to the norms of heraldry. The design synthesised the St. George cross (Sant Jordi in Catalonia) and the four stripes (of the Catalan flag) in a non-orthodox way, causing the dispute to end up in the courts. After 10 years, a ruling was made in favour of the party that had lodged the appeal; a resolution that caused the city council to replace the initially approved version for a new one, which followed the precepts of heraldry. Aware of this event, before proceeding with the
redesign of the shield, although I know its origin and the elements that it comprises, I asked Dr. Leticia Darna, member of the Catalanian Society of Genealogy, Heraldry, Sigilography, Vexillology and Nobility, about what previous considerations I had to take into account, from a heraldic perspective, before redesigning the shield. Her comments are transcribed below:

“The symbol of the University, being from the nineteenth century, its elements besides being overladen and unclear, are already too ‘logotyped’. The figure that represents the sun of science or knowledge is somewhat fanciful (typical of the time) and could be replaced.

If what you want is to respect heraldry, representing something alluding to Barcelona is recommended (do we not know if the other universities, such as Girona, Lleida, Tarragona, still depend on this university?).

Perhaps I would respect the motto, and would place it at the foot of the shield in a band. The figure that appears at the head of the shield, which alludes to science, I would replace with an open book. The colours could be azure for the head of the shield and the book gold in colour. Below, the traditional Barcelona shield”. It can be interpreted in the transcript, that the author recommends changing one of the representative elements of the university, the face of Apollo that represents knowledge, and replacing it with a book. In the event that I wanted to take more freedoms, outside the rules of heraldry, the author affirmed that I could not call it a shield, but rather a symbol or a non-heraldic shield. Given the significance of the decision, the consideration was put to the institutions of the university that acted as interlocutors. By common agreement, it was decided, given the unwillingness to link the institution to the nobility, to maintain the liberal and autonomous spirit of the institution represented by the light at the head of the shield. It was also recognised that its alignment did not belong to a shield but to a non-heraldic shield or symbol. This released a series of formal decisions, which an alignment to heraldry would have prevented, and thus helped to achieve the objective requested in the design brief.
In designing the visual sign, and to achieve the goals set out in the design brief, the non-heraldic shield that the University has used discontinuously since 1857, and with varying attributes, is redesigned. The first creative decision is to eliminate the shields of the demarcations that belong to the old university district, maintaining only the one that represents Barcelona. The profile of the current shield is from a French model, and is replaced by a more rounded, pleasant form. The interior of the shield is divided into two well-differentiated parts: the head and the shield of Barcelona. The head of the shield represents the figure of Apollo, god of medicine, beauty, music and poetry for the Greeks, and then in Roman mythology he replaced Helios, god of the sun. As the face is a figure that conceals a hidden meaning, it was chosen to represent the same concept but in a more diaphanous way, a concept from the university’s motto, light, portrayed in the redesign as a sun that projects rays. The motto, that shared the location with Apollo, presented many visibility problems, not only because it was printed in gold on a blue background, but also because its size in relation to the shield meant, in most cases, it was very difficult to read. Consequently, it was decided to extract it, placing it around the shield and distributing the phrase "Libertas perfunded omnia luce", which means "freedom will love (it will flood) everything with light", at the top and bottom. In this way, the disproportion of size between the shield and the motto is reduced, and as it is printed on a white background, legibility is greatly improved. At the
bottom, the official shield of Barcelona is maintained. Quartered, it contains the union of the signs for the Sant Jordi cross, patron saint of the *Casal de Barcelona* (which coincides with the heraldic arms of the cathedral and diocese of Barcelona, under the invocation of the *Santa Creu*), and the signs for the *Casal de Barcelona*, or royal arms, which are the *Comptes de Barcelona*, four poles (commonly called bars) of *gules* (a red colour) on a gold background (yellow).

The unit

A specific relationship is established in size and position between the verbal and visual sign, aligned horizontally with certain proportions they are configured as the standard communication unit.

![Universitat de Barcelona new visual identity devices. Emblem and logotype standard composition](image)

**Figure 3.45. Universitat de Barcelona new visual identity devices. Emblem and logotype standard composition**

![Universitat de Barcelona new visual identity devices. Standard composition in solid colour](image)

**Figure 3.46. Universitat de Barcelona new visual identity devices. Standard composition in solid colour**

In order for the new device to be adaptable to print media that require the use of only one ink, a solid colour version is made that maintains the meaning of the composition.

In figure 3.43 we can see how the new basic elements of identity are configured. It shows the new device applied on a white background, as well as a corporate one, and how existing complementary elements, such as the blue colour and the corporate typography, are integrated. There is also a version of economic application, which requires a single colour to be reproduced. In figure 3.44. we can see how the unit is configured and
that it also maintains the existing blue colour and corporate typography.

Universitat de Barcelona new visual identity devices. The identity basic elements in full colour. Source: Own creation.

```
<table>
<thead>
<tr>
<th>Font</th>
<th>Style</th>
<th>Characters</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Regular</td>
<td>abcABC</td>
</tr>
<tr>
<td></td>
<td>Bold</td>
<td>abcABC</td>
</tr>
</tbody>
</table>
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Figure 3.47. Universitat de Barcelona new visual identity devices. The identity basic elements in full colour

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<th>Style</th>
<th>Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Regular</td>
<td>abcABC</td>
</tr>
<tr>
<td></td>
<td>Bold</td>
<td>abcABC</td>
</tr>
</tbody>
</table>

```

Figure 3.48. Universitat de Barcelona new visual identity devices. The identity basic elements in solid colour

Variants

Two more variants are available to facilitate adaptability of the device. They are configured with different proportions in order to be more
visible in small formats, and in a vertical configuration to facilitate a centred alignment of the information on certain communication supports.

<table>
<thead>
<tr>
<th>Standard version</th>
<th>Small sizes version</th>
<th>Vertical version</th>
</tr>
</thead>
</table>

![Universitat de Barcelona new visual identity devices. Versions. Source: Own creation.](image1)

These two versions close the catalogue of versions for the device that can be used for the general communication of the University.

**Standardised variant for exclusive use of the Rector**

One of the requirements of the design brief is to establish the same verbal and visual sign for the device that the University uses in its generic communication together with a more institutional device for the exclusive use of the Rector and the ceremonies he presides.

![Universitat de Barcelona new visual identity devices. Dean exclusive use version. Source: Own creation.](image2)

**Validation process**

In order to validate the design proposal, I will address the 4 methodological principles and their frameworks of relevance with the creative result we have obtained following the mandates of the design brief. This validation will be carried out according to the four methodological processes. In the first stage, I will establish the direct relationship between the design brief and the creative process, obtaining
Validation of the design’s relevance according to the meaning that was originally sought. In the second stage, I will validate the proposal according to its functional requirements and to conclude, the university administrators will validate it legally, registering the trademark in the Spanish Office of Trademarks and Patents.

**Figure 3.51. 4 Validation steps through 4 Principles for designing appropriate Trademarks. Own creation.**

**Validation in accordance with the Design Brief and the creative process. Pertinence of the design in terms of meaning.**

**A.** Given the international projection of the Barcelona brand, the new graphic proposal should have the name Barcelona as the most visible element of the composition between the symbol and the logotype.

**Figure 3.52. Universitat de Barcelona Trademark validation conclusions. “Barcelona” toponym visibility**
As shown in figure 3.52., I have made a comparative analysis, the same analysis used in the characterisation of identity elements, regarding the area "Barcelona" occupies within the unit. The same calculation of proportions reveals the new proposal, compared to the previous one, needs 43.3% less space to reproduce, and it allocates 40% of the printed area to express the place name "Barcelona" compared to 12% previously. I conclude that the new proposal is not only more visible while occupying less space, but it optimizes the visibility of "Barcelona" with 28% of the occupied space.

B. The proposal should also simplify, from a semiotic point of view, the relationship between a single symbolic element and a single descriptive element.

As shown in figure 3.53. the new proposal is composed of a single verbal sign and a single visual sign, thus establishing a direct relationship between a name and an element that represents it. In terms of semiotics, I establish the relationship between the organisation and its meaning with an unequivocal display of the sign that represents it.

C. Maintaining the hierarchy of communication elements generated by the rector’s office, they should have a visual relationship with the communication generated by the other bodies within the Universitat de Barcelona.

Figure 3.54. shows how in the new proposal a different hierarchic perception has been configured between the device used by the Rector and the generic device used by the university, using the same verbal and visual sign. This effect is achieved by changing the proportions of the relationship between the descriptor "University of" and the place name "Barcelona" as well as horizontally centring the device’s components.
The project should intercede minimally in the good management that the Corporate Image and Marketing Unit at the university has carried out. Consequently, it should be respectful of the existing complementary identity elements: such as the corporate typography, corporate colours and the composition criteria for communication systems. Here are some examples of integration.

D. The project should intercede minimally in the good management that the Corporate Image and Marketing Unit at the university has carried out. Consequently, it should be respectful of the existing complementary identity elements: such as the corporate typography, corporate colours and the composition criteria for communication systems. Here are some examples of integration.
Figure 3.56. Universitat de Barcelona Trademark validation conclusions. Non interference on visual language. Example on letterhead application.

Example on business card application.

Figure 3.57. Universitat de Barcelona Trademark validation conclusions. Non interference on visual language. Example on business card application.

Example on envelope application.

Figure 3.58. Universitat de Barcelona Trademark validation conclusions. Non interference on visual language. Example on envelope application.
As seen in the applications exemplified in figures 3.55-3.59., the integration of the new device can be carried out by simply replacing the previous one, occupying the same space and aligned with the grid of the existing graphic components. Another observation is that, while many of the administrative forms were previously reproduced in two inks, the new model supposes an optimisation as it can be reproduced with printers of single ink. This validation is not only important in the context of following the design brief, but, as Chermayeff & Geismar (2000, p.7) assert, showing how the device will appear in context is useful when presenting a design, since the brand, isolated on a white board, can be very deceptive.

Example on signage Monolith

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Before" /></td>
<td><img src="image2" alt="After" /></td>
</tr>
</tbody>
</table>

Figure 3.59. Universitat de Barcelona Trademark validation conclusions. Non interference on visual language. Example on signage monolith application

In the case of monoliths for building identification, the marked presence of the acronym at the top of the sign necessitates a re-think of the composition, in order to free the bottom area of information. This is because this part is often hidden by people passing by, vehicles in circulation or even parked, and sometimes by vegetation in the garden area where the signage is located.

**E. The new elements of visual identity must convey the idea of a university projected towards the future but, at the same time, forms part of the group of the oldest universities in Europe and occupies one of the first positions in the bibliometric valuation rankings.**

As I have identified in the analysis of the sector, I have obtained some significant percentages regarding certain formal characteristics of
the identity devices from the 200 universities that form what we consider the field of competition. The values obtained are not absolute, nor do they aim to validate the proposal itself, but rather the purpose of the proposal is to integrate the device into a visual expression considered archetypal and therefore relevant. As figure 3.60 shows, the new proposal integrates a visual sign that refers to the history of the institution, as well as establishing an unequivocal relationship between the verbal sign and the visual sign.

Validation in accordance with functionality. Functional pertinence.

The third process of validation responds to the precepts of the different methodologies analysed in chapter 2, which are summarised in a series of needs the device will require as it is systematised in the varying communication supports.
Both the shield (visual sign) and the logotype (verbal sign) have been built on a grid to ensure the relationship between the forms that make up each unit have a certain proportionality. Having established the proportions of these two elements, they will be considered indivisible units when determining the proportions in the variants of composition between the verbal and visual sign. The following figure 3.62. specifies the three relationships of proportion established between the shield and the logotype. The standardisation of the proportion of sizes between the components of the identity device has the function of prescribing this relationship as unalterable, thus ensuring permanent consistency in its application. In addition, it guarantees that the contrasts established between the printed ink and the empty space offer optimal reproduction in reduced sizes. Definitively, it guarantees consistency of application over time, space and with regard to visibility.
It also delimits, figure 3.63., the clear space: the area where no external element can interfere with the necessary visual hierarchy the device requires to guarantee its correct visibility.

Exclusion zone. Considering a total exclusion zone as seen below. Source: Own creation.

This space is delimited, in the three variants of the device, by the height of the initials “UB”, which maintain the same position as their composition within the logotype.

In order to integrate the new palette of colours needed to reproduce the shield, to the blue already used by the university, the cross references for their different codes according to the main printing systems to be used have been detailed. The printing systems include: the offset printing system, either with four-colour printing or spot colour, is a coding that guarantees the reproduction of the colour in a standardised way for any printing system that uses subtractive synthesis. Also, the colour coding is standardised for reproduction using additive synthesis, which is mostly on-screen media, and is normalised with RGB or hexadecimal codes, known as web safe colours, which guarantee 216 stable colours on any type of screen. Finally, the RAL coding system (Reichsausschuß für
Lieferbedingungen und Gütesicherung) is also normalised. This is a European colour combination system that defines the same chromaticity for paint, plastic and coatings. It should be noted that it is used extensively in the coding of colour references for many industrial processes. Colour normalisation will also ensure a coherence framework, so that the device is always displayed in the same way.

Corporate Colours. These colours should be used in preference where the logo is reproduced. Source: Own creation.

<table>
<thead>
<tr>
<th>Colour</th>
<th>Pantone® inks</th>
<th>Process</th>
<th>RGB</th>
<th>RAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>Pantone 285 C</td>
<td>C: 91</td>
<td>R: 0</td>
<td>G: 134</td>
</tr>
<tr>
<td>Gold</td>
<td>Pantone 877 C</td>
<td>C: 7</td>
<td>R: 204</td>
<td>G: 172</td>
</tr>
<tr>
<td>Burgundy</td>
<td>Pantone 193 C</td>
<td>C: 2</td>
<td>R: 187</td>
<td>G: 19</td>
</tr>
<tr>
<td>Black</td>
<td>Pantone Process Black</td>
<td>C: 0</td>
<td>R: 0</td>
<td>G: 0</td>
</tr>
</tbody>
</table>

Another of the graphic elements that must guarantee consistency is the type of font used in communication media, and as previously mentioned, the ITC Charter typeface had already been assigned to this function. With the advent of online communication, administration and promotion, computer development systems condition the visibility of typefaces. That is why it is necessary to normalise a complementary font that will be present in a wide range of computer systems. Indeed, authors of web content use these fonts to increase the likelihood that the content will be displayed in its chosen form. Consequently, the typeface Arial is normalised.
The various environments and systems that will have to reproduce the symbols is extremely broad, as well as the different situations that will be encountered. Figure 3.65 specifies the adaptations of the device, and its versatility, according to the colour coding to guarantee optimal perception for the different types of backgrounds it will be necessary to perform on.

Figure 3.65 Design technical specifications. Corporate fonts

Logo colour usage. Technical reproduction criteria. Source: Own creation.

Process on white background
- Red
- C/M/Y/K

 Universitat de Barcelona

Process on blue background
- Red
- C/M/Y/K

 Universitat de Barcelona

4 solid ink on white background
- 285C/873C/193C/Black

 Black on blue background
- Black

 Universitat de Barcelona

3 solid ink on white background
- 285C/873C/193C

 White on blue background
- 285C

 Universitat de Barcelona

White on black background
- Black

 Universitat de Barcelona

The preferred colour usage for the trademark is the process colour version. Where the quality of the reproduction of the process or 4 inks is uncertain, one of the single colour version should be used (Process 285).

The trademark can also be printed as a solid blue/black or reversed out in white.

Figure 3.66. Design technical specifications. Technical reproduction criteria

In order to verify if the proposal responds to one of the functional precepts of reducibility, the minimum size has been calculated in which the device can be reproduced before losing visibility and as a result meaning. This is carried out with the three standardised variants, and two printing systems, for the colour and one-ink versions. As figure 3.67 shows, the one-ink version obviously obtains a much greater reducibility than in colour, which should orient the designer when the device is to be reproduced in highly reduced spaces.
Figure 3.67. Design technical specifications. Minimum size
Sub trademarks. Design considerations to create sub trademarks. Source: Own creation.

As mentioned on the webpage of the **Universitat de Barcelona**, it encompasses more than 500,000 m², spread over several university campuses in an urban environment, with a network of centres formed by sixteen faculties, eight university institutes, various associated centres, and a myriad of administrative departments and divisions.
Any project that covers such a volume of staff, as an administrative and organisational structure, requires the construction of visual identity architecture that enables identifying a complex structure of units organised by an administrative hierarchy. The proposal establishes criteria for the construction of devices to identify these units. Maintaining the presence of the device that identifies the university, the relevant denominations are structured with composition criteria of first hierarchy that contains the name of the faculty or division, and a second that may contain the name of a department, unit or service.

Validation in legal terms. Legal pertinence.

During the presentation of the case, I have called the subject of the redesign a device of visual identity. This device will only become a trademark at the time its registration is accepted in a public body that certifies it as such. Registering a visual identity device, according to Hart and Murphy (1998, p.72), affords protection through three functions:

- Distinguishing products or services of one organisation from the others.
- Indicating the origin from which the goods or service originate.
- Serving as an indication of the consistency of quality (good or bad).

The applicable law on trademarks, according to Lutzker (2003, p.107), aims to protect two interests: those of the investor, who allocates resources to create words or symbols that identify the business as the origin of its products or services, and those of the consumer, who trusts a brand as a symbol of quality that can be associated with a known origin. Unlike copyright law, which only protects against copying, trademark law grants a monopoly to use a word or symbol in commerce. In other words, the legislation states that, even if a second user unknowingly supplants the trademark in one of the protected areas, the user may be forced to stop the impersonation and could be penalised.

As indicated by the Spanish Patent and Trademark Office, in order for a visual identity device to be registered, it is necessary that the sign to be registered is lawful. That is to say that it does not fall into any of the prohibitions established by law, and that it is available or, in other words, does not enter into conflict with previous rights, either as a trademark or other proprietary right, such as the right to a name or intellectual property.
As shown in figure 3.69., in March 2016, registration was approved for the two main variants of the device, the one for the general scope of the university and the other for the exclusive use of the Rector. It is worth noting that the approval was validated in 37 categories of the Nice classification, not only those regarding the 41 that refer to educational centres, but to many others, which is understood as a protectionist strategy in the promotional area of the University. The communication department has detected many forgeries of its merchandising elements, especially clothes and accessories, in tourist shops in Barcelona. This matter has especially worried the management team, not only due to the economic losses through impersonation, but also in terms of harming its prestige.
Implementation process

Once the proposal has been validated in terms of relevance, the client has approved the new design and it has been presented publicly, it is time to schedule its implementation and integrate it into the University’s communication system. This process, according to Olins (1978, p.166), takes place gradually, on a replacement basis. It usually takes about three years, in a medium-sized company, for the changes to be perceived by the public, while for large companies it can last longer. The author warns that the speed at which the programme will be implemented depends on how dramatic the change is, and how impatient the organisation is, as well as how much money it is willing to invest.

In the case presented here, while the change of logotype is a strategic necessity, there is also consensus in the management team that the economic situation of the university does not allow for immediate implementation. Consequently, two additional tasks were added to the project: developing a new Corporate Visual Identity Manual for the previous structure and drafting a protocol to establish the criteria for the implementation of the new logotype.

The Corporate Image Manual of the Universitat de Barcelona will be the reference tool that establishes the guidelines for implanting the new identity. The manual is created with the aim of evolving together with the
new identification needs that emerge, which is essential for an entity of magnitude, such as the Universitat de Barcelona, with different dynamics, a substantial organisational structure and an extensive spread of spaces and buildings.

The General Implementation Protocol aims to control the expense of integration for the new device and centralise the criteria for prioritising the change according to the type of application and its economic repercussion. These precepts are structured in four points:

1. The manual becomes a reference guide that governs the application of the logotype. Nevertheless, under no circumstances is it an explicit instruction regarding the change, as the implantation strategy is determined by the Department of Communication of the University.

2. Three categories of implementation are established:
   CATEGORY A - Implementation in applications for a digital environment
   Virtual environments
   Templates for administrative, management and communication documents
   CATEGORY B - Implementation in fungible applications
   Stationery
   Publications
   Merchandise
   Clothing
   CATEGORY C - Implementation in applications for installations
   Signage
   Display signs

3. Protocol of action according to the implementation category.
   CATEGORY A - Request approval from the Department of Communication and Marketing
   CATEGORY B – Use up remaining stock of consumable items with the old logotype, and once exhausted, request approval from the Department of Communication and Marketing
CATEGORY C - The implementation strategy of this category is reserved for the Department of Communication and Marketing with approval from the Governing Council of the University.

4. We should remember to use the University’s own resources, whenever possible, to carry out the implementation (reprography centres, IT departments, etc.)

Conclusions

As it can be deduced in the development of the project outlined above, the proposal for establishing 4 methodological parameters for designing basic visual identity devices for organisations, products and services, and trademarks, has been shown to be effective in assessing the relevance of the Universitat de Barcelona’s proposed redesign of its basic identity elements. The four phases established (Figure 3.1.) respond to the four parameters that affect creative methodology and their validation of relevance. These processes can be divided into two methodological approaches that differ from one another: the first two phases correspond to creation parameters and the second two correspond to viability parameters. The creation parameters connect a reflexive position via an in-depth knowledge of the proposed problem, with a creative approach that must attempt to resolve it with a formalisation expressed in signs. This connection is produced by means of complex relationships that require an elaborate theoretical approach to a transformation of a new expressive reality that must respond to the conventions of the visual culture of the sector to which it belongs, and to the audience that interprets them. In contrast, the validation parameters, as I have often seen previously addressed by the majority of authors consulted, deal with objectively verifiable questions, as they respond to observable realities and can be physically parameterised.

It is able to observe in the study case, that by means of an in-depth analysis of the identity devices of the sector where a university offer is located, these are characterised as following patterns of visual expressions that depend on their characteristics, and that become key to resolve the formal proposal. I have identified this part, within the methodological process, as the meaningful appropriateness, which is conditioned by the
relationships established between the formalisation of a proposal and its reason for being according to the interpretive conventions that the public that interact therewith understand in the way predicted. The ways they were predicted are represented by the strategic objectives of the institution. The strategy is aimed at fitting with a specific position, which is thought to be the potential of the interlocutor, whether the internal or external audience, to understand according to its purchasing preferences or affiliation to a specific group; here we must not forget that we can also consider the external audience to be public opinion. In order for this strategy to fit these goals, the conventions that surround the visual culture must be considered in the context in which the type of activity is located. In this case, as I have said, I have observed that a particular sector has a culture built up around it, created over the years. The characterisation of the visual features of the identity devices of the set of offers has shown symptomatic visual expressions, in relation to the models of coexistence between verbal signs and visual signs, and that this relationship is connected with different aspects that characterise the sector and the peculiarities of each offeror; as I have observed, the story of an institution, its geographical location, and its specialisation can be expressed in the type of device it uses.

At this point, with a view to moving on to the second question the research question aims to address, I must consider whether the example set forth above can be extrapolated to other cases in sectors other than that of the university. In the research question, I have mentioned the perception of trademarks behaving mimetically in different service and product sectors, and that this mimicry is perceived in the relationship established between the verbal and visual sign. In the above case, I have verified that most relationships are composed of shields and stamps. However, in other sectors, the use of logotypes, combinations of logotypes and symbols, or logotypes integrated into symbols, monograms, or letterings can be of conventional use. For that reason, it is necessary to determine what types of combinations can emerge, elaborating a well-founded classification proposal that delimits them.
4. Trademarks Classification Proposal

The case study detailed in the last chapter verifies how an appraisal of the type of relationship established between the verbal and visual sign was not only possible to integrate into the decision-making process of trademark design, but became a transcendent factor in obtaining an appropriate result for the positioning of the Universitat de Barcelona. In order to be able to normalise this appraisal as an integral part of the four methodological principles proposed in Figure 3.39, the number of relationships that can occur between the two types of sign must be stabilised. While in the case of the university sector 7 possible combinations were detected, of which two were the most common, I have to understand that other sectors can produce a variety of different cases. Defining and demonstrating the limits of this combination is essential for different reasons. The first is that it enables the validation of a fundamental position of the thesis; that which defends a typological essence in the formal genesis of trademarks. Also, in stabilising these typologies, in addition to providing the possible suitability of a particular relationship in the creative process, it should also allow the designer to organise that process in a more methodical, objective manner; being able to separate the formal ingredients in those perceived as a gesture, a form, a figure, and those that need to be interpreted by reading. Another factor that makes the classification paramount, and that has been considered as one of the motivations of the thesis, is that it helps to solve the terminological problem perceived in the domain of trademark design. If the classification is compatible with the semantic field expressed in the first chapter (figure 1.1), it can facilitate communication and rigour among professionals, students and researchers.

In order to define a model that most closely fits the functionality to be fulfilled, I will review different prior conceptual frameworks of classifications, in order to evaluate these contributions.
Prior conceptual frameworks in different classification essays

Signs in graphic communication by Krampen

Krampen (1965) was a designer and psychologist who worked in the field of semiotics and environmental perception. He studied at Ulm and can be considered as a member of the school of thought that started doing research on visual communication that is seen as an attempt to inform or persuade, aimed primarily at the eye of the receiver. He raised the idea of the interface, an international intuitive language to interact with machines, traffic, computers..., and to persuade, as advertising communication took up the rules of simplification and functionality that European art and design schools set up, after visual oversaturation set by previous overly ornamental trends. In 1965, he published an article in Design Quarterly where he considered the sociological potential of graphic design. He felt that the theoretical study of visual communication was not very advanced and that graphic communication was not yet a cohesive field of study. Even then graphic communication techniques and methods were largely empirical; no available textbooks indicated principles or methods of approaching difficult problems. While experiments had been made on the relative legibility of typefaces and the viewer’s comprehension of graphs and tables, academics did not know anything about the effectiveness of a layout. No terminology existed at the time to describe and relate all the elements and factors in graphic communication. However, the author considers that it would be useful to establish a workable terminology, and that it would clarify the uses and advantages of pictorial signs and symbols for the designer.

![Graphic Signs](image)

Krampen considers three signs: the letter “e,” the silhouette of a man, and a dollar sign. He argues that they are obviously different and we must be able to label them differently in order to distinguish them. When
“e” or any other letter is written, it produces a particular kind of graphic sign called a “phonogram” which takes the dimension of speech-sound. On the other hand, the silhouette of the man and the dollar sign are not functional as speech sounds; they form a class of their own, called “logograms.” Since logograms are independent of speech sounds, they have the important property of communicating across language barriers. There are, however, obvious differences between the silhouette of the man and the dollar sign. The silhouette of the man refers to a real object by resemblance and is called a “pictograph” while the dollar sign, also independent of speech-sound, but not iconic, belongs in the class of diagrams. This classification is not focused from a marketing point of view, but is basic for our study because it represents the semiotic nature of the brands, the essence of what logotypes are composed of: a text-based dimension and an image-based dimension. From this point forward, the authors I will analyse will involve the blend of those dimensions in different ways.

Weckerle’s classification of signets by sub-elements

The first symbols classification was proposed in 1968 by Weckerle, lecturer at the Werkkunstschule in Hanover. Weckerle’s proposal was published for the first time in the Design Journal (240). The journal’s editor Hughes-Stanton (1968, p. 240) wrote, “Since the mid-50’s, there has been a gradual, but often entirely arbitrary move toward the use of abstract symbols for company recognition. These have almost always replaced figurative illustrations, which, for all their limited value as information, had a humanitarian realism. Many of the new symbols have lost true symbolism in having nothing precise to say. Hans Weckerle’s classification has discovered a wide range of symbol sub-elements. By defining the nature of individual symbols in a very precise way he makes possible a more functional approach to both the design and use of company symbols, for different kinds of organisation and different purposes. Until now, there has been no attempt to make an exact classification in this field”. This argument is a key point because for the first time an author measured the magnitude of trademark complexity and tried to classify them according to visual form, origin, and achieved function. One of the interesting points is how trademarks, with a cross-classification of concepts, allow each category to share other features. This main concept is divided into 4 principal groups and 9 sub-sections.
This classification also demonstrated that the same institution can have different brand expressions, thus belonging to different categories.

In the book *Signet, Signal, Symbol* by Diethelm (1968) the proposal was published again. As the author points out, there was a growing concern over the process of trademark design, and he argues that a matrix can be made on the basis of this classification, which could be of great practical value. With the help of this reference system, the given starting position, the demarcation concerning existing signs, as well as patentability, can easily be determined. With the help of such a matrix, it would be possible to test signs of all types for efficacy and patentability.


![Figure 4.2. Symbols Classification by Hans Weckerle](image)
the proposal to be unambiguous and can lead one to question the selection criteria examples.

One of the main underlying problems that this classification has was discussed by Slees (1969) in a letter published in the same journal, with very interesting arguments analysing the low functionality of the classification and calling for a model that would explore the relationship between semantic and visual properties:

“While it is impressive to present a detailed and precise description of symbols, it does not follow from this that it “makes possible a more functional approach to both design and use of company symbols.” It is necessary to look towards function first and devise a classification system therefrom.

The magazine reader asserts that the function of a symbol is not to be a logotype, abbreviation, or any other of the categories listed. The function of the symbol is to communicate effectively. It is thus a semantic problem and any classification must consider the relationship between semantic and visual properties. The semantic properties of a symbol can be investigated using behavioural research techniques and the research should try and answer the question “which visual characteristics convey what meaning and, given a particular context, what is the most effective way to do so.”

The approach adopted by Mr Weckerle relies entirely upon the visual classification of symbols, not related to their function.

Werkman’s schedule for the analysis for direct product information.

Werkman presents an analysis in his book Trademarks (1974) based on the use and construction of “modern brands” in order to help companies and designers create them. According to the author, trademarks act mainly in two ways, since they are interpreted from the perspective of the organisation and from the perspective of the consumer or user. The former uses them to attract the attention of the consumer, so they must be named, designed, and registered, and are represented by any type of device: images, graphics, letters, numbers, or a combination of these. For the latter, consumers, a trademark is nothing more than a relationship between words and graphics that allow them to recognise and refer to the products they wish to buy. To analyse these two functions, the author makes use of the term “product information”. Product information can be direct if the brand refers directly to all or part of the article for which it is created. Or it can be indirect if the intrinsic meaning of the
brand can stimulate the consumer to transfer the favourable aspects of this meaning to the article to which the brand applies. To do this, the consumer must be familiar with the intrinsic meaning of the brand. The author also recognises that there are commercial brands that do not provide any information about the product, among which there are a large number of arbitrary expressions.

Given that the author believes that the essence of trademarks is mainly words, existing words and others that are elaborated, and sometimes used as if they were names and sometimes invented. He creates a classification based on this consideration by analysing the many variations that can be found. The classification proposed considers the interpretation from the perspective of the consumer/user's perception; however, I consider that over time, the formalization of identity devices has evolved a lot, and this model is a far cry from how brands are conceived at present, in the sense that the author considers the trademark as a device that has the function of transmitting information in a unidirectional way, and not as a device that has to be able to contain the meaning of the brand, as this is given by the organisation itself and by the consumer/user.
Trademark classification by the Selames

The Selames were internationally recognised experts, authors, speakers, and consultants on identity, brand asset management and visual communication. One of three books published during their career, Developing a Corporate Identity: How to Stand Out in the Crowd, suggests a classification of trademarks (figure 4.4.). It is important to set


<table>
<thead>
<tr>
<th>The Seal:</th>
<th>A name or group of words rendered in a cohesive form.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Monoseal:</td>
<td>A monogram or initial within a shape or seal-like form.</td>
</tr>
<tr>
<td>The Monogram:</td>
<td>A letter or combination of letters rendered in a distinctive manner devoid of confinement.</td>
</tr>
<tr>
<td>The Signature:</td>
<td>A company name rendered in a particular and consistent manner.</td>
</tr>
<tr>
<td>The Abstract:</td>
<td>A graphic device, geometric or otherwise, that represents a company or service.</td>
</tr>
<tr>
<td>The Glyph:</td>
<td>A mark that pictorializes a company's service or area of competence.</td>
</tr>
<tr>
<td>The Alphaglyph:</td>
<td>A mark formed around a letter or letters that pictorializes a company's service or area of competence.</td>
</tr>
<tr>
<td>The Combination symbol:</td>
<td>Comprised of a mark and signature. This can stand as the company's symbol, or it can be devised so that at times either the mark of the signature is used alone.</td>
</tr>
</tbody>
</table>

Figure 4.4. Elionor & Joseph Selame Trademarks Classification

this classification in the context of North America – while European design has evolved highly influenced by art movements, American design was more influenced by economic incentive, which preserved a wide variety of trademark representations due to the fact that no rules were established as long as profits were enough. A long period without conflicts inside the national territory, together with free market policies and advertising exerted a crucial synergic engine, which meant North America was more evolved in trademark device design.
It should be noted in the presentation of this classification that the authors preceded it by stressing the importance of choosing a symbol and what factors should be taken into account when designing it. Influencing the final decision are the company’s areas of visual exposure, the market segment to be reached, and the budget set aside for reproducing the symbol.

This case is relevant due to the fact that it considers a range from historical formalisations to more contemporary ones, and tries to indicate the characteristics and virtues of each one. Although it does not specify exactly the suitability of its use according to the characteristics of the institution “there are advantages and disadvantages to using each of the five forms. The personal opinions of the people choosing the symbol and planning the programme have the heaviest bearing on which is chosen and why.” The problem of this classification lies in their recommendation that appropriateness depends on client and designer tastes. “In general, the combination symbol is most useful for unlimited applications. However, both businessmen and designers have strong opinions about which symbol they prefer. Some do not like the combination because it still involves reading words, rather than just looking at a simple picture.” “No matter which is chosen or why, well-conceived and well-designed symbols all have something in common. They manage to be distinctive but economical. They convey the name and/or the purpose of the company or an image that the company wants to project with the fewest possible graphic lines”.

The classification by itself has some shortcomings due to not including logotypes without symbolic expression, specifically calligraphic and typographic elements; it is also relevant that it does not consider the formalisations prior to the first half of the twentieth century, like shields. One of the main problems is that the authors fall into the error of using brands designed by themselves, which limits their attempts at doing empirical research, and the authors reduce their knowledge transmission to “what” was done and “how”.

Frutiger’s classification of non-alphabetical signs and those in industry.

Frutiger is recognised as one of the great typographers of the twentieth century, and a leading figure in the study and analysis of symbols throughout history, as well as the relationship of form and meaning within psychological and cultural parameters. He makes a journey through the historical evolution of symbols that concludes with a classification of the signs of industry and commerce. Made from the point
of view of their motivational origin, it should be noted that this classification was made in the period when the Swiss school influenced graphic design, and with no doubt European graphic designers for 30 years; as he himself typified in 2001, “figurative representation was replaced by stylisation. Drawing was limited to black and white contrast.


<table>
<thead>
<tr>
<th>Signs Category</th>
<th>Type of signs</th>
<th>Signs Category</th>
<th>Type of signs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Falsscience &amp; magic</td>
<td>The elements signs</td>
<td>Marks</td>
<td>The just marks</td>
</tr>
<tr>
<td></td>
<td>Astrological signs</td>
<td></td>
<td>Cattle marks</td>
</tr>
<tr>
<td></td>
<td>Alchemy signs</td>
<td></td>
<td>Trade marks</td>
</tr>
<tr>
<td></td>
<td>Cabalistical, magical and talisman</td>
<td></td>
<td>Artisan and industries</td>
</tr>
<tr>
<td></td>
<td>signs</td>
<td></td>
<td>Water marks</td>
</tr>
<tr>
<td>Signatures</td>
<td>Mason signs</td>
<td>Modern industry marks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monograms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>House marks</td>
<td>Technology and Science</td>
<td>Ideographs</td>
</tr>
<tr>
<td></td>
<td>Japanese family shields</td>
<td></td>
<td>Modern sciences</td>
</tr>
<tr>
<td></td>
<td>Heraldry</td>
<td>Signal signs</td>
<td>Environment orientation</td>
</tr>
<tr>
<td></td>
<td>Present communities</td>
<td></td>
<td>Pictograms</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cartography</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Service (UK)</td>
</tr>
</tbody>
</table>


Brands purely figurative content. The degree of recognisability is unusual. Are at the verge of abstractive, figurative images are discernible. They are typical diagrams schematic configurations.

In prevalent appealing alphabetic forms, using the initials of the company or product to question in order to achieve a phenomnemonic expression from a visual point of view. This category brand signs should be encompassed in monogram section. However, for purely historical and aesthetic reasons has been included in the section of modern signs of identity.

Symbols representing abstract forms, where can present multidimensional aspect to others that stimulate a volume morphology.

Circular form brands used as the circulation of movement including crosses, circles and spirals. Others, to indicate movement, need a circular movement, crossing line as approach the arrow as an unremovabale element. Their signs design is commonly used in configurations to transmit this need.

In the group of abstract forms you find the signs with the use of conceptual traces, fast of forms which mediate employment projects. It provides the observer with an internal image inadmissible volumes.

Figures 4.5 Adrian Frutiger Non-alphabetical signs Classification. Figure 4.6 Adrian Frutiger Signs in Industry Classification

Linear signs use a path of constant thickness. At the beginning of this period, the image is clearly recognisable. Then there is a stage where it tends to abstraction. Pure, abstract graphic effect is gradually becoming dominant. Geometry reigns.”

This case, despite being a classification exclusively of symbols, and which marginalises all typographic expressions, is important to consider because it represents one of the key moments in the process that we are unravelling, so it is a witness to how a trend in design affects international business communication and consequently the outlook of corporate
identities, and how that generates a saturation that the author acknowledges: “If we look objectively at all the graphic images of identity together we must admit that some repetition is seen in the types of signs used; some innovative poverty, lack of originality, and poor conceptual depth. It would seem that, after the war, graphic design schools have resorted perhaps too often to contrast black and white, the visual impact of easy execution by joining opposite forms, or violently confronted by more or less artificial processing”.

This quote is interesting since the author acknowledges two questions that interest me. The first validates the idea that there is a certain degree of repetition in the way trademarks are created. The other expresses the presence of features originating from the influence of graphic designers and a certain focus that seeks stylistic results over the suitability of cultural conventions assimilated by the products or services. Consequently, I can consider this classification biased by a specific context and lacking a timeless nature that would make it relevant today.

Wildbur’s classification of communication, graphic signs and marks.

Wildbur (1982) emphasises that when describing signs, we encounter the difficulty of finding adequate descriptive terms, since most of the words existing in daily use, such as symbol, emblem, and logotype have a very broad meaning and are often used indiscriminately by designers. The author starts with Maldonado’s (1961) glossary of graphic signs.

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**Wildbur’s classification of communication, graphic signs and marks**

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![Diagram of Wildbur's classification](image)

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**Figure 4.7. Peter Wildbur Communication, graphic signs and Marks of identity Classification**
He makes a distinction between signs that represent or support sounds (phonograms) and those that are not phonetic in origin (logograms). Logograms can be divided into two different types: those based on non-pictorial (abstract) sources and those based on pictorial (figurative) references. Among these three major groups the author introduces two additional categories that share some of the characteristics of those at each extreme, and concludes that within these five groups we can place most of the forms of graphic signs; in addition, these groups do not have dividing lines, but distinguishing the differences between them will help both designers and users of trademarks.

Wilbur makes a second classification when considering the content of a trademark design, separated it into three cases that can be classified as descriptive, symbolic, and typographic trademarks; he adds that they can be found individually or in combination.

Wildbur’s proposal, I think, as in the case of Frutiger (1981), is clearly the reflection of a particular trend from the eighties, where the concept of a trademark was mainly related to the visual sign while the verbal sign was relegated to a secondary status. I again find a classification that builds an order based on the theory of visual communication, which does not incorporate those devices outside of current trends. Apart from those that I consider historical models, he does not incorporate any type of lettering or mixed expression using both verbal and visual signs.

Murphy and Rowe’s classification of logotypes

In their book, How to Design Trademarks and Logotypes, a guide to creating effective symbols, Murphy and Rowe (1988) present a logotype classification system to improve the creative design process. They also establish a nomenclature of two separate things: trademarks, the means by which manufacturers distinguish their products or services from those of others, and device marks such as “logotypes”, the form in which this trademark is reproduced in a distinctive graphic form.

As I have analysed in other classifications, the authors propose that the logotype should be typological and stylistically adjusted to the sender. Therefore, they propose specific cases describing its features to fulfil that function:
**Name-only Logotypes**, which derive their uniqueness exclusively from a name used in a particular graphic style, send an unequivocal and direct message to the consumer. They are appropriate only when the name is relatively short and easy to use and when it is adaptable and relatively abstract. Such names demand either a contracted form or a simple graphic device for situations in which the use of the full name would be inappropriate.

**Name/Symbol Logotypes.** These logotypes consist of the name in a characteristic type style but contained within a simple visual symbol – a circle, an oval or a box. The name must be relatively short and adaptable because the abstract symbol will not have sufficient distinctiveness to stand on its own. Whenever the logotype is used, the corporate name necessarily plays a key role in the communication.

**Initial Letter Logotypes.** Used by multi-word name trademarks, such names are based on a description of what they do or on long names. Letter logotypes can be interesting for the designer as a straightforward task, but can have serious pitfalls for the client: it can be difficult and expensive to invest initials with real personality and distinctiveness, it is always difficult to gain exclusive legal rights to a set of initials, initials can be frustrating to the consumer, and it is possible that initials may have to vary from one country to another.

**Pictorial Name Logotypes.** These are logotypes in which the name of the product or organisation is a prominent and important component of the logotype style, but in which the overall logotype style is very distinctive. Even substituting a different name it would still clearly be the logotype of its owner.

**Associative logotypes.** These do not usually contain the product or company name, but they do have a direct association with the name, the product or the area of activity. They are simple and direct visual symbols. They have the advantage that they are easy to understand. Also, a symbol in one language might have no meaning whatsoever in other languages and could be viewed in many markets as an abstract graphic device.

**Allusive Logotypes.** The connection between the name and the logotype is by no means as direct as with associative logotypes, and in fact the allusion may be lost on the majority of the audience. The allusion provides a focus of interest in public relations terms, especially when being launched. In a sense, the allusion contained in the logotype becomes a form of secret, shared by those “in the know” but often lost on outsiders.
**Abstract Logotypes.** Many of the logotypes in use today are purely abstract, or, at least, any allusion or meaning is so remote that they are purely abstract for all practical purposes. With abstract logotypes the designer is given a blank sheet. The reason for their popularity stems partly from the diversified nature of corporations. They do not want to favour or particularise one part or division of the corporation. Abstract logotypes need to be handled with care. Coming up with a design solution that does the job and is appealing but that is differentiated from others is difficult and requires effort and skill.


<table>
<thead>
<tr>
<th>Name-only Logos</th>
<th>Come exclusively from a name using a unique graphic style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name/symbol Logos</td>
<td>Treat the name with a specific style and it is fitted inside a simple visual symbol: circle, oval, square...</td>
</tr>
<tr>
<td>Initial letter Logos</td>
<td>The names are based on the company activity or the conjunction of the owners or partners names. Are useful for long name entities.</td>
</tr>
<tr>
<td>Pictorial name Logos</td>
<td>Those logotypes that name is a prominent and important element in the logotype, but logotype global style is very distinctive</td>
</tr>
<tr>
<td>Associative Logos</td>
<td>Are more free, and normally do not include the name of the product but there is a direct association with them. Are visual simple purs direct an simple to understand and give flexibility. The graphic device identifies the transmitter instantly in a simple and direct way</td>
</tr>
<tr>
<td>Allusive Logos</td>
<td>The conception between the name and the logotype is not so direct like the previous case, and it's true that the allusion can be lost by most the receivers</td>
</tr>
<tr>
<td>Abstract Logos</td>
<td>Allusions to meanings are global and abstract. Therefore do not have a real meaning core and should be carefully managed. Its nature comes from different entities with a global corporate profile. They have an effective and attractive graphic solution and a high grade of differentiation</td>
</tr>
</tbody>
</table>

**Figure 4.8. Murphy & Rowe Logotypes Classification**

In some aspects this classification is confusing due to the fact that it mixes form and meaning categorisations and is useless in some of the categories, as the authors recognise that some categories can be interpreted by the consumer as being the same. Moreover, this classification is centred on how a designer should convince the client with a reasoned solution to his task, but in terms of brand positioning does nothing to indicate relevance in the sector or to the consumer targeted by the trademark.
Chaves’ classification of logotypes and “imagotypes”.

Chaves was a professor of semiotics, communication theory and design at several universities and colleges. He is a very important figure on the theory of corporate identity in the Latin American world, and the author of several books on this topic.

The theories exposed in his book *La imagen corporativa*, establish a classification system that includes three basic identification signs for institutional names, logotypes, and “imagotypes”.

![Logotypes and "imagotipos" classification. Norberto Chaves. La imagen corporativa. 1996.](image)

This classification is a very widespread model in Latin America in education as well as in use by design professionals.

This proposal does not consider models like seals, shields, and logotypes with symbolic features inside the typographic composition. It is not a descriptive system but rather proactive, and does not describe what the brands are like, but rather how they should be. For the category that combines a symbol and a logotype he gives a neologism that he calls “imagotype”, the creation of which is necessary as a description is needed for an object that is newly created and does not appear in a dictionary. In this case, even though the word is starting to be used and included in neologism dictionaries, I think the creation of a new term is not necessary because the object could be defined in other terms, and this thesis will make an effort to prove this. Another problem for using a neologism is that it is difficult to translate, and this limits its ability to become an international term.
Haig and Harper’s classification of signatures

Haig and Harper (1997) believe that a company can have a logotype, a symbol or a combination of the two in the same device. They classify them in the following way: abbreviations of the company name formalised in monograms or acronyms; graphic representation of the name using stylised lettering; and the combination of a name and symbol expressed graphically in a distinctive form.

This classification model is effective due to the conservative nomenclature used, and proposes three large groups that allow several relationships between the verbal and visual sign to be placed within them. It is not useful to me, however, as I consider it too simplistic, offering insufficient details to be able to characterise the different sectors that we have evaluated previously. It also does not take into account devices of a historical nature.


Figure 4.10. Haig & Harper Signatures Classification

Trademark precedents; a semiotic and taxonomic classification by Mollerup

Internationally, one of the most important references is Mollerup (1997), professor of Communication Design at Swinburne University of Technology, Melbourne. The author develops a basic taxonomy in three tables that classifies trademarks in relation to graphic form and semantic intention. In the first table, he ranks brands according to their precedents, ordering from the type of brand, its function, and its motivation. Of the classifications I reviewed, it is the only one that takes into account the archaeology of the brands referring to the sources and origin of many of the existing formulations.
In the second table, he establishes the principles of division according to fifteen semiotic categories. In the third table, he describes sixteen taxonomic trees of trademarks divided into graphic and non-graphic marks. Per Mollerup (1997) considers that graphic pictorial marks can be figurative or non-figurative; these, divided into descriptive marks (images or diagrams describing what they represent), metaphoric marks (metaphorical, shares qualities with what it represents), found marks (arbitrary symbols, represents an object but changes its meaning). Then there are the non-figurative marks (arbitrary symbols whose representation is abstract).
an iconic and pictorial quality. They are subdivided into name marks (comprising proper names, descriptive names, metaphoric names, found names and artificial names) and abbreviations (acronyms and non-acronym initial abbreviations).

Chaves and Bellucia’s classification of brand types

In the second of the classifications made by Norberto Chaves, it should be noted that the term “imagotype” is no longer used. Together with Bellucia (2003), they divide trademarks into two large groups of logotypes and symbols, detailing the particular relationships of the kinds of logotypes and the graphic elements that comprise each group. In this description I find that the use of adjectives such as Standard, Exclusive, Retouched, and Singular opens up a very relative scope of interpretation since the limits of what each adjective defines should first be determined.

<table>
<thead>
<tr>
<th>Logotypes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calvin Klein</strong></td>
</tr>
<tr>
<td><strong>Canon</strong></td>
</tr>
<tr>
<td><strong>BRAUN</strong></td>
</tr>
<tr>
<td><strong>CAT</strong></td>
</tr>
<tr>
<td><strong>Cadbury</strong></td>
</tr>
<tr>
<td><strong>NESCAFÉ</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Symbols</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Iconic symbols</strong></td>
</tr>
<tr>
<td><strong>Abstract symbols</strong></td>
</tr>
<tr>
<td><strong>Alphabet symbols</strong></td>
</tr>
</tbody>
</table>

Figure 4.14. Chaves & Bellucia Types of Brand Classification

In contrast, with symbols they describe three variants that do not make reference to their formal composition, but to their meaning. It is necessary to consider that they also do not consider devices of historical
character such as shields and seals. The most notable element of this classification is the non-explicit consideration of the difference between those models composed mainly of a verbal sign, and those with a visual sign.

Rodríguez’s classification of brand species

Rodríguez (2005) presents his own classification and calls the different categories “species”, established by the linguistic content of the brand. The author considers logotype and brand as synonymous with graphic mark.

This is a complex proposal, terminologically speaking, since it uses a confusing nomenclature that includes neologisms, making it difficult to determine the boundaries between one classification and another. It also contradicts definitions provided by dictionaries as well as the example shown in the table. This contradiction can be observed in the cases of logotypes, brands, and ideograms. From my perspective, it makes no relevant contribution that can be considered in the new proposal.

<table>
<thead>
<tr>
<th>Brand species according to its linguistic content: Abelardo Rodríguez. 2005.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Tornel</td>
</tr>
<tr>
<td>Initial</td>
</tr>
<tr>
<td>Mextrasa</td>
</tr>
<tr>
<td>Emblem</td>
</tr>
<tr>
<td>Ideogram</td>
</tr>
<tr>
<td>Flanita</td>
</tr>
</tbody>
</table>

Figure 4.15. Rodríguez Gonzales Brand Species according to its linguistic content Classification
Diagram of Chaves, Bellucia and Cassisi’s classification of brand “Mega-types”

The latest classification made by Chaves, together with Bellucia and Cassisi (2006), is formulated in a circular manner, and distinguishes symbolic identifiers from verbal identifiers, placing in the first the relationships between combinations of symbols and logotypes, isolated symbols, and symbols that integrate logotypes into their form. In the second, on the same axis where the symbols are placed, it contrasts with logotypes, flanked by those with accessory, and those within a form with insufficient autonomy to stand alone.

This is a proposal that I find very interesting, since the very form of the arrangement of the models indicates a certain relationship between them and does not establish limits between one model and the other. The generic separation between symbolic identifiers and verbal identifiers is also important. This was already seen in the version that he made in 2003 (Fig. 4.14), but establishes relationships that can be described formally while avoiding the use of adjectives.
However, I think that it is still subjective in some aspects; for example, it is difficult to distinguish the difference between logotype-symbols and logotypes with backgrounds, since in the description of the former it tells us that the shape and the logotype are integrated in the same way, while on the other hand, it describes logotypes with backgrounds as logotypes inscribed on an inseparable background. In these descriptions, there is a certain ambiguity, since it is not clear what is considered inseparable, since logotype-symbol backgrounds could be considered inseparable or non-autonomous. The examples it offers, except for the case of Harley Davidson, have never been seen without the verbal sign. Another aspect that I also consider to be subjective is the use of the term accessory; in the case of logotypes with accessory, it describes them as those devices formalised with logotypes that are accompanied by a sign that has no autonomy that can be identified in isolation. I observe two inconsistencies: the first is that the Davidoff logotype, which is included in the "Logotype" section, is emphasised with a line below it; I understand that this line is an accessory like those used by the Clinique logotype included in the "Logotypes with accessory" section. Another inconsistency is found in the case of British Airways, since the author considers that the accessory does not have the autonomy to be identified in isolation. However, if I look at the regulations of the company (British Airways. Brand Guidelines Version 1. 1.9 Summary. September 2007) we can verify that the isolated version of the logotype is normalised.

Wheeler’s typology of marks

Wheeler (2006) proposes a classification formed by two opposites of a graphic mark, the literal word-driven and the symbolic image-driven. Wheeler (2006, p.53) considers graphic mark, trademark, symbol, mark, and logotype as synonyms. The author understands that a logotype can be a wordmark - a representation of the name without any pictorial device; letterform - a unique design using letterforms as a mnemonic device for a company name; emblems as a mark in which the company name is inextricably connected to a pictorial element; pictorial marks are immediately recognizable literal images that have been simplified, and abstract/symbolic marks are symbols that convey ideas and often embody strategic ambiguity.
The most important feature of the classification, which is two extremes determining models where the verbal sign predominates and those where the visual sign predominates, as the author indicates, is that we can place an almost infinite variety of combinations within it, and where the boundaries that separate them are not concise but rather flexible and undefined, with many trademarks combining different categories. The author points out that the categorisation of trademarks can help the designer determine the design approach by analysing what is most appropriate according to aspirational and functional criteria, and that the designer will determine what rationally is best suited to the needs of the client.

**Spencer’s updated version of Weckerle’s classification**

Spencer (2011, p.3), in *Evaluating Trademark Design*, proposes a simplified and updated Weckerle classification. It is a simplification of the Weckerle version (1968), although the clarification and simplification of the subcategories is still ambiguous, as the condition of the logotype is paired alongside abbreviations – from my point of view a logotype can be an abbreviation. Also, considering the aspect-oriented, product-oriented, and value-oriented aspects, I find that these conditions are relative, since the Jumbo elephant, LG’s face, and Apple’s apple can all transmit values of soundness, happiness and temptation respectively. I believe that it is limited and complex in its understanding, since crossing concepts alone can create contradictions; we could almost determine that it is not a
classification as such, but rather a table of parameters from which I can not perceive any utility for the design process.

<table>
<thead>
<tr>
<th>Types of Trademarks</th>
<th>Typographic</th>
<th>Graphic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Logo-type</td>
<td>Abbreviation</td>
</tr>
<tr>
<td>Typographic</td>
<td>Microsoft</td>
<td>IBM</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>USA</td>
<td>AT&amp;T</td>
</tr>
<tr>
<td>Name-oriented</td>
<td>Apple</td>
<td>Verizon</td>
</tr>
<tr>
<td>Product-oriented</td>
<td>PepsiCo</td>
<td>IKEA</td>
</tr>
<tr>
<td>Value-oriented</td>
<td>P&amp;G</td>
<td>Caterpillar</td>
</tr>
</tbody>
</table>

Figure 4.18. Spencer Weckerle’s updated Classification

Shumate’s four identity components and concepts

This author’s framework is structured in four categories -- signatures, wordmarks, monograms, and logotypes. In this classification, it is necessary to specify the meanings of the terms used by the author, as they condition the sorting criteria. According to the author, signatures are those expressions that correspond to verbal signs made up of a specific typeface and that do not contain any added graphic elements. Wordmarks correspond to those verbal expressions that have been customised with a gesture, be it a link or a graphic element. Monograms, according to the author, are a type of trademark that includes or is perceived as the initials of the functional name of the organisation, and these are usually accompanied by a signature, but sometimes appear alone. And finally logotypes – specific designs that do not refer to letters – are elements that work individually, although usually used with a signature. Based on these criteria, the author outlines the relationship between typologies and what they can represent, which he calls the four types of identity: corporate activity, corporate name, abstract, and corporate ideals. This classification proposal is interesting since in the classification of models it contemplates the possibility that models can complement each other and form more
complex models in combination. How it separates the formal question from the conceptual question is also important, avoiding the mix of criteria we have observed in previous classifications. However, I can see some problems in the nomenclature of the models, as they appear to be interpreted from a very personal viewpoint, barely contrasted with the definitions offered by dictionaries; this issue can lead to errors depending on each person’s interpretation of the term.

After reviewing the various classification proposals, the study highlights several critical considerations. The first is the issue of how terminology conditions the proposal, since all of them reflect the problem posed at the beginning of the thesis in the sense that there is no common criterion for the terms used to refer to devices, nor to describe them; therefore this becomes a starting point that conditions the criteria for ordering and understanding. Another consideration that stands out is the fact that the time at which the classification was proposed affects the problems and cases studies that the author considers as referents, and that, in contrast, nowadays have been passed over. This makes me question whether the proposal was influenced by the temporary context of the market or by the style imposed by the orthodoxy of the discipline.
have also observed that many of the studied cases are subject to contradictions and conceptual overlays that lack practical meaning. And that leads me to consider another point, which is a group of proposals that are posed as phenomenological exercises, and which lack an analytical interpretation that can be integrated into the methodology of trademark design. The final consideration is that none of the authors consulted considers historical devices as having a formal idiosyncrasy that must be taken into account; this, in some way, leads me to the reflection in "the establishment of a method" where I pointed out that the designer tends to consider transformation as renewal, in view of the future, and rarely considers the past as an anchorage from which to progress.

**Classification Proposal**

During the thesis I have been establishing a reflection on the methodology of trademark design and the range of possibilities that creativity must consider, as well as the relationships established between these possibilities and the conventions associated with a categorisation of everything regarding the supply of a product or service. Classifying the range of possibilities that creativity should contemplate becomes a subjective position that must respond to the ideological reasoning developed up to now. This classification proposal has the function of establishing a finite set of models of the relationship between visual and verbal signs, defining the relationship between them, and stabilizing their naming terminology. I should not forget that the ultimate function of this proposal is to help in the methodological process, so it will have to offer a matrix for analysis and reasoning. Also, it only focuses on the top structure of associative perception (Fig. 1.1.), those basic elements that can be registered, which excludes colour; although many authors consider colour to be as important as a trademark, I believe it belongs to a lower layer in this hierarchy. As WIPO (2017) stated, devices based on a single colour are often difficult (and in most countries impossible) to register, probably because the limits of tonality and its nuances are subject to variable perception and are difficult to parameterise.
The three natures of a trademark

I establish three natures for the use and genesis of trademarks, and as I have been analysing, trademarks originate from three premises: semiotics, design, and history. All of them are interrelated since they are all composed of the same elements that must be interpreted, the visual and verbal sign. In order to begin the classification of models, within each one of the characteristics of a trademark, I should incorporate the models of the relationship between the visual and verbal sign that have been studied throughout this thesis (figure 4.20.) and which belong to each one of the premises. As I have detected in the previous study, when considering a classification, terminology becomes key to linking a meaning with a formal reality. This proposal takes into account this issue and avoids biasing the classification of models based on the names they adopt, but instead aims to characterise them based on the reality that the relationship between the visual and verbal sign brings, and then incorporate the most appropriate term from the semantic field (fig. 1.7.) analysed in the first chapter.

The **Semiotic Nature** formal classification models (figure 4.21.) represent those graphic marks made essentially of a verbal and visual sign as two opposites. The simplest models are located on this axis: written words with no symbolic resource, pure verbal signs where just the specific design of the font provides symbolic value. On the other side, I find contrasting models: symbols or pictograms with no verbal signs to read.
Design Nature formal classification models (figure 4.22) correspond to the modern concept of the graphic mark. Designers create these models by combining visual signs and verbal signs in different positions – sometimes the verbal sign is inside the visual sign, in a balanced combination, or the visual sign is annexed within the verbal sign. These take into account the importance of developing a graphic language, providing functionality and communication capabilities. They are versatile models that can be exclusive in their use, or compatible as versions of the same brand.

The Historical Nature classification models (figure 4.23.) group together all formalisations created since humans began social behaviour. As already mentioned, brands are not a new idea, having been used for thousands of years to communicate ownership, origin and social status; throughout time different brand formalisations have appeared. These can also be classified according to the presence of visual or verbal signs.
The Basic classification proposal is completed once the three natures of formal models (figure 4.24.) are mixed. This will be the basis for deciding on parameters, and how they relate in the formalisation of a graphic mark.

Figure 4.23. Visual identity devices classification Proposal. Historical nature models

Figure 4.24. Visual identity devices classification Proposal. Mixed models
Figure 4.25. shows that mixed compositions can also be composed with devices of a historical nature.

To complete the classification proposal, the lines of interrelation between the different models are incorporated; these indicate the fluctuations from pure models to nuances that incorporate characteristics of the surrounding models. The proposal also highlights the establishment of models where the interpretation of the device is first made from the visual sign, which means it prevails over the verbal sign. Accordingly, in the other half of the circle the same connection is shown, however, this time predominance is for the verbal sign over the visual sign.

**Classification Matrix**

Once the device models have been standardised and organised, I have to create a support so that the classification is functional in the design methodology for trademarks. This tool should allow the characterisation of devices from different sectors of consumer products and services, a matrix that allows me to typify the cases in an outline, and to display which are archetypal.
or atypical in their use. As Figure 4.26. shows, following the classification scheme, the axes, which structured the relationships between verbal and visual signs, are transformed into 32 boxes where the collected information is placed. These are distributed considering the models presented in the classification as well as the areas of confluence between models, thus attempting to open up the spectrum of variants sufficiently, and allow the incorporation of a caseload that is expected to be complex and disordered.

In order to validate whether the classification and its characterisation matrix are sufficiently versatile to classify any type of trademark, it has been tested with approximately 200 trademarks, which belong to organisations of a diverse nature: from multinational product and services companies, sports clubs and public bodies to government agencies and NGOs. The result can be seen in Figure 4.28., which verifies that all the cases analysed can be classified into some of the models that the matrix parameterises. However, it should be noted that I have encountered different levels of difficulty in determining placement. Some cases more clearly fit a certain model, while others have been more
complex to incorporate, since the relationship between the verbal and visual sign responds to more ambiguous associations. This has made it essential, in the process of categorizing the cases, to unify the criteria that determine the formal characteristics that are relevant to the category. Figure 4.27. shows the relationships of 33 examples that correspond to each of the types determined by the matrix and the criteria established to assign each case to each category, according to the relationship between the visual and verbal sign. This process has allowed me to classify three groups of models according to their ease of validation in a category: the groups of pure models, compound models, and mixed models. Figure 4.29. shows the different areas corresponding to each group.

![Diagram showing relationships between visual and verbal signs](image)

Figure 4.27. 33 Parameters for matrix characterisation criteria

Group of pure models: those models that unequivocally respond to one of the nine types parameterised by the classification.

FOR PDF SCREEN VIEW, CHECK FIGURE 4.28.
Group of compound models: I must first consider that the models belonging to this group correspond to the central classification model, which determines a balanced, independent composition of the verbal and visual sign, with the peculiarity that they respond to all combinations between the outer categories of the classification; as Figure 4.29. shows, classifying them in 9 cases.

![Characterisation matrix categories adjustment. Source: Own creation](image)

Groups of mixed models: Although they are delimited within a model classified in the two previous groups, mixed models are those that are less stable in their classification. This can be due to two reasons: the first responds to those cases that result from the confluence of two categories and correspond to those squares located on the outer curve, or those cases that are located in the nucleus of the matrix converging in some features of other opposing models.

At this point, it must be stressed that the matrix is aimed at determining a phenomenology of visual expressions according to predetermined parameters. It is also essential to define the inexorable volubility of the relationships between the visual and verbal sign, limiting those displayed to majority cases that are relevant to the analysis. That is why mixed model groups are integrated into one of the 17 categories that determine pure models and compounds, and in the process of mapping
the caseload, they will be specified as models that vacillate in their formalisation.

Tuft (1997, p.9) indicated in his book Visual Explanations that the one who discovers an explanation is the one who builds its representation and that when the principles of design replicate the principles of thought, the act of structuring information becomes an act of understanding. Yau (2011, p.XV) for his part asserts that today it is incredibly easy to collect information, which the Internet can do quickly and easily. This wealth, he argues, can help improve decision-making, communicate ideas more clearly and open a window that looks at the world more objectively. The author also indicates that the data alone are not as interesting as the information that we can extract, and the information displayed can allow the reader to find patterns, as well as trends or correlations that could not have been analysed with only the data. And it is in this spirit that the parameterisation matrix for the models of visual identity devices should help in trademark design methodology. It should provide a new vision and analysis of the environment of a given reality that the designer has to transform. In order to check the versatility of the matrix in the design process, and based on the data collected in the characterisation phase of

![Diagram](image-url)

Figure 4.30: Trademarks formal characterisation matrix for Universities devices from International scope

*The total of cases characterised corresponds to the sum of rows that result from the benchmark list as in chapter 2 above except in cases where the university has more than one logo, with one has been considered individually.*
the international and Spanish university sector, Figure 4.30 displays the results obtained in the analysis matrix, showing a new perspective, visually much more relevant, which simultaneously expresses and corroborates the predominant presence of certain models of relationship between the visual and verbal sign.

Once I have reviewed its effectiveness in the case studied previously, I could consider new functions for the matrix, such as in Figure 4.32, which shows it is also useful when displaying the evolution of identity devices for a series of companies; how their devices have evolved, as well as considering whether the factor of time has conditioned this evolution.
I wondered how we could move towards a model of mapping that not only studies the most commonly used models in a particular sector, or their evolution, but also allows me to relate the cadence between the verbal and visual sign. Our aim is that it could also be expanded with more detailed design features, such as typography and the colour used, tying these formal characteristics to different parameters of brand positioning, such as price, target audience, country of origin, year of foundation, etc. If this analysis could be done quantitatively, it would also allow me to determine the formal constants of trademarks according to a series of characteristics that configure their environment. Based on the analytical potential resulting from these observations, one could think of developing a more ambitious project. An online tool of an informative nature, composed, on the one hand, of a permanent database containing the formal characterisation and positioning of competing trademarks in different sectors of services, products and ideas. And on the other hand, a mapping tool allowing the cross-referencing of the formal characteristics.
with those of positioning. If I consider the value of characterising the devices in the university sector for the case study regarding the Universitat de Barcelona, this tool would not only have facilitated the task of characterisation, but would have also allowed an increased number of cases to be analysed. Hence, the increased number of values obtained would not merely have been based on the most acclaimed universities, but rather from a large part of the university sector, providing an immediate, more complete, more objective visualisation, while facilitating the interlocution between the designer and the agents validating the strategy to follow.
5. Trademarks Mapping Engine

Aiming to integrate a typological appraisal into the process of trademark design, up until now the thesis has been able to apply a methodological synthesis in the case study of the Universitat de Barcelona. This showed that taking into consideration the type of device can be relevant in the process of designing trademarks situated in sectors where idiosyncratic visual expressions are perceived as conventional by their audience. Also, the possible relationships between the verbal and visual sign adopted by trademarks can be limited in a classification and ordering system, allowing the possibility of typological appraisal to be applied to any sector of products, services or ideas. And finally, it has been observed that the adaptation of a characterisation matrix which follows the parameters of classification can help the designer to integrate a typological appraisal into the decision-making process, facilitating the visualisation of results and offering an informative potential to all those involved in the strategic decision-making process. In this chapter, the integration of a typological appraisal of the trademark, in the methodological synthesis that has been developed, will be justified in order to lay the foundations and subsequent development of a mapping tool that allows the analysis of the common visual expressions of trademarks according to the sector where they are situated and their strategic positioning.

Trademark design method fixation

Let me consider once more how the optimisation of the methodological process for trademark design should align the relevance of the designer’s proposal. In the observation and analysis of the process carried out for the Universitat de Barcelona, as well as the subsequent analysis of the relationship between the visual and verbal sign, both approaches concluded that the visual culture integrated in the conventions of consumers and users of a category for a product or service can predetermine the visual expressions of the devices that operate within it, and therefore may condition the designer in the choice of a specific model for the relationship between a verbal and visual sign. I have also demonstrated the variability of these relationships and have typified them
in a classification of models with which trademarks are expressed. It is at this point I can affirm that establishing a relationship between the device model and the characteristics of the product or service it represents, the intended audience and the category where the offer performs can become a new parameter in the methodological model assessed in the previous chapters. This statement is supported by the idea of adding a new principle to the proposal (figure 5.1.), which divides the section on the design brief in two parts. The first maintains the principle of the relevance of meaning, with its two associated parameters: that the proposal must respond to the vision of the organisation, and also with the positioning of the brand and the characteristics of the product or service it offers. And adding a new principle, which can be called "Category appropriateness", which includes an analysis of the conventions the audience has on the categorisation of the offer and the sector where it performs. The new proposal discerns what the design brief appraises regarding the vision of the organisation and the positioning of the product, to what responds to the conventions of the category. This separation makes sense – considering the aim of an entity, and how it would like to be seen, differently from the conventions assimilated by the audience – and ensures the offer is recognised correctly in a specific category. This question is more relevant if I consider that the adaptation, or not, to the category is a decision that can influence the effectiveness of the design proposal, but under no circumstances should be considered as an element that always conditions the result. It is a factor to be integrated according to the objectives of the positioning strategy.

![Figure 5.1. Proposal for 5 Principles for designing appropriate Trademarks](image)
**Mapping engine as a tool for methodological improvement**

The alignment of the method is not only understood as a result of a reflection on the creative process, but also, as expressed in the second aim that concluded the research question: to include in the methodology a system that allows you to evaluate the common visual expressions of trademarks according to the characteristics of their positioning and the category of product / service where the offer performs. In this spirit, I have experienced the versatility of the characterisation matrix proposal and to what extent it can offer a map for typifying trademark models following specific criteria in the selection of cases. Returning to this versatile and visually highly effective essence of the classification matrix, and developing it into something that closely responds to the new methodological principle should transform a theoretical appreciation of what it can become into an operational reality. This consideration leads me to speculate how useful a tool would be to analyse the formal characteristics of trademarks that operate in a competitive environment of a particular sector; being able to relate them to a specific positioning in order to offer a theoretical framework that would allow us to analyse their suitability. A suitability that is not defined to take a specific decision, but rather to establish a level of knowledge that empowers both the designer and the client in decision-making founded on relevance, the categorisation of the sector and the degree of risk that must be taken if the proposal is to distance itself from the group. And what the design decisions should be according to the effect to be achieved, based on the typological model, in terms of typographic style and colour palette.

To begin a structural approach of this characterisation and mapping tool, we must consider the analysis carried out in the research question, regarding the presumed causes of mimetic visual expressions of identity devices in different sectors of consumption and services. We have observed that these peculiar expressions are determined by different factors, related to the product itself; related to the sales environment; related to the culture assimilated over time by a category; to the story of brands that give them meaning; or even to market dynamics and the assumptions that consumers or users should consider to assess their affinity.
Figure 5.2. outlines the complexity of the relationships established by the trademark with its audience, and what factors should be considered and how they affect the relationships of perception and the construction of its meaning. It establishes four conditioners, with different peculiarities, that act in an interconnected way.

Relations frame between trademarks, owners and audience for building a Trademarks mapping engine. Source: Own creation.

These are:

**Who:** It is the part that issues the message, which owns the trademark and acts with the intention of creating meaning to obtain a result, albeit the sale or supply of a product or service, of a public or private nature, or as an organisation of a social group with a common purpose of action. Two aspects can be relevant when analysing its relationship with the trademark it holds: the length of time it has carried out its communication activity, and its geographic origin.

**What:** It responds to what is offered and the trademark represents. It can be a product, service or idea, and can have a high, medium or low price; it can be a free service but with a value or an idea not subject to economic value.

**Whom:** It corresponds to the part that interprets the message, perceives the trademark and decodes the message it receives, giving it a meaning. The characteristics of the receiver, or the target as it is called in marketing terms, draw most attention when trying to understand how the message can be aligned with these. Characteristics such as age, gender, purchasing power and social status.
**Where:** Finally, I consider the environment where contact with the product or service occurs. As a significant part that conditions the relationships between the three previous conditioners, the first is the specific place where it occurs, which could be through a virtual interface like an online business, or in a physical establishment.

As can be seen, there is also a second level of interconnection that associates the conditioners described with two fundamental aspects: the positioning strategy and the means through which it will be deployed. These are also connected to the intervention, the motivation of this thesis, in the process of trademark design, which, based on a strategy and communication media, takes into account all the conditioners and factors that influence the communication process.

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Theoretical frame for building a Trademarks formal mapping engine. Source: Own creation.

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**Figure 5.3. Theoretical frame for building a Trademarks Mapping engine**

In order to start drafting a theoretical framework of the mapping engine, I take the idea expressed in chapter 2 regarding the two structures that formed the expressions of an organisation, with the pyramid of expression of the visual identity (figure 1.1.), and the reception process of the audience, conveyed with the pyramid of impressions (figure 1.2.). In this case, I believe that the tool should be able to analyse trademarks from these two processes, determining the patterns of categorisation for products and services and, therefore, of the visual identity devices that represent them. Figure 5.3. shows how these two structures face each
other and come together in a process of negotiation between the characteristics of the “offerer” and the product or service being offered, and, on the other side, the characteristics of the target audience that must assess the offer. The decision to buy something, use a service or merely give a good opinion of an organisation, will not only be conditioned by the coincidence of a group of interests, but will also be determined by the acquired experience of the product itself, and above all, in the idea of relevance; interpreted as something that fits into some conventions of categorisation, either by price, consumer or service sector, type or purchasing power, among others.

**Engine description**

Accordingly, as shown in Figure 5.4., the mapping engine must work from a tool that allows the constants detected in a database to be displayed, having previously characterised a series of trademarks, introduced the characteristics for the four conditioners expressed also in figure 5.4., the characteristics for the device model, the colours and the typography used, as well as the data relative to the owner of the trademark, the data related to the environment of the offer and the data regarding the target public of that offer.

*Mapping engine main idea. Source: Own creation.*

![Mapping engine main idea](image)

Nowadays, we have a source of information such as the Internet, which allows us to collect, with relative ease, data from organisations that operate in institutional, political and commercial areas; obtaining information like the year they were founded, what types of products or services they offer, how they announce themselves in their positioning and also how they become visible to their public. I can affirm that, as indicated in the process of characterisation for the university sector in
chapter 3, it offers a certain degree of reliability, validity and easy access that can help greatly in the process of collecting and characterising cases. It is also the source from which the organisation or company expects the consumer or user to take some purchase decisions or where an external audience can form an opinion about the organisation. Therefore, the Internet offers a double advantage: to obtain information easily from a reliable source, and that the source is the same place the interlocutors I am interested in analysing obtain their information.

As stated in the initial part of the thesis, one of its main motivations is to make a methodological contribution to the field of graphic design, and which has an impact on the way students, researchers and designers of trademarks structure and analyse the creative process; how they convey from a reasoned positioning the decisions they make, basing their arguments according to a predetermined objective. In order to disseminate the new methodological proposal and the trademark mapping engine, it will be very useful to use a web platform, as it will permit universal access, as well as enabling the execution of highly effective viewing systems. Web support also resolves one of the key questions that make the mapping relevant, which is to contain a sufficient number of cases to reflect a reality in a given sector. Consequently, this task should be tackled using a collaborative model, and carried out by students, researchers and professionals.

This issue generates the challenge of establishing common, unequivocal protocols that guarantee consistency in the characterisation criteria. Hence, the application should fulfil the function of training as well as that of disseminating. Figure 5.5. synthesises the architecture of the web, which consists of three sections: "about" performs the function of dissemination, the database is where the cases are entered and characterised, and another section allows the user to filter and combine
certain trademark characterisation parameters and then schematically display the data obtained in what I call the mapping engine.

If the structure of the web is revealed more fully, as in figure 5.6., the specific contents of each section are displayed: those of a public nature (continuous line) and those accessible only to registered users (discontinuous line), who from now on will be called contributors. These, as stated previously, will acquire a very important role, as they will be responsible for managing the database. As shown in the architecture, marked with a discontinuous line, they will enter and characterise the cases, and will be able to update them in the database section and also the mapping section.

![Website architecture. Source: Own creation.](image)

**Figure 5.6. Mapping engine website application architecture**

**Basic elements of the website design**

Beyond its functions, the website has also been conceived and approached as a design project, as it must guarantee effectiveness in terms of usability and visually understanding the results obtained. In addition, in order to make it known among designers, educators and researchers, it has been given a name and a visual identity that provides it with distinctive features.

To this end, the first step has been to come up with a name that, on the one hand, simply explains what the project is about and, on the other hand, is sufficiently simple so it can be registered as a web address domain. The name chosen is "Trademarks Mapping", which meets the first requirement, since it explains the essence of what can be done on this webpage, and also fulfils the second requirement, since ICANN has been
able to register the domain name with the termination .com. (see Figure 5.7)

![Engine domain registry. Source: Own creation.](image)

http://www.trademarksmapping.com

![Figure 5.7. Engine domain registry](image)

A visual identity is defined for the application based on the symbol used to identify trademarks, interpreting the circle conceptually as if it were a visual sign and the initials "TM" as if they were a verbal sign. Combining the two signs, the idea expressed in the classification proposal of the 9 device models is developed graphically.

![Engine visual identity. Source: Own creation.](image)

![Figure 5.8. Engine visual identity. Basic identity elements](image)

This identity element will be applied on both the homepage and the header of all the other pages of the application.
The selected colour range responds to functional criteria: the dark blue and its gradient fulfil the function of generating the predominant tone of the engine and the hierarchy of the different levels of information, while the fluorescent yellow and sky blue will act as contrast colours, in less quantity but enhancing the transcendent information in each case.

The selected typeface is PMN Caecilia, designed by Peter Matthias Noordzij in 1991, and according to Ulrich (2017), although it was designed to be used in print, works very well as a reading font on screen, due to its robust design and elegant cut that comes from its humanistic root. Amazon Kindle uses it as its default font on its devices, guaranteeing its quality and functionality. It is also appropriate as the typographic family has enough styles to hierarchically compose the different types of information the application will contain, and furthermore, it reads well in text with a small font size.
Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Sed diam nonummy nibh euismod tincidunt ut laoreet.

Dolore magna
Aliquam erat

Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Sed diam nonummy nibh euismod tincidunt ut laoreet.

From the definition of the colour palette and the typeface to be used, I create three “look & feels” in order to differentiate the sections. The section “about” will be displayed with a light blue background, with sufficient hatching to contaminate the background, aiming to convey a more technical aspect. The hierarchy of the text will be created by changing the body font, the style and with the help of continuous and discontinuous lines that will order all the information.

The “database” is composed of a white background with the typography in blue, also changing the body and style to order the information. In this section, blue-coloured blocks with different gradients of the same colour will help in developing the forms to characterise the different aspects of samples. The fluorescent yellow colour, as well as red, will be used to emphasise information or highlight interactive actions with the application. Lastly, the “mapping” section will be composed on a blue background.

Design of common elements

List of entries interface and database search engine. Source: Own creation.

Figure 5.11. Engine look & feel main sections

Figure 5.12. List of entries interface and database search engine
The interface that displays the cases entered in the database has an extremely important role in the whole application, since it is necessary for viewing the number of cases entered or for the process of updating and correcting, which is complemented by a search engine to find specific cases. Also in the mapping tool, this listing will be useful to display the cases resulting from filtering.

Engine general menu. Source: Own creation.

The general interface to allow navigation through the application will be entered from the general menu. It consists of two parts, one that will always be active and another that will be activated when a user navigates as a "Registered user". The colours will perform the function of displaying inactive parts with a tone clearer than those active parts, which will use solid blue, and when the user is in a section, the button will change colour to fluorescent yellow. Red is reserved for indicating if the navigation is being carried out as a registered user.

About section

This section mainly has the function of offering and distributing information about the website. It is to present the project, contextualise it in the essence this thesis encourages and to promote the method for trademark design, with the mapping engine as the main contribution to the method; its versatility and the potential it acquires in analysing relevance parameters for certain relationship patterns between trademark owners and their recipients. On the other hand, this section sets out the criteria for characterisation, both for the elements that are identified in each case, as well as the explanation of the classification matrix. Lastly, there is a section that explains the collaborative side of the project, offering the possibility of becoming a registered user that can participate in the task of entering and characterising cases.
Database section

For the task of entering, editing and displaying cases, a structured application has been developed with a series of characterisation forms. As shown in Figure 5.15, this section consists of four viewing options. In the first, new entries are recorded, loading samples of the device, formally characterising it and entering the characteristics of its relational context. The second option allows entries to be edited, which together with the first are only active for registered users. The third viewing option corresponds to a necessary step prior to mapping the results, where any user can define a series of parameters of analytical interest and execute the mapping. The fourth option is to display a summary of all the information on a specific case, which can be accessed from the list of cases entered in the database or from any mapping results that offer access to the list of cases found.
Registering cases

Entering cases begins with a form type module, which requires the name of the trademark, the website where the trademark owner promotes it and, if it corresponds to a group of trademarks, the common owner of these. The box with the date will be filled automatically, although the user can always modify this.

Formal characterisation

The formal characterisation interface requires two processes: loading three samples corresponding to the trademark of the organisation, and formally characterising them, indicating a model corresponding to the classification, as well as the typography and colours used.

Samples. As I have said, to register a new entry, it is necessary to load a sample of the trademark, and in order to ensure its validity, it is necessary to indicate the protocol to make it effective. The criteria I have established are that trademarks are taken from the website of the organisation and then verified in different applications via Google Images. I understand that since samples are collected from this page (Google Images) and our application is merely testimonial, not making any commercial use of the samples, no copyright legislation is being infringed.
So that the application does not generate an excessive volume in data transmission, the files of the samples should be converted to .png format with a size of 600 x 600 pixels. This format enables the files to have a small volume, specifically 64k. Moreover, .png format is displayed correctly on all browsers, is free of rights and allows high compression without losing quality, as well as a progressive image reproduction up to 16.7 million colours.

_Different compositions of visual sign and verbal sign registered as the same trademark. Source: Own creation_

![Deutsche Bank](image1) ![Adobe](image2)  
_Deutsche Bank AG  
Adobe Systems Incorporated

![AT&T](image3) ![Walmart](image4)  
_AT&T  
Walmart Inc.

![John Deere](image5) ![Vodafone](image6)  
_John Deere  
Vodafone Group PLC

Figure 5.18. Different compositions of visual sign and verbal sign registered as the same Trademark

When loading the main version of the device and complementary ones, if appropriate, I must specify exactly what I mean when a device is a variant of the composition of a trademark. Even if it is used by the same organisation, it may correspond to a distinct registration and therefore is a different trademark, which is why it is necessary to differentiate exactly when an organisation has different trademarks or when a trademark has different versions. As shown in Figure 5.19, the same owner may have different registered trademarks, which may or may not be used to market the same offer or different ones. In contrast, figure 5.18 shows how some organisations have a trademark that is represented with different alignments between the verbal and visual sign. These cases tend to belong to the classification models I have called compound relationships.
Consequently, the mapping engine will allow me to characterise both situations; cases in which the same trademark has different versions, and cases where an owner possesses different trademarks. The latter, as can be seen in registering cases, is recorded by creating a group of trademarks of the same owner.

Figure 5.20. illustrates a case where the same organisation owns different trademarks, where one of them has different alignments of composition between the verbal and visual sign.

As shown in Figure 5.15., the second part is where the sample is formally characterised. There are three formal elements the registered user will have to characterise:

- Model corresponding to the classification matrix. This is the central aspect for the extension of the proposed method, as previously analysed, where the registered user should determine, as explained in figure 4.29., which model of the 17 proposed corresponds to the sample. Figure 5.22. shows that each of the models is encoded with a number to facilitate this process.
- **Typography used.** This characterisation consists in determining what typographic style the verbal sign is expressed in, and in cases where the verbal sign is composed of two typefaces, it also enables the identification of the support font used. In order to do this, a typographic classification system has been established that allows you to draw semantic conclusions when viewing the mapping results. The large quantity of fonts that are currently available to designers makes the classification of their styles increasingly difficult to normalise. Over the years there have been many authors who have attempted to test this from a historical and technical approach, but it is difficult to find one that reflects the current offer, with aesthetic effects included, in the new contexts of online communication. However, it is important to understand the basic styles of typefaces, in order to reduce the search and selection of the correct typography. Starting with the classification made by Maximilien Vox in 1955, a system that was adopted as a norm in 1961 by the Association Typographique Internationale (ATypI) and in 1967 by the British Standard (BS 2961).

Maximilien Vox (1955) typefaces classification adapted for the trademarks font characterisation. Source: Own creation.

---

Figure 5.21. Maximilian Vox typefaces classification adapted for Trademarks font characterisation

If I analyse what the author proposes, the central circle of figure 5.21., I realise that for the purposes of consumer perception, the three categories of classical typefaces respond to technical criteria that, if you
do not specialise in the field, can be difficult to distinguish. In contrast, there are two categories that the author does not describe that have a relatively widespread use, such as decorative and rounded fonts. Since the objective of this paper is to characterise a formal expression and its semantic character, I believe that re-adapting this classification to simplify the three classic styles in one, as well as incorporating two new ones, offers a wide enough range to be able to characterise any typography.

The interface also includes the possibility of indicating that no typography is used, enabling the characterisation of those devices exclusively formed by visual signs. In addition, it also allows you to characterise a main and support typeface for those devices that use more than one font in their verbal sign.

**Parameters for trademark database formal characterisation. Source: Own creation.**

<table>
<thead>
<tr>
<th>Upload samples</th>
<th>Formal archetype characterisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic version</td>
<td>Upload image</td>
</tr>
<tr>
<td>Version 2</td>
<td>Upload image</td>
</tr>
<tr>
<td>Version 3</td>
<td>Upload image</td>
</tr>
</tbody>
</table>

- Technical requirements for upload samples:
  - Preferably .PNG files
  - Minimum 600x600 pixels
  - 72 dpi

**Fonts used**

- **Manual**
  - Classic serif
  - Modern serif
- **Black serif**
  - Italic
  - Sans serif
- **Script**
  - Decorative

**Colours used**

- **Visual sign colour**
  - Choose option
- **Verbal sign colour**
  - Choose option
- **1st Complementary colour**
  - Choose option
- **2nd Complementary colour**
  - Choose option
- **3rd Complementary colour**
  - Choose option

- **Seals, Stamps, Badges combined with a verbal sign.**
- **Monograms combined with a verbal sign.**
- **Letterings and signatures combined with verbal sign.**
- **Signs composition with visual sign predominance.**
- **Signs composition with verbal sign predominance.**

**Figure 5.22. Parameters for Trademark database formal characterisation**

**- Colours used.** The process of formal characterisation of the device ends with the identification of the colours used. On the one hand, the characterisation of colour application focuses on two main aspects: the colour used for the verbal sign and that used for the visual sign. It also offers the possibility of characterising 3 complementary colours. The aim of this characterisation is not so much to establish the specific use of
colour for each element but rather to display an appropriate palette if there is a predominant use of certain tones.

Figure 5.23. Database interface for Trademark formal characterisation

In addition, the colour catalogue offered limits the almost infinite nuances to 64 samples, with a 65th that provides a code for a device being characterised that uses more than 5 colours. One of the other characteristics of the proposed interface, as shown in Figure 5.23, is that as the classification model that corresponds to the device is indicated – the font style and the colours of the different elements that make up the device – an archetypal model will be formed resulting from the characterisation, which will be displayed in a box on the left. Later on, its function will be seen with the mapping engine.

On the formal characterisation of devices, the proposed model contemplates a certain scope in the idea of identifying the constants of a particular sector. However, one might think that the possibilities offered are limited by the infinite number of devices that can be found. While I agree that this characterisation will always be limited at a certain point, this point could be where I find the mimetic visual expressions of certain devices: those that use complex or diffuse composition models between the verbal and visual sign; devices that use more than three or four colours; or those composed with more than two fonts. In my experience, as a trademark designer, this point will never correspond to a significant quantity of devices, given that they are not good examples of well-designed trademarks, and thus should not affect the analysis the application aims to make.
Characterisation of the evolution of devices over time

The characterisation of previous versions of the device used by the organisation has a simple form, where the year the device was first used should be entered, and there is also a box to load a sample and another to characterise which model it corresponds to in the classification.

Characterisation: 4 contexts of relationship

The characterisation of the context of relationship that configures trademark categorisation has had to be established in an unstable framework, as another thesis would be needed in order to create a solid basis for a model of stable contexts. What the engine establishes are assumptions based on the previously expressed idea, see figure 5.26., where they are determined as those established in the conventions for the classification of these types of relationship between trademarks and the public that perceives them. Some of the parameters requested by the characterisation interface may be subject to ethical considerations, such as the gender and purchasing power of the target audience, precisely so
that designers have sufficient elements of judgment to change a cultural trend. The engine should allow us to detect these biases that, at times, are unethical.

Parameters for trademark database contexts relations characterisation. Source: Own creation.

<table>
<thead>
<tr>
<th>Who offers</th>
<th>What is the offer</th>
<th>To whom is offered</th>
<th>Where is purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country of origin</td>
<td>Kind of offer</td>
<td>Kind of receiver</td>
<td>Geographic coverage</td>
</tr>
<tr>
<td>Select country...</td>
<td>Product</td>
<td>Individual</td>
<td>Locally</td>
</tr>
<tr>
<td>Trade area</td>
<td>Service</td>
<td>Collective</td>
<td>Regionally</td>
</tr>
<tr>
<td>North America</td>
<td>Idea</td>
<td>Company (SME)</td>
<td>Domestically</td>
</tr>
<tr>
<td>South Central America</td>
<td>Specialisation</td>
<td>Gender</td>
<td>Continental</td>
</tr>
<tr>
<td>Europe</td>
<td>Specialized</td>
<td>National</td>
<td>Globally</td>
</tr>
<tr>
<td>CIG</td>
<td>Mass market</td>
<td>Masculine</td>
<td>Retail environment</td>
</tr>
<tr>
<td>Africa</td>
<td>Not relevant</td>
<td>Not relevant</td>
<td>Shop</td>
</tr>
<tr>
<td>Middle East</td>
<td>Price</td>
<td>Age</td>
<td>Brand owned shop</td>
</tr>
<tr>
<td>Asia</td>
<td>Luxury</td>
<td>16+5</td>
<td>Supermarket</td>
</tr>
<tr>
<td>Started activity about</td>
<td>High</td>
<td>25-65</td>
<td>Linked to a service</td>
</tr>
<tr>
<td>Before 1800</td>
<td>Standard</td>
<td>13-19</td>
<td>On-line</td>
</tr>
<tr>
<td>1800-1900</td>
<td>Low</td>
<td>6-12</td>
<td></td>
</tr>
<tr>
<td>1900-1945</td>
<td>Not relevant</td>
<td>0-5</td>
<td></td>
</tr>
<tr>
<td>1945-1960</td>
<td>Not relevant</td>
<td>Not relevant</td>
<td></td>
</tr>
<tr>
<td>1960-1980</td>
<td>Not relevant</td>
<td>Purchasing Power</td>
<td></td>
</tr>
<tr>
<td>1980-2000</td>
<td>Not relevant</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>2000-2010</td>
<td>Not relevant</td>
<td>High medium</td>
<td></td>
</tr>
<tr>
<td>After 2010</td>
<td>Not relevant</td>
<td>Medium</td>
<td></td>
</tr>
</tbody>
</table>

![Figure 5.26. Parameters for Trademark database contexts relations characterisation](image)

Who is offering

- **The place of origin of the offer.** This parameter is presumably something that can influence the character of a device. Even though what I understand as globalisation tends to culturally unify offers, origin has traditionally had a great influence on the visual and strategic approaches to trademarks, depending on whether they came from an environment of a determined culture.

- **Start-up period of the activity.** In the same way the historical component of the trademark has been relevant in the case of the Universitat de Barcelona, the application should be able to establish whether this is also true in other sectors of products, services and ideas. The start of the activity can be considered as the moment in which the organisation refers to its history, and as such begins to accumulate a legacy. Not all organisations assert this legacy, but it is often inseparable from their character and positioning. However, products resulting from a technological innovation occurring at a given time can lead to the opening of a new market niche, generating a rapid growth in the concurrence of offers and presumably a fast, mimetic display of trademarks. This creates a new visual paradigm caused by the improvisation of pioneers, or
technical/operational needs of the product/service or for other distinct reasons.

Database interface for trademark contexts relations characterisation. Source: Own creation.

What the offer is

- **Type of offer.** This parameter, although seeming to iterate the subsequent branding of the product, service or specific idea, through its definition aims to offer the possibility of analysing if the visual expressions of trademarks differs according to the type of offer.

- **Specialisation.** The degree of specialisation of the product can also be relevant, since an approach to a mass consumer sector can differ greatly from an offer aimed at a minority market of a specialised offer, where the consumer or user requires prior knowledge to analyse it.

- **Price.** For trademarks that are linked to an economic transaction, the price becomes a valuation factor on the part of the consumer, whose purchase decision can be influenced. In addition, the transmission of visual language oriented to identifying a value is a highly-used resource. This parameter can help the user of the engine to interpret the conventions of product cost in relation to its identity devices.

Who the offer is aimed at

- **Type of receiver.** If the receiver is an individual, a group or for those products and services intended for companies or organisations, may
be factors to take into account. Considering an individual as the recipient of the offer may differ substantially from considering an organisation.

The first can presumably orient the impact of the trademark towards connecting with more emotional factors, while the second may steer towards more pragmatic connections focused on efficiency and service quality.

- **Gender.** The consideration of gender in this parameter only aims to contemplate those products or services that have a strong orientation, for cultural or biological reasons, towards a gender; such as hygiene products, fashion, cosmetics, medical services. The registered user will have to characterise the trademark responding to the cultural reality of the environment where the offer operates and not an ideological position.

- **Age.** Trademarks that represent products, services or ideas may differ substantially depending on the age of the target audience; a child may have interests, needs, activities and distractions very different from those of a teenager, adult or senior citizen.

- **Purchasing power.** This parameter measures what the economic position of the target audience is. Like the gender parameter, this can lead to an ethical conflict when establishing it. Nevertheless, the characterisation has to be carried out when there are clearly perceived cultural and behavioural patterns related to the offer.

Where it is acquired

- **Geographic coverage.** The scope of an offer may influence the configuration of the identity device. If the market is exclusively local, the message can focus on an interpretation of some regional feature, whereas if the offer is global, it will be interpreted in a multicultural framework of generic conventions.

- **Commercial environment.** The space where the transaction takes place, whether involving products, services or ideas, has considerations regarding the setting and user experience, which could presumably also affect the display of the trademark and therefore its device.

As shown in figure 5.27, the characterisation interface is designed as a test type form, allowing activation of characteristics with the activation of boxes, which can include multiple selections to enable the characterisation of those offers that respond to more than one category.
Characterisation of the location of the offer in the Nice classification

The Nice Agreement established a classification of goods and services in order to register trademarks and service brands (Nice Classification). The trademark offices of the contract holding states should indicate, in the official documents and publications related to each registry, the number of classes in the Classification the goods or services, for which the trademark has been registered, belong to.

*Database interface for trademark Nice system classification of goods and services. Source: Own creation.*

Since this information is public, the corresponding Nice classification codes can be assigned to each trademark. Hence, the analysis of the formal constants of trademarks corresponding to a class can be relevant, even in assessing whether a new trademark proposal can be registered.

In the interface shown in Figure 5.28., we can see the coding form for the class to which the trademark is registered. This also contemplates the possibility of assigning several classes to a trademark and therefore allows multiple selection.

**Categorisation of products, services and ideas**

Regarding the criteria for the establishment of sectors for services, products or ideas, it should be emphasised that, for each case, the final category assigned must be valid, as the order can be modified and extended. It should be said that this part needs to be stabilised, and more in-depth analysis of the categorisation systems used by organisations and their recipients is also needed.
It should also be emphasised that what I am presenting is an open classification proposal, which can go on expanding at all levels of its categories. It undoubtedly will continue to expand, as the thesis has not been able to explore in detail more specific industrial sectors, and has only been able to investigate those general interpretations a designer perceives over a career of professional activity.
Parameters for the trademark database kind of service offered characterisation. Source: Own creation.

<table>
<thead>
<tr>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONSULTANTS</td>
</tr>
<tr>
<td>Communication</td>
</tr>
<tr>
<td>Law</td>
</tr>
<tr>
<td>Management</td>
</tr>
<tr>
<td>Real estate</td>
</tr>
<tr>
<td>CULTURE</td>
</tr>
<tr>
<td>Art galleries</td>
</tr>
<tr>
<td>Libraries</td>
</tr>
<tr>
<td>Museums</td>
</tr>
<tr>
<td>EDUCATION</td>
</tr>
<tr>
<td>Distance learning</td>
</tr>
<tr>
<td>Schools</td>
</tr>
<tr>
<td>Universities</td>
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<td>ENERGIE</td>
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<tr>
<td>Electricity</td>
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<tr>
<td>Gas</td>
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<tr>
<td>Petroleum</td>
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<tr>
<td>Renewable</td>
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<tr>
<td>ENTERTAINMENT</td>
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<tr>
<td>Cinema</td>
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<tr>
<td>Distribution</td>
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<tr>
<td>Production</td>
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<tr>
<td>Theater</td>
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<tr>
<td>Music</td>
</tr>
<tr>
<td>Festivals</td>
</tr>
<tr>
<td>Record Labels</td>
</tr>
<tr>
<td>Theater</td>
</tr>
<tr>
<td>Dance Companies</td>
</tr>
<tr>
<td>Festivals</td>
</tr>
<tr>
<td>Opera Theaters</td>
</tr>
</tbody>
</table>

- **Parameters for the trademark database kind of idea offered characterisation. Source: Own creation.**

- **Ideas**

- **Politics**

- **Religion**

- **Buddhism**

- **Orthodox**

- **Revolutionary**

- **Animals**

- **LGBT**

- **Minorities**

- **Secret societies**

- **Terrorism**

- **Database menu for trademark classification of products, services and ideas. Source: Own creation.**

- **Kind of offer**

- **Products**

- **Services**

- **Ideas**

- **The categorisation interface is structured with drop-down menus that open when clicked on, revealing the entire list of categories, arranged alphabetically through three levels, which go from generic groupings of products to subgroups and final categories. The final validity of the codified information is the final category, since the list is not closed and**
the administrator of the application can extend it at the request of collaborators or as a personal initiative.

Database interface for trademark classification of products, services and ideas. Source: Own creation.

**Definition of parameters for mapping**

As mentioned in the database section, before obtaining results from the mapping, a series of parameters indicating what is to be analysed should be established. The interface of this section allows different ways of activating groups of concepts or individual ones, thereby obtaining results regarding the formal characteristics of the trademarks within a sector, or even a sub-sector, or a combination of both.

Interface features to filter the mapping of trademarks in different categories. Source: Own creation.

FOR PDF SCREEN VIEW, CHECK FIGURE 5.35.
Mapping engine data visualisation

This is the most important section within the application, since it is where users can display and draw subsequent conclusions about certain conventions, assumptions and common features that link trademarks to a given category. In order to be able to view and interpret the information included in the database, there are six sub-sections available, each one allowing you to view the results obtained through filtering from different approaches:

Mapping modules architecture. Source: Own creation.

- Display the use of models
- Display the collected samples
- Display the relationship each model uses with colours and typography
- Display the archetypes generated by the engine according to the formal characterisation
- Display the historical course for the design of a trademark
- Display the use of models for a single organisation that manages different trademarks

Design of the mapping engine header

Figure 5.36. Mapping modules architecture

Figure 5.37. shows how the main menu of the mapping engine is arranged. On the left, the general menu for the application is maintained, while the number of cases resulting from filtering together with details of
the filtering itself are displayed in the centre. On the right, the engine allows us to restart filtering, edit the established filters, print out a version of the results, where the graphics are simplified on a white background to minimise ink/toner consumption and a button enables us to save a file in pdf format of the results obtained. At the bottom, arranged horizontally, there is a menu that allows the user to view the results obtained from different perspectives.

Mapping of models

In this section, the user will be able to view the results obtained according to the models that correspond to the proposed classification. This allows one of the principles promoted in the research question to be assessed, that certain mimetic visual expressions are perceived in
some product and service sectors, where the use of certain models prevails over others. In addition, it helps in assessing how the designer can take this into account when proposing a design, or redesign, of a trademark.

Displaying the results of the percentage of device models used will be done through the classification matrix scheme, by means of colouring each area, with the presence of cases indicated by different intensities of colour. This information will be accompanied by the percentage obtained for each model.

Mapping interface for visualize on the classification matrix use of the specific models. Source: Own creation.

**On bar graph**

![Bar graph image]

Figure 5.39. Mapping interface for visualisation the use of specific models on a bar graph

Below the display of models in the matrix, the same data is also displayed in a bar chart, showing the number of cases found for each model. The Y-axis is divided into four parts to indicate the relevance of the results obtained. If, in general, the distribution of the values obtained

Mapping interface for visualize on the classification matrix use of the specific models. Source: Own creation.

<table>
<thead>
<tr>
<th>According device classification nature</th>
<th>According kind of sign predominance</th>
<th>According kind of composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature of the models</td>
<td>Kind of sign predominance</td>
<td>Kind of composition</td>
</tr>
<tr>
<td>Semiotic Nature 14%</td>
<td>Visual sign predominance 7%</td>
<td>Pure models 95%</td>
</tr>
<tr>
<td>Design Nature 76%</td>
<td>Verbal sign predominance 26%</td>
<td>Composed models 5%</td>
</tr>
<tr>
<td>Historical Nature 9%</td>
<td>Balanced models 67%</td>
<td></td>
</tr>
</tbody>
</table>

![Pie chart images]

Figure 5.40. Mapping interface for visualisation the used models classification specific nature
does not exceed 25% this means that the results obtained are less relevant than a case where the presence of a model exceeds 50% or 75%.

In the line of reasoning for the classification system of devices, there were three fundamentals that configured the classification criteria: the nature of the model, if a type of sign is predominant over the other and if the model is pure or compound. The model-mapping interface incorporates the examination of these fundamentals, allowing users to identify the specific cases assigned to a value by clicking on the information icon. This module will allow users to evaluate whether there is some correspondence between certain fundamentals of the device. Also, information regarding the time of the device’s creation; the function carried out by the verbal sign and also the visual sign; whether it is compound or pure, can link it to one of the features of the four relationship contexts, which were established in the characterisation section.

Mapping interface for visualise colours used in the trademarks collected. Source: Own creation.

The mapping offers a view of the predominant colours; for both the verbal and visual sign as well as their complementary uses. The interface display is concentric in a chromatic circle, activating the colours according to the presence of one of the 65 samples. It is complemented by the selection of the 4 most commonly used colours for each of the elements.
The display interface for the fonts used in the verbal sign is expressed through a bar chart. As shown, the relative data are expressed for both the main and complementary font. The total percentage used is indicated, followed by the percentage of use for each of the styles and also the number of cases that have been counted for each style.

Display of samples

As a testimonial component of the mapping engine, in this section all the samples resulting from the parameter filtering can be viewed, available in both the main version and the complementary ones for the same trademark. In addition, this interface allows the examples to be shown in alphabetical order or the order of models defined by the classification matrix.
This view, by clicking the "i" icon, enables the name of the trademark to be identified and to access the display section for the characterisation of the case.

Mapping interface for visualize samples alphabetically. Source: Own creation.

Figure 5.44. Alphabetical order samples visualisation

By clicking on the name, the application redirects users to the website of the trademark owner. In the event that the user is in "registered" mode, the database can be accessed and any aspect of the characterisation can be edited.

Mapping interface for visualize samples by models. Source: Own creation.

Figure 5.45. Models order samples visualisation
In order to prevent the fraudulent use of any of the trademarks that appear on the website, two dissuasive measures will be taken. On the one hand, the programming of the website will ensure no trademarks can be downloaded, using transparent shields in front of each device. In addition, in the footer of the entire website, there will be a legal notice warning of the non-commercial function of the project and possible indictment for the crime in the case of fraudulent use of the images displayed in the mapping.

Combined display

This module allows users to view the relationship between a specific model and the colours used, either for the verbal sign, the visual sign or as complementary colours.

Mapping interface for visualize relations between models and use of colours. Source: Own creation.

![Diagram](image)

Figure 5.46. Relations between models and colours mapping interface

For cases of models composed of a single visual sign or a single verbal sign, the opposed option will be invalid due to its absence. Clicking on the model in question, which has been activated in the matrix, will perform the action. This will allow users to view the number of cases that correspond to it, as well as the colour palette. It will also allow to see the four most used colours, and the number of cases that correspond to it, once more. As in other sections, by clicking on cases the engine will direct
to the database to view them, and in the case of a registered user, to edit them.

The other module that comprises the combined view is very similar to the previous one, but analyses the font style used by the verbal sign, in its principal and support modalities, while the interaction with the information will be the same as for colours. The comparative study of the two views can even explore if there are some patterns in relation to the models used, the colours used and the typefaces used.

Mapping interface for visualize relations between models and use of typography. Source: Own creation.

![Relations between models and typography](image)

**Figure 5.47.** Relations between models and fonts mapping interface

Display of archetypes

As explained in the section on formal characterisation, the automatic generation of archetypes has been incorporated with the information obtained from the models described in the classification matrix, the characterisation of colour and also that of typography. Figure 5.49. describes how the archetype is constructed combining the data collected from the 17 classification models, together with the 9 typographic styles, obtaining 145 models. If we combine these models with the 65 samples, considering we can contemplate the repetitions of colour between the visual and verbal sign but not the background colour, as shown in Figure 5.50. about 39 million possibilities are obtained for archetype generation. This data does not aim to provide a figure, but
rather offer a reference. As cases are introduced, the repetition of some archetypes are observed, which will be transcendental when calculating the probabilities of repetition.

The display interface of matching archetypes is arranged in four calculations. The first considers the absolute values to show the coincident archetypes. In the second the model prevails above the other values, while in the third and fourth, colour prevails in one and
typography in the other. In each of the views, the number of coincident cases can be consulted and what the percentage is in relation to all the cases resulting from the filtering.

*Figura 5.49. Archetypes variations calculation*

**Historical evolution of devices**

Throughout the thesis, it has been emphasised the way in which trademarks are influenced by their historical legacy or how it prevails to strengthen a trademark’s position. This section offers the possibility to analyse the historical course of the visual devices of trademarks and observe whether they have always maintained the same model, or have evolved.

*Mappiing interface for visualize historical devices evolution. Source: Own creation.*

*Figura 5.51. Devices evolution mapping interface*
The interface design is composed of two blocks. The first displays the device changes that occurred, configured with three elements to help the analysis: first is the list of cases resulting from the filtering, which allows any of the cases to be selected and added to a second list, which can map up to 15 cases. The third element is the classification matrix, where the evolution of the devices is shown. Visually, it is supported by a coloured line that has been assigned from a customisation list, the first model is identified by an arrow and a circular marker indicates each change of device.

The second block, resulting from the same selection and viewing criteria, displays the evolution of the device models of a trademark on a timeline. This can be compared to others, showing the coincidence, or not, in certain periods of time.

Figure 5.52. Historical chronogram evolution mapping interface

This section opens the application to a historical interpretation of the relationships we can establish between the trademarks, products, services
or ideas they represent, their positioning, their origin with the historical periods that mark the relationships between society, politics, economics, art, etc.

Trademark groups

Registering cases in the database allows the grouping of trademarks. This function is to contrast the relevance of visual expressions of brand architecture for an owner who possesses a group of trademarks and manages them strategically for different product groups.

This interface allows user to view the different trademarks that an owner possesses, and what models of the classification they are using. This information will be very useful for analysing and organising the brand architecture of an organisation. It will also enable an analysis of whether, in the same sector or relational context, organisations that manage many brands do so following one of the models described by different authors, such as masterbrand, endorsed or individual.

Mapping interface for visualize devices used by trademarks belonging to a same owner. Source: Own creation.

Figure 5.53. Trademarks belonging to a same owner mapping interface
Overview of the application

Below is an overview of the application and all its successive screens.

![Application design general overview](image)

Figure 5.54. Application design general overview

FOR PDF SCREEN VIEW, CHECK:

- FIGURE 5.55.
- FIGURE 5.56.
- FIGURE 5.57.
- FIGURE 5.58.
- FIGURE 5.59.
- FIGURE 5.60.
- FIGURE 5.61.
- FIGURE 5.62.
- FIGURE 5.63.
- FIGURE 5.64.
- FIGURE 5.65.
- FIGURE 5.66.
- FIGURE 5.67.
- FIGURE 5.68.
6. Conclusions

Nowadays, brands have achieved a substantial value in commercial, social and economic relationships, as they have the ability to confer an emotional and functional link between supply and demand. In order for this link to function, aesthetics play a very important role, since visual language is one of the ways in which this connection is created; it is constructed in a fractional, narrative-based manner, with help from different media to establish this dialogue. Because the visual communication process is fragmented, discontinuous and subject to interference, a hierarchy must be established in the message so that the audience recognises the brand, while continuing to confer a lexical and formal identification of the product or service likely to be compatible with their needs. In the process of creating a hierarchical visual order, trademarks play a fundamental role. A product or service is linked to a brand when it is signed; without a signature, an item is anonymous, and that is why trademarks become devices that generate symbolic and material value. They also accumulate a tangible value, as they can be registered as intellectual property, and remain legally protected. As it has to be perennial in nature, the signature must have an unambiguous formal structure, which over time must be reproduced in the same way. In order to consolidate a fixed image in people’s memory, a trademark is also subject to semantic and technical requirements that should facilitate this memory and ensure that the device is reproduced optimally under all circumstances. A look at the commercial landscape shows that trademarks are represented with devices expressed in many ways, by logotypes, symbols, shields, monograms, etc., with different formal composite structures on the one hand, and as I have argued, with clear aesthetic, visual, and verbal components on the other. Brand nomenclature is essential in the communication process between supply and demand. In order for the brand identity to be disseminated, it must be possible to name and subsequently publicise socially. Consequently, a trademark will always have a name and a form.

If I consider a trademark’s communicative value and social nature, this leads me to also consider its historical perspective, although I can say that trademarks are the result of a large-scale manufacturing and commercialisation model that originated from the Industrial Revolution, as well as from the need to protect the intellectual property of the
products that manufacturers put on sale in a new competitive environment. Previously, humans had already used brands for different purposes: to distinguish ownership of goods, determine the origin of merchandise, or to socially identify goods to individuals. These ancestral uses remain in the cultural heritage of contemporary society and today I can still find cases of organisations that use devices formalised in a very similar way, which shows that, given their virtues, to this day they still fulfil the function of identifying products, services, and ideas in an efficient way. It is important to consider that the literature I have reviewed, mostly with regards to the consumer culture, omitted in its analysis some activities or relationships, such as political management, public services, and non-profit organisations, among others. These, however, can be organised with the same communication schemes that I have mentioned and, consequently, everything established previously is also relevant to them. Accordingly, this leads to two issues: that trademarks are the result of the evolution of cultural, economic and social needs, and that their typological appraisal can have a significant effect on the specific relationship between verbal and visual signs.

This evolutionary nature has also caused the semantic field around brands to become a disordered repository of terms that define these devices by their differences and functions, with neologisms also incorporated by the parties involved in configuring their circumstantial reality. In analysing this uncertainty, this thesis has been able to organise a lexicon, to structure the semantic field in different meronimical relationships, and to argue for the validity of the term trademark as the main object of analysis of this work. Its meaning can be understood as a composition formed by a visual and/or verbal sign that visually represents a brand, must enable legal registration and which can be formalised with different aspects.

The definition of the semantic field is a primary goal behind the thesis, which is to generate knowledge in the domain of trademark design methodology. At this juncture, I can say that the agents involved in the strategy, management, and design of trademarks have different professional profiles, which oscillate between company managers, intermediaries who carry out strategic communication consulting tasks,
technical and industrial agents, and the graphic designers themselves, with the latter carrying out the task of designing the devices.

By reviewing its evolutionary nature, I can also see that, historically, the methodology applied to trademark design has been transformed from a technical to a theoretical approach, and from an amateur to a professional one. This has been the result of many factors related to innovations that have affected reproduction techniques, sales processes, economic circumstances, and even artistic, cultural, and social movements. I can add that at the professional level there is no type of regulation that establishes a standard of specialisation, which means it is still perceived socially as a different activity in its cost and quality, subject to mysterious inspiration with results arising under subjective conditions.

In this sense, and as I have analysed, the figure of the designer moves between two stances. One who effectively justifies inspiration, attending to the self-interest of becoming an author of creative renown and whose decisions, therefore, are above question. The other a designer who does not depend on style or inspiration as a main stance, but instead tries to establish a methodological parameter to create and justify the proposal, adapting to established orders and objectives. This thesis has focused on the second position, since it aims at providing knowledge that strengthens the links between that which is creative, with what is feasible and effective. This strengthening has to give the trademark designer better communication tools based on contrasting facts to explain and defend a design proposal. On the other hand, if the thesis achieves this objective it could open a line of research, as well as knowledge transfer, regarding a methodological approach to trademark design in educational and academic environments.

The study and analysis of academic trademark design literature has not proved to be conclusive in the interests of the thesis. There is a perception that this research has led to misunderstandings based on the qualitative and quantitative results obtained in the world of artificial situations far removed from the complex environments in which trademarks truly operate. On the other hand, a study of non-academic literature, related by designers themselves and by different authors specialising in the subject, although notorious in the 70’s, is highly
contextualised in the creative idiosyncrasy of each decade, and as such
denotes instability. In addition, there is little consensus, and it falls back
on generalist coincidences. However, these coincidences have set a
starting point to synthesise a first methodological approach, structured in
four phases based on four principles of suitability that most of the authors
agree on: that of adjusting to the meaning of the brand they represent, to
its visibility and relevance, to its functionality, and to its legal validity. Of
these four processes, the third and fourth show fewer contradictions,
since the results obtained are empirically measurable, while the first and
second are subject to more ambiguous interpretations. They are subject to
imagination; the development or modification of trademarks depends on
what is considered to be creative, a virtue that drives a designer to take a
series of compositional decisions combining form, typography and colour.
But the decisions that have a more or less innovative result are aligned
with a wealth of knowledge of the alternatives available for achieving the
goal of communicating an idea, a specific positioning, and ensuring that it
is interpreted properly. And at this point the thesis resolves to be involved
in a clarification of this methodological question: what are the creative
decisions that a designer has to take when managing or modifying a
trademark so it is able to transmit meaning, while fitting into specific
conventions, yet is also sufficiently innovative to become unique?
Attending to this point is also key in another aspect, enabling an
optimisation of the interlocution process with the people that commission
the work, liberating it from considerations based on personal tastes, and
directing it towards obtaining results that meet the objectives sought. At
the moment that I bring this methodological reflection together with the
typological idiosyncrasy that is perceived in the visual behaviour of
trademarks, I have verified how in some product and service sectors there
are patterns of visual behaviour that predetermine certain relationships
between the verbal and visual sign, perceiving a mimetic behaviour
presumably arising from different causes. Therefore, I have identified that
this methodological contribution requires knowledge of the environment
where the formal solution is to be situated, and to act according to a
categorised interpretation. On the dynamics of categorising the offer, it
should be mentioned that each of the products or services must be
contextualised within a group that covers an expectation, and may seem
easy to assimilate to its established conventions. However, with the
increase in competition the offer becomes more sophisticated, more
explicit, striving to become unique, and should always continue to compete through constant adjustments, whether in price, competitive advantages, etc. Consequently, the factors that the designer must take into account to understand a highly complex environment that functions according to some categorisation principles, which determine the perception of a message, must be considered holistically. This consideration fluctuates between four actors: the one who makes the offer, the offer itself, the one who the offer is aimed at, and the environment where this takes place. The increase in offers means this categorisation becomes a reference point for the audience, no longer just a question of distinctiveness, but also a matter of survival for the commercial structure. As designers, I believe that we cannot exclude these factors, and must offer sufficient alternatives in the solution of the project. The methodological approach I propose should allow me as a designer to argue for what I think is most appropriate for a categorised perception. However, it is the client that, depending on the level of risk they are prepared to assume, will have to define the solution as either leaning towards conservative or in the direction of more risk.

This reasoning has led to a research question that asks if, based on a theoretical-practical inquiry, we can establish a stable methodological procedure for trademark design that will help to make the formal results obtained more appropriate? Subsequently, in its later derivations, it was formulated from three key aspects. The first is if creative decision-making regarding the relationship between the visual and verbal sign can be integrated into the process of designing trademarks, in order to adjust the suitability of the resulting proposal. The second question derives from the first, considering that the relationship between these signs is finite since certain mimetic behaviours have been observed, I speculate if the relationships between the verbal and visual sign that constitute trademarks could be represented in a classification. This classification would enable limiting and interrelating the different typologies towards a third question, which would allow the parameterisation of the suitability of a certain typology according to the positioning of the brand it represents within a specific competitive environment. To deal with these questions, the practical nature of the research of this thesis has tried to develop, in a correlative way, and from an analytical and experimental perspective, each of these three aspects.
The first of these has tested the integration of a typological appraisal, in the methodological scheme drawn from the study of different authors, and applied to the design project for the trademark of the Universitat de Barcelona. An institution founded in 1450 and holding the highest ranking among Spanish universities, but which was represented by a trademark that did not have sufficient symbolic weight for what the institution was trying to communicate, and which, in addition, was inadequately functional in its systematisation and application. Once a detailed study had revealed the precise nature of the problem, as well as understanding the vision and positioning of the institution, the typological analysis in the creative process was integrated from two perspectives. One taking into account the devices the institution had used historically, which helped to reveal the nature of the problem with regards to both meaning and the application of the devices, and which had led to the change in design. While on the other hand, a typological analysis was integrated into the study of the competition, enabling to demonstrate that the university environment has a strong idiosyncratic emphasis on its visual behaviour, which responds to a culture established over the period of more than 500 years that this kind of institution has existed. One of the keys to a creative solution was to corroborate this perception with something tangible, and was aimed at formally studying the devices of the highest ranked universities in the bibliometric rankings, both internationally and nationally/locally. This study allowed me to view the percentage of coincidence in the notable mimetic visual expression of the devices, the type of relationship between the visual and verbal sign, the use of devices of historical character, and in the use of certain font styles, in the context of the cultural and historical connotations that the institution represented. The result of this analysis of the institution’s positioning, its history, existing problems with its identity devices, and how the sector in which it is located behaved, allowed me to write a design brief and apply the results towards establishing a framework of expressive suitability. This led to a series of formal decisions, such as what type of device would be best suited, what relationship between the visual and verbal sign would be most important, whether maintaining the use of the current typography would interfere, and how the architecture of the devices that represent the university and its departments should be structured.
Analysis and development of the four validation processes based on the four principles of trademark design has allowed a ratification of the graphic proposal, and responds to one of the motivations that this thesis raises, that of having a basis of theoretical reasoning for the formal decisions considered throughout the course of the project.

I can affirm that the practical research applied to the case study allowed the graphic proposal to be defended and the validation of integrating a typological appraisal of trademarks in the decision-making process of their design. In addition, it has led to methodologically founding a typological appraisal of the device as one of the creative decisions that the designer should take, and that can influence the adaptation of the design proposal according to a specific objective. I have called it the adjustment of appropriate meaning, a parameter that requires the designer to study the typification of identity devices that has been consolidated over time in a particular sector, thereby comprehending the conventions that are associated to it. This knowledge will allow the designer to know if the formal decisions taken are relevant to an organisation’s vision, positioning, audience and the sector in which it is situated. It is also evident that although in the university sector certain types of devices dominate, it may be that in other service or product sectors these will be others. In order to be able to typify existing devices in any project, I must adapt the possible combinations between the visual and verbal sign to a system that relates and delimits them. For that reason, a second research process is necessary, in order to stabilise a typological organisation of trademarks by means of a classification that considers all possible relationships. To develop a proposal for the classification of trademark typologies according to the relationships between the visual and verbal sign, it was primarily founded on the analysis and critical study of different classification trials carried out by various authors, evaluating the theoretical classification framework, assessing those considerations that might help the integration of a new model into a methodological design process. I also highlighted those considerations that, although they follow the logic of the approach that the author wishes to pursue, do not fit the methodological vocation that the new model is seeking. As a result of this analysis, I have tested a synthesis that brings together the vision of different authors with mine. This considers three natures in trademark genesis; the purest, which we
call the semiotic nature, is formed in a single isolated way with a single ingredient, by either a verbal or visual sign. A second nature, which we call designed, corresponds to those configurations that, in a planned way, combine the verbal and visual sign in different cadences. Finally, the classification establishes a third nature, a historical one, which corresponds to models from previous brand legacies, as well as to heraldic devices, seals, monograms, and signatures.

Once I established the theoretical classification model, I represented it graphically with a diagrammatic matrix that delimits each typology, as well as those spaces of confluence between them, serving as a basis for typological characterisation. In order to assess their ability to characterise any type of relationship between the verbal and visual sign, it was shown to work correctly in the collection and classification of 200 cases representing different product, service, and idea sectors. The classification proposal presented in the thesis not only responds to the research question, but also acquires an ontological character since it establishes typologies, on the one hand, based on the semiotic essence of relationships between the visual and verbal sign, and on the other, integrating on the same interpretative basis those models from a historical legacy of brands, also being able to identify the cadence between the verbal and visual sign. Furthermore, this proposal has some terminological implications, since it allows me to order and categorise the use of the terms in different strata, as established in the semantic field, as well as allowing me to simplify the way to name different expressions that a device adopts, and to reduce them. It shows that in the design process, the cadence between the verbal and visual sign will validate the correct expression of the device, regardless of whether it is a logotype, an icon, a shield, a seal, a monogram, etc.

It should also be noted that the study of classifications tested by different authors shows that these were terminologically confusing, and emphasise that they were locked in a taxonomic character alien to their practical utility. However, the most substantial feature revealed in the proposal expressed in the thesis, is that it incorporates a classification matrix, which is not only apt for accommodating any relationship between the verbal and visual sign with which trademarks are configured, but also serves as a tool to visualise the presence of certain typologies according to previously defined sample collection parameters. When I
think about the process followed in the case of the *Universitat de Barcelona*, the use of this matrix would have greatly facilitated the analysis and visualisation of the typological behaviour of the trademarks competing in the sector. It is in this thought that the potential of the concepts analysed so far give way to the transformation of this matrix into a public consultation tool, where all the cases of a particular sector have been previously characterised, with the activation of some inquiry parameters, allowing the visualisation of the relationships of trademark suitability, according to positioning, the sector where the trademark is situated, the type of receiver and the type of transaction.

To do this, a web application configured with a database and a mapping engine has been designed. Taking the classification that I have proposed as a theoretical basis, I have defined a system for the characterisation of trademark cases that are recorded in the database. This has been designed and organised as an interface that not only allows the typological characterisation of the ingredients that formally comprise it – colour and typography – but also allows for characterising attributes that define the relationships within the four frameworks of relationship in which a trademark communicates; be it with the type of target audience, within the environmental context where it comes into contact with the public, or with any cultural idiosyncrasy defined by the owner of the trademark.

The same interface allows the selection or combination of the information compiled from the four relationship frameworks, and using the classification matrix, runs a mapping engine that allows user to view, from different perspectives, the coincidence of formal features of the trademarks. The six viewing perspectives offered by the application are: the types of devices; colours; most used fonts; all samples corresponding to the selection made; the relationships established specifically between the models and the fonts and colours used; relationship archetypes between typography and colour models that are predominant over others; the historical evolution of the devices that belong to the selection; and finally, the behaviour of those groups of trademarks that belong to the same owner.

The application shows itself to be a powerful search tool that sublimates the theoretical considerations presented, which is useful for decision-making in the design process, and establishes a framework of
reference and suitability for the area of competition where the future trademark must compete.

The main contribution of the thesis lies in the resolution of the research question posed in the first chapter and in the derivations proposed in the second, which were refinements resulting from the analysis and reflection on the literature consulted. Therefore, I consider that the thesis, based on theoretical-practical research, establishes a stable methodological procedure for trademark design, which not only focuses on ensuring functional capabilities, but also appropriateness. However, this contribution can be considered from three viewpoints, the first focusing not so much on questioning the positions of different authors, but rather on finding, grouping and organising the coincidences among them. Contributions that, for the most part, express the functional requirements the design process of a trademark must meet. This synthesis (Figure 5.1) contributes to the orderly configuration of a method, from a systematic logic of continuous processes that are interrelated. To analyse my contribution, it should be noted that the main parameters defined by the authors studied (see figures 2.1.a. and 2.1.b.) are limited to specific non-interconnected considerations, which are designated in different ways: practical requirements, parameters of execution, brand identity ideals, essential criteria, design tips and even, as Shumate (2015) calls them, deadly sins. The common feature I have observed is that they are all isolated from a process that links some decisions with others. Conversely, the contribution offered by the thesis does not only order and link them, but also subordinates them to a condition of appropriateness or belonging. A condition of belonging extracted from authors, such as Chermayeff & Geismar (2000, p.8), Chaves and Bellucia (2003) and Wheeler (2006, p.20), who, from my perspective, is more committed, departing from a reflection parallel to the function. These authors establish the idea that all creative decisions must be integrated into a design process, the results of which should be compatible with a determined strategic positioning. This aspect has been integrated into the methodological process, which not only seeks to homologate the functional and legal capacities of the trademark, but also opens up the way for an analysis of whether the trademark is appropriate for its function and positioning. Looking more deeply at this question, the methodological proposal incorporates an aspect that only Chaves and Bellucia (2003) take into account, which is the
study of typological suitability for the category where the offer will be placed.

This question connects with the second contribution, since it represents a theoretical approach that links the will of an organisation to be perceived in a certain way with the adherence to conventions previously assimilated by its audience. To identify these conventions, the methodological process integrates the mapping of the category as an essential part, where the designer should find out whether there is an archetypal or idiosyncratic visual expression in the identity devices of a particular sector. In other words, I have been able to approximate what conventional relationships between the verbal and visual sign, and therefore the types, we can establish between a desired positioning and an aesthetic interpretation of that positioning. Once the typological consideration is set from a theoretical perspective, I have added the consideration of colour and typography as modular values of the visual and verbal sign.

The third contribution, which is the result of the previous two, determines the relationship between the verbal and visual sign, considering the historical analysis developed in the second chapter, incorporating an extensive study of the different proposals for trademark classification presented by different authors. From this study, it is observed that the classification proposals so far, as a whole, are very diverse. They use a heterodox terminology, which coincides in few cases, and are mainly based on phenomenological observations. The thesis has contributed to formulating a classification that not only contemplates the analysis of trademarks as existing phenomena, but also integrates both the visual expressiveness of the devices that originate in the designer’s own expressive freedom, and those devices that display a pre-configuration belonging to the historical cultural evolution of identity devices. To accommodate any type of device, the proposal is structured with the new idea of a typological construction from ingredients comprising visual and verbal signs. A typological articulation of trademarks, grounded in such a way that identity devices can be fragmented into specific components, establishing constituent parts understood as kind of fundamental particles. These particles, considered as ingredients released from their semantics, allow us to anticipate conventions associated with their combination. That means that
regardless of the symbology that the forms denote, their configuration will acquire a character with a certain significance.

Considering these conventions facilitates decision-making regarding what type of device is most appropriate for the positioning of an organisation. For the designer, this has certain implications; specifically three: the first is that it facilitates the creative development of the task, as it identifies types of colours and typography, associating creative decisions with them. The second empowers designers by showing them the perceptive implications their proposal will obtain, and to what degree it will be adjusting to conventions or deliberately moving away from them. The third allows designers to consolidate a theoretical position in front of their client, enabling them to reason about creative decisions with a theoretical support that sustains their position. The implications alien to designers are also considerable, as studying trademarks from a typological perspective can contribute significantly in academic disciplines other than graphic design. Discovering an archetypal expression in a certain commercial, social, political or cultural environment may allow theories to be formulated that relate the form to its meaning.

There is a clear question, which this thesis has tried to defend: that which defines the visual identity of an entity must be consistent with what its target expects as a counterpart in the relationship. To address this, the thesis offers the possibility of considering trademarks from a new perspective in their typological appraisal, as well as how this typology is conventional in its use. Hence, I can say that the theoretical framework of the thesis, in essence, provides a contribution that the literature consulted has not addressed; a new approach that helps the designer understand trademarks as devices that are formally expressed in different ways, and that each way can influence the perception of these devices. It helps to reach an understanding of these devices and consequently the disciplines that surround their creation, from brand strategy, to trademark design, and legal registration. The mapping engine as a practical contribution, affords the designer a way to view and analyse the possible connotations of relevance of a certain positioning, and to defend creative decisions.

Both the proposed classification of trademarks and the mapping engine can help in the process of designing trademarks. This will be achieved by helping graphic designers to reaffirm their methodological process and use these contributions to facilitate a dialogue with the client
based on theoretical foundations. They can help to find out if the mimetic behaviour of a particular group of trademarks is conditioned by a simple trend or because it responds to the needs of the sector. From the creative point of view, the choice of a particular font style will affect not only the perception of the brand, but the work of the designer, since a combined model, for example, allows variations, whereas a closed model always depends on a set proportion affecting its systematisation.

Thus, the aim is not to automate the designer’s task, but rather to provide a tool to analyse the information and draw a focused conclusion about what is relevant, detecting what is counterproductive, and setting some risk parameters when it comes to orienting a proposal aligned with a pre-existing dynamic, or consciously breaking with it.

This risk is more transcendent when it comes to incorporating a new reality into a visual space where other offers already exist, or where it is necessary to create a reality that until now did not exist. On the one hand, it frees the designer from any formal baggage so he or she can create "from scratch". But on the other hand, the organisation must initiate a process of getting to know an unknown reality, which will be much more complex when the offer intends to replace other products that the consumer is already familiar with. This is the time when it is most important to consider existing conventions, so that the offer is recognised as a member of a group of its competition.

One of the limitations found in the thesis arises from the concept of concurrence, since it has not been possible to develop further a classification system for products, services and ideas. Despite using the Nice classification of products and services, from the World Intellectual Property Organisation, enabling cases to be registered according to an internationally endorsed regulatory system, I believe its validity is restricted to users who work in a legal environment of trademark registration. One of the tasks that this limitation supposes is to expand on fixing taxonomic standards, academically defensible, that classify products, services and ideas. In particular, the different aspects determined by the four environments in which the brand communicates: who makes the offer, who it is aimed at, what characteristics make it different and in what place the transaction takes place. One factor that complicates this further development is that categories are never entirely
closed, because the dynamics of technological and commercial innovation constantly motivate the generation of new fields of competition.

Although the genesis that motivated this thesis was to solve a problem that affected designers, the mapping engine and its theoretical substrate can also be considered, since the display engine is open access, an aid for researchers and organisations to understand the links between strategies and expressions, offering an improvement in the empirical studies of the brands. Analysing the visual behaviour of trademarks allows to observe the superior vertex of the hierarchy of visual identity elements that configure communication language, thereby establishing a set of perceptions that positions an organisation with respect to others. It also provides a view of whether the strategic management of a brand that is situated in one or more categories visually expresses it in a way appropriate to its positioning. It can demonstrate the saturation of a particular form of expression in a sector, and illuminate opportunities for expression by understanding that they are positioned in a certain way that differentiates them from others. In can also help the dynamics of acquisitions, mergers, and joint ventures that organisations are involved in, taking into account that these do not only cause administrative changes, a change in the client portfolio, or a change in the positioning of a corporation, but also in what way the trademark that represents and identifies a product or service integrates into another group, contaminating or enriching its portfolio of trademarks. The linear or hierarchical arrangement of this set is what we know as brand architecture organisation. In this sense, the mapping engine offers a tool that allows users to analyse the relevance of decisions that are made about strategic management. Also, in internationalisation processes of organisations, it can help to examine whether the brand behaves differently globally than locally, and which implications of certain cultural roots can be removed.

The mapping engine is valuable in its didactic dimension. Being an application in which eminently visual results are obtained, and as it is planned to be open access, accessible to anyone wherever they are, allows me to contemplate the possibility that it will be used very effectively in the generation and transmission of knowledge in educational environments for graphic design, advertising, public relations and
business management. In my activity as a professor of visual brand identity design, and as a motivator of the thesis, I sense a broad application of a syllabus around the mapping engine, so that the student understands and can see the different perspectives to be considered to design appropriate trademarks. Also in the teaching of the other disciplines mentioned above, it seems apt to convey that trademarks hold the highest hierarchy in the complex relationships established by branding and the corporate communication of organisations. Also from an academic point of view, it should be allowed to progress so as to generate other phases of the methodological process of trademark creation, as it facilitates creative processes, and from a terminological point of view solidifies the semantic field of the discipline. There is also potential in market research applied to trademarks, in any of the environments that the database parameterises and that may affect trademark design, including gender, age, geographic origin, sales environments, purchasing power, etc.

Among the virtues that can be derived from this research work, it is applicable in a historical dimension of graphic design, as it allows the study of how brands have evolved over time; opening a window to analysing the reasons for their formal changes. Being able to compare certain theories about the relationship of social, political and economic changes with art movements and their impact on society, and consequently to found, on a theoretical level, the reasons for the formal expressiveness of symbols in industry, commerce, and even validating their territorial impact. This dimension of the mapping engine’s applicability can also allow the multidisciplinary study of disciplines other than graphic design. For example, relating trademark design to the economy, sociology, sociological studies, economics or politics. The great changes that led to the fall of the Berlin Wall, at the political, economic and social level, with the incorporation of a large geographical area into the capitalist system, had an impact on trademarks. The past has generated a culture of its own in the way it is represented. On the other hand, there is the growth of Southeast Asian economies that came from a communist culture where consumption was not considered as a growth factor. What happens when a consumer culture is generated from nothing in a little less than twenty years? Do trademarks imitate western patterns, like the aesthetics of the products being marketed, or does a cultural
heritage remain that makes them different? Regarding these patterns, such as in countries where the impact of Western consumption culture has not been fully implemented, how do communication models for products and services work, and to what extent, while not being immersed but still influenced by it, some reference features are perceived? And in relation to this, it may also be interesting to observe in Asian, African or Latin American countries, where non-Latin scriptures are used, or where they have a very peculiar visual culture, how this influences the formalisation of trademarks. Emphasizing certain underlying problems in today's society can also be one of the uses of this research. In gender studies, it should be possible to perceive whether the use of certain colours or typography enhance the role of gender in the formalisation of trademarks. It can respond to which sectors of consumption are more susceptible to this problem; and if trademarks distil certain conventions, and determine if there is a possibility to neutralise this bias. Also, how this issue can affect trademarks that represent products and services intended for a young audience, and not only if they promote male chauvinism, but also if they incite violence, or other sensitive topics for a more vulnerable public.

As mentioned in the introduction of the thesis, the limits of visual languages have become blurred today between organisations that have commercial interests and those that apparently do not. That is why the application proposed in the work can also open an analysis within specific fields, such as theology, politics and leisure. Whether they are religious congregations, institutions, political parties or movements, non-profit organisations, etc. The mapping engine can clarify to what extent they have adapted to the visual culture and the new communication dynamics, constructing their story with the help of an aesthetic strategy based on certain cultural conventions, building a hierarchy of language that brings them closer to their interest groups, and to what extent it is similar to that used by commercial products and services.

The results of the thesis can be applicable to artificial intelligence processes. On the one hand, providing a key element in image recognition algorithms applied to trademarks. Since the proposal for trademark classification provides an ontological basis for a system of related concepts necessary for machine learning, which operates from tutored
learning based on comparing examples. And, on the other hand, the ability to recognise trademarks that have an algorithm, with the information that the database will contain once it is complete, and since these act as the highest hierarchical visual expression of an organisation, it can serve to monitor the visual communication of organisations in digital environments. Allowing to identify the characteristics of the sender of the message, and if it is sent with commercial, political or religious interests, or even some other interests. From the very beginning we understand that it can be useful in artificial intelligence processes applied to creativity. Adobe, Google, IBM, Microsoft and others are immersed in the research of computational creativity processes, most of which are found in programmes to be used by creators where software acts as a creative collaborator and not just a simple tool. The engine can help some of these programmes, as they carry out searches of large amounts of content, which can be analysed in depth in terms of their aesthetic attributes. If we add to this approach the initial consideration we expressed at the beginning of the research work, and an exponential growth of the world trademark registry, it will open up another application. Specifically, considering typological classification as a variable to help code trademark registration. Also, a possible derivation of the research is to connect this mapping engine, the artificial intelligence processes described above, to the Global Brand Database, so that it can be retro-fed all the information contained in this registry repository, and the possibilities offered by the mapping of the parameters that characterise them. In addition, allowing the designer to be tutored in the legal suitability of the proposal being developed.

Despite the apparent potential of the application, it is clear that its future will always be subject to its effective implementation. The first stage that must be overcome to accomplish this is purely pragmatic, proceeding with a technical development that follows the specifications expressed in the thesis, while ensuring adequate programming sufficiently capable of accumulating a certain amount of information, which it is able to process and transmit online. The second issue to consider in order to be effective is that the database contains enough cases for it to be considered relevant. Within this aspect it is necessary to indicate three more questions. One that affects amending one of the limitations identified previously, that requires an investment in the setting of a parameter
categorisation for defining the four trademark relationship environments as well as for categorising products, services and ideas in order to stabilise a more consolidated prospecting process. In this respect, an academic approach would be necessary, and must be sufficiently skilled, as supply is unlimited and therefore any new product, service, or idea can occupy a space in the mind of its target audience at any time. The second requires determining how many cases are needed in each sector or activity in order to validate the results obtained. Lastly, the third revolves around who should develop the task of inserting cases and what protocols should be used to carry this out. This sets out to initiate a process of dissemination of the thesis in order to find economic funds and possible partners that may be interested in developing this work, such as other university centres, research groups or researchers.
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