Managing the Brand-Product Continuum in Global Markets

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Abstract

This paper outlines a framework for managing global branding – the policy of establishing globally consistent brand names, identities and positions. The basis of this framework is a disaggregation of the branded product offer into a hierarchy of attributes, ranging from tangible product attributes to intangible brand ones. It is argued that decisions regarding international standardization can be made at any level on this continuum, and taxonomy of global brand strategies is thus derived. By separating brand from product, this contingency approach aims to highlight possible ways in which brand owners in international corporations can address the trade-off between global integration and local responsiveness. Illustrative examples are taken from the European detergents and cleaners category.
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Background

The vision of globalized markets articulated so powerfully by Levitt thirty years ago was not a consumer-driven one. Globalization is clearly defined as a 'push' rather than a 'pull' process[3], driven by technology, with competition at the firm level centered on the pursuit of

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[3] We borrow this distinction from marketing management. When each player in the supply chain is directing marketing efforts at the immediate customer at next level, rather than at the end consumer, demand is ‚pushed'

economies of scale. Consumers are described as the beneficiaries rather than the instigators of globalization, their compliance assumed on the grounds that they will accept superior product propositions, in line with microeconomic models of utility maximization in decision making.

> "A powerful new force now drives the world towards a single converging commonality, and that force is technology…The result is a new commercial reality – the emergence of global markets for ***standardized consumer products*** on a previously unimagined scale of magnitude. Corporations geared to this new reality benefit from enormous ***economies of scale*** in production, distribution, marketing and management. By translating these benefits into ***reduced world prices***, they can decimate competitors that still live in the disabling grip of old assumptions about how the world works. Gone are accustomed differences in national or regional preference…Ancient differences in national tastes or modes of doing business disappear. The ***commonality of preferences*** leads inescapably to the standardization of products, manufacturing, and the institutions of trade and commerce."

(our italics added)

In the ongoing debate provoked by Levitt's paper, opponents of his views have consistently argued that his vision of global markets ignored what might be described as marketing fundamentals. Douglas and Wind, for example, contended that:

> "it implies a product orientation, and a product-driven strategy, rather than a strategy grounded in a systematic analysis of customer behavior and response patterns and market characteristics" [4]

In 2003, the focus of the debate on market globalization has shifted from product standardization to brand standardization. This is important because it turns Levitt's vision upside down. While the corporations that own and develop product technology have indeed pursued technological convergence in the way he envisioned, this has not proved to be a sufficient condition for the globalization of markets. Rather, many now view consumer acceptance, or lack of it, as the bottleneck in this change process. Cause and effect are thus reversed, in that consumer pull is posited as the necessary condition for globalization, and only when that condition is satisfied will standardized product offerings find a market. According to one recent commentator writing in the *Financial Times*, consumers are actually moving in the opposite direction, their fragmenting tastes provoking a "backlash" against global and particularly American brands, leading to the conclusion that Theodore Levitt's thesis was just plain wrong." [5]

This position is adopted not only by business commentators and academics arguing from a 'marketing fundamentals' perspective, but has been pushed onto a wider political stage by the anti-globalization movement that emerged in the 1990s. The focus is on brand because this is seen as the vehicle through which consumer pull will be expressed. As marketing academia

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down through the chain and sales follows from availability. When marketing effort is directed instead at the end consumer, demand is ‚pulled' back up through the demand chain by consumer preference.

[4] Susan P. Douglas and Yoram Wind, "The Myth of Globalization", *Columbia Journal of World Business*, Winter 1987, pp. 19-28.

[5] Richard Tomkins, „As Hostility Towards America Grows, will the World Lose its Appetite for Coca-Cola, McDonald's and Nike?", *Financial Times*¸March 19, 2003, p.19.

has come to recognize in the last thirty years, consumers have a more complex relationship with the products they buy than the utility maximization paradigm that Levitt seems to assume, and to varying extents they are expressing themselves through their brand choices [6]. In other words, a global market for standardized products is only possible in a world of standardized consumers. For those opposed to brand globalization, therefore, it is the values and culture of individuals, regions and countries that would have to make way for standardized offerings:

> "McWorld is a product of popular culture driven by expansionist commerce. Its template is American, its form style. Its goods are as much about images as matériel, an aesthetic as well as a product line….There is no activity more intrinsically globalizing than trade, no ideology less interested in nations than capitalism, no challenge to frontiers more audacious than the market..(Multinational companies') customers are not citizens of a particular nation or members of a parochial clan: they belong to the universal tribe of consumers defined by needs and wants that are ubiquitous, if not by nature then by the cunning of advertising. A consumer is a consumer is a consumer…Modern transnational corporations in quest of global markets cannot really comprehend "foreign policy" because the word foreign has no meaning to the ambitious global businessperson…they do not find foreign countries foreign: as far as production and consumption are concerned, there is only one world and it is McWorld" [7]

To the anti-globalization lobby, the perceived unfolding of Levitt's doomsday scenario is a prime motivation for opposition to the spread of brands across the globe. To brand marketing executives within multinational companies, however, it is the resilience of local variations in taste that dominates their decision making, representing an ongoing challenge to any attempt to reap global economies of scale and control in marketing. Indeed, many multinationals, in consumer markets in particular, are adding local brands to their portfolio as eagerly as they are investing in global "power brands". But nevertheless, there is a sea change occurring in this field two or more decades after Levitt made his bold predictions, although it is not driven by technology in the manner he forecast. Instead, internationalization at the intermediate level in the market system, especially in retail distribution and also in media, is offering the prospect of a future global distribution system in which brand owners are pulled towards global branding strategies by their customers (as opposed to their retailers). This only exacerbates the underlying dilemma, however – if consumer tastes remain variable around the world, does a global branding policy risk alienating the company's brands from its customer base? This is the core challenge of international marketing – companies are growing more global in their presence and their degree of integration, but consumers retain varying levels of local orientation in their tastes and demands.

Part I: Definition of a "Branded Product"

The question of whether or not an international company should pursue a policy of global branding – whether it should seek globally consistent brand names, identities and positions –

[6] See for example the work of Holt and Fournier at Harvard Business School.
[7] Benjamin Barber, *Jihad vs. McWorld: How Globalism and Tribalism are Reshaping the World*.

encapsulates perfectly the core dilemma of international marketing. On the one hand, brands work because of their consistency and omnipresence, offering customers a short cut in the purchase decision by a promise of reliability and familiarity. Standardization is therefore at the heart of branding, and consistency in execution a keystome of effective brand management. It is also true, of course, that it is more efficient for companies to manage a single brand worldwide than a portfolio of different brands, both in terms of economies in marketing expenditure, and also in terms of managerial control and accountability. These two factors suggest that brands should seek wide presence and a uniform identity on a global scale.

On the other hand, it is also true that brands work because of the resonance of meaning and identity they offer to customers at a deep, sometimes emotional or subconscious, level. Indeed, many trends in the wider field of marketing are enabling marketing companies to get ever closer to their customers, and even in some cases customize their offering or messages to individuals. Rare is the company for whom a central element of marketing strategy in the 21st century is not to get closer to customers and build a database of individual customer identities. Until people are the same around the globe, therefore, we might expect brands to succeed when they reflect local and even individual taste and culture.

Increasingly, thinking on international marketing is moving away from the “either/or” approach (i.e. either global or local) towards what might be termed a “both/and” approach (i.e. seeking to capture the benefits both of global integration and local responsiveness). In managing brands internationally, such a contingency framework, and the managerial flexibility that flows from it, can be enhanced by disaggregating an offer into the brand and product offerings. Our approach is based on the concept of a “Branded Product”, i.e. we clearly differentiate between the functional contributions of a product and the more emotional persuasive elements of a brand. This differentiation is key to our understanding of the global branding issue.

Products

Products come to life in the manufacturer’s lab – they are faceless aggregates of mechanics, chemicals, and basically all conceivable tangibles in order to perform in a certain way that is more or less required or appreciated by their users. In terms of the detergents category, the main field we reference in this paper, products are a combination of mechanics, chemicals, and other tangible factors such as fragrance and color, mixed to perform in a certain way that is more or less required or appreciated by their users. Their characteristics can be altered deliberately by their producer. The product is owned entirely by the producer

Brands

Brands come to life in the consumers’ minds – they are meaningful aggregates of associations, meaning, perceptions and all other intangibles. Brands have a “face” that helps them to be recognized by a person who then immediately associates certain characteristics with this person-like entity. Brands as intangibles are thus owned jointly by the producer and the user – a change on the one side does not necessarily entail that the change is also followed on the other side. Consumers in fact elaborate on what they know and feel about brands – actively modifying and changing the designated set of associations that consumer have in mind regarding their brand. If the consumer chooses to ignore that the brand personality has changed in order to maintain his cognitive consistency, all efforts on the manufacturer’s side might be in vain.

Now we simply combine these two elements to define the "*Branded Product*" – thus clearly emphasizing that the brand part is only one component and should not be mistaken to also comprise the product part.

Why not simply call it a "Brand"? We believe that the classical notion of a "Brand" included an inseparable combination of a product base and a brand frame around it. Thus, the base of the offer was a functional product with the brand added on as a presentational enhancement. In fact, the two can be managed quite separately. "Coca Cola" is a good example – originally exported widely in its original American formulation, it has now evolved to the point where its ingredient mix is adjusted by region to cater to differences in taste in areas such as sweetness, while the (largely American) brand attributes have remained unaltered for the most part. As a "Branded Product" approach, it can be managed following this 'Regional Adaptation' strategy (see below).

The "Branded Product"

The "Branded Product" is viewed as a array of so-called "persuasive elements" which in total make up the value proposition to the consumer. A persuasive element is simply any element that contributes to the total value perception from the consumer's point of view. In the whole range between tangible and intangible assets we can conceive quite a lot of persuasive elements. For detergent e.g. the amount and the characteristics of cleaning agents like tensides will obviously matter, the colour of the powder and its speckles, whether it's a powder or a liquid detergent, what brand it is and who is the producer. The elements, however, need to be carefully orchestrated to create a consistent offer to the consumer. The Brand plays a major role here – it helps to provide an overall frame of reference for the multitude of sensory perceptions and mental elaborations that are taking place when a contact with a branded product is established.

Fig. 1 schematically describes the Branded Offer as a hierarchical set of related persuasive elements. From "real" bottom (chemical ingredients) to "virtual" top (corporate endorser) we find a carefully tuned architecture that seeks to provide psychological synapses between the various parts (e.g. capitalizing on the consumer insight that a fine fabric detergent should have rose-coloured speckles in it). The more of these connecting synapses between the different value layers of the Branded Offer, the better.

Fig. 1:
Hierarchy of Persuasive Elements of the Branded Product (Detergent Example).

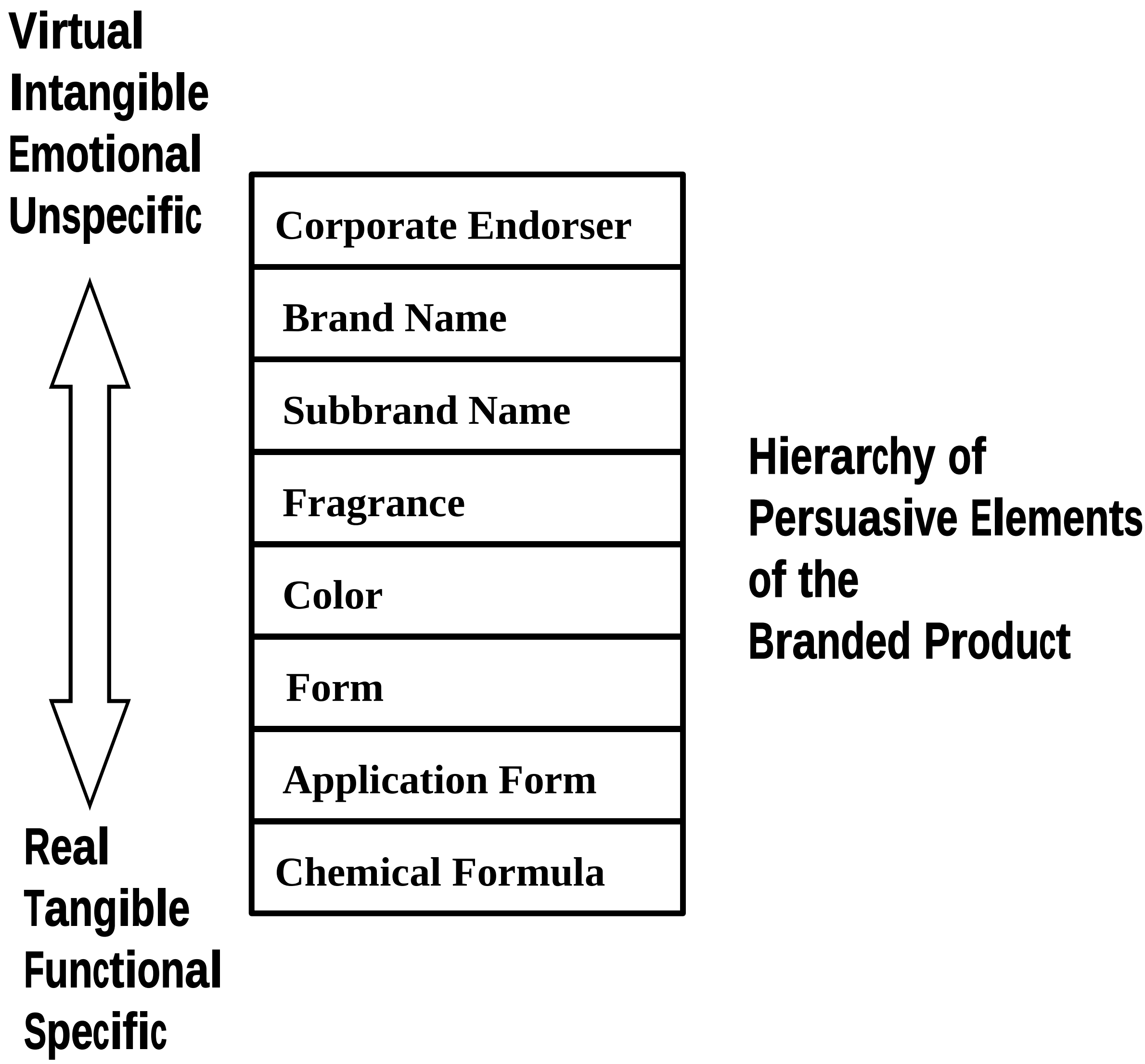


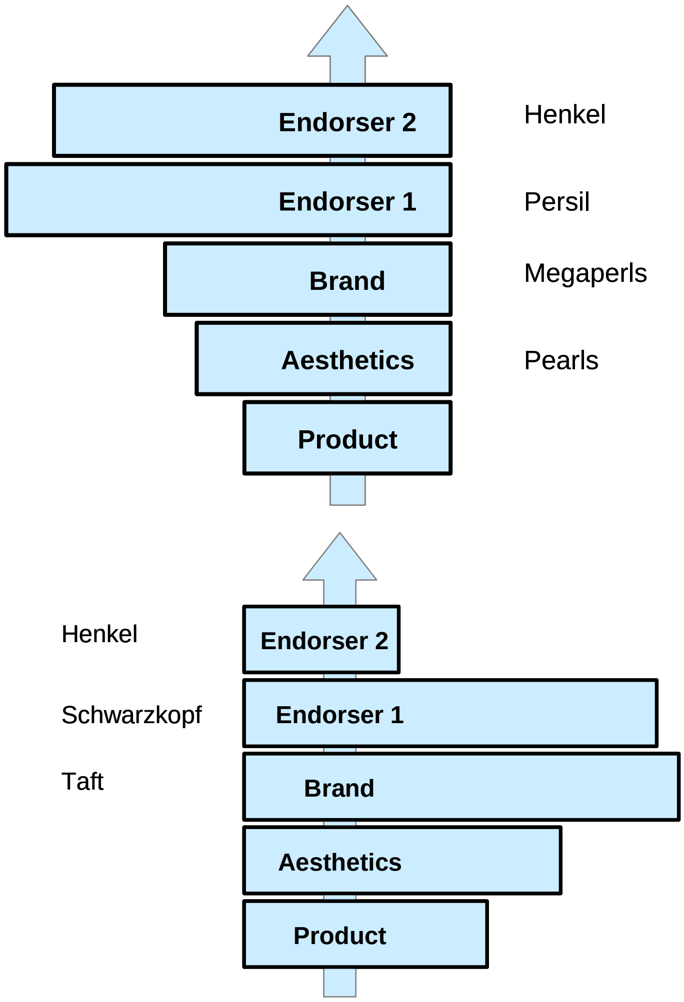
Fig. 1 stands for a hypothetical hierarchy for a detergent brand. Here besides the characteristics of the chemical formula (e.g. more aimed at stain removal or more aimed at fibre protection) other persuasive elements matter to consumers. The application form e.g. (i.e. powder, liquid, tablet, pouch, pearls etc.) provides clear signals to generate implicit expectations about the product performance spectrum and its quality. Other aesthetics like form, color and fragrance do the same – fragrance is already "on the edge" to more emotional and intangible persuasive elements.

Our concept entails that the Branded Offer is owned jointly by the producer and the consumer - the more we move to the intangible parts of the hierarchy. The more we move to the virtual top of the hierarchy the more we must be aware that these parts are not in the package or on the shelf, but resides in the mind of the consumer who actively changes or maintains her/ his idea about the total value concept of a Branded Product. The producer may choose to exchange, add or remove parts of the lower end of the hierarchy without even asking the consumer, changing parts of the jointly owned modules aginst the consumers' consent represents a cruel violation of the common character of the Branded Offer.

The producer and the consumer should have the same mental representations regarding particularly the virtual top elements of hierarchy of persuasive elements. Corporations spend huge amounts of money on image studies or e.g. associative maps in order to really understand how their communication efforts influence consumers' mental models about the Branded Offer (particularly its Brand part). Understanding the Brand in its functions as a psychological carrier system is of vital importance. The worst thing that may occur is a severe discrepancy between the mental models on the corporate and on the consumer side.

The example in fig. 2 refers to the perception of the corporate endorser Henkel for two major Henkel brands in Germany, the detergent brand "Persil" and the hair styling brand "Taft. Although both under the Henkel roof, the persuasive contribution of the overall Henkel endorser is very different.

Fig 2:
Different Roles of the Corporate Endorser "Henkel" for Two Major Henkel Brands in Germany (Source: Henkel Corporate Image Study, 2003, internal document)



While "Persil" as the mother brand of a big detergent brand family benefits considerably from the overall Henkel endorser, the situation looks very different for "Taft". Henkel plays only a minor role in the "Branded Product" Hierarchy of "Taft". What really matters for consumers besides the brand itself, is the persuasive contribution of "Schwarzkopf", a Henkel Cosmetics company in Germany. So the consumer actively modifies "Branded Product" hierarchies and places emphasis on different layers than the corporation.

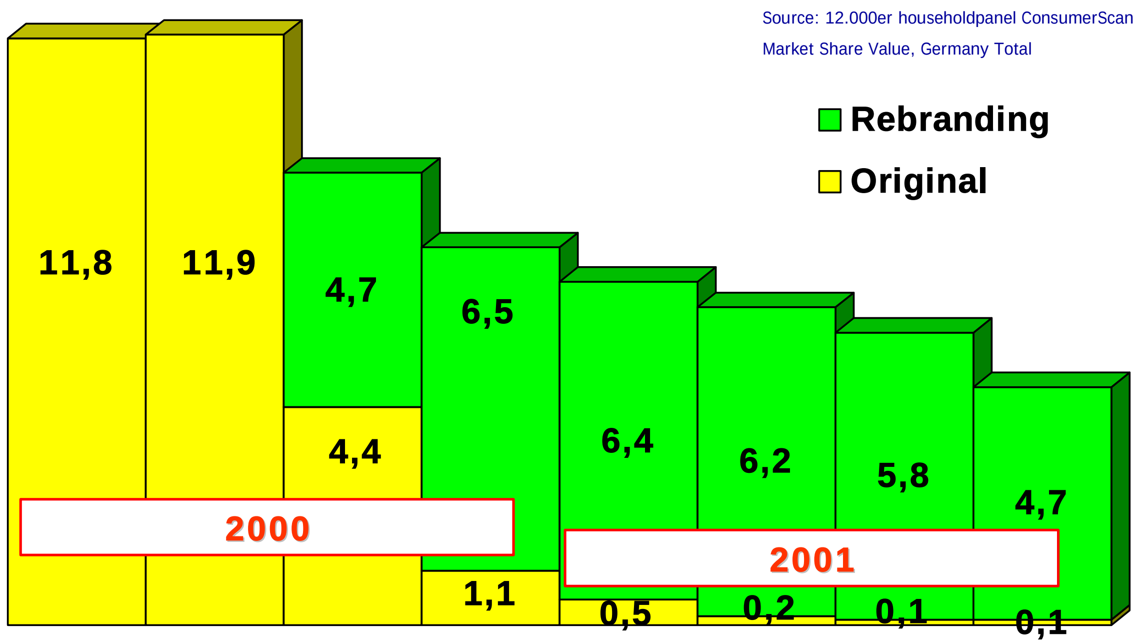
If we now extrapolate from the situation in one country, we must conclude that different "Branded Product" hierarchies can result in different geographies. While Heineken ist one of the premium imported beers in the U.S., it is a mainstream brand in The Netherlands, and almost not visible in Germany.

One of the key preconditions for Global Branding is to actively research the "Branded Product" representations from the consumers' point of view and take branding decisions based on the perception in consumers' minds.

An example: The "Fairy" Tale[8]

In order to illustrate our thoughts with a real example we have chosen the case of a dish-washing detergent in Germany. The brand "Fairy" was supported strongly by Procter & Gamble (P&G) for years and gained a healthy market share around 12%.

Fig 3:
"Fairy" Value Market Shares in Quarterly Periods 2000-2001,
Source: GfK ConsumerScan, Germany Total



In the second half of 2000 the brand was renamed "Dawn", P&G's international dishwashing brand. As far as we know, there was no basic change in the product itself, the only change was regarding the Brand part of the Branded Product "Fairy". Although the brand switch was backed up by huge media investments to inform the consumer that "Fairy" is now "Dawn" (see below), the market share losses were striking (see Fig. 3): until the end of 2001 the "Dawn" market share fell to less than half of the "Fairy" share at the beginning of 2000. Not counting the media costs, we roughly estimate the loss in turnover for 2001 at around DM 16 Mio (about 8 Mio $). Similar statements can be made about the P&G attempt to use its international brand name "Bold" for their Austrian detergent brand "Dash". Recently, both brands have been renamed to their original brand names "Fairy" and "Dash".

[8] We wish to thank Dr. Raimund Wildner from the Gesellschaft fuer Konsumforschung (GfK) for this example.

What had happened? The Branded Product thinking may provide an easy and straightforward explanation. Obviously “Fairy” represented a known and trusted brand personality with its consumer franchise in Germany; the virtual entity “Fairy” had become an essential persuasive element on the consumer side, particularly with its users. Then the producer decided to withdraw this persuasive element for a chemical product in a one-sided manner. The consumer reaction was clear and quick: although the product remained entirely the same, its consumers decided to turn their back on it, the psychological bond in the form of the brand was broken, the unspoken agreement symbolized by the brand was violated and obviously could not be restored – even after P&G reinstalled the old “Fairy” name.

Interestingly, the rebranding of “Fairy” into “Dawn” did not take place in the United Kingdom where the dishwashing detergent “Fairy” has a long history in the market – however, with a main benefit that is not focused on grease-cutting. Obviously it was believed that the brand name could be changed easily (like in Germany) when the underlying product proposition is fairly similar (i.e. “cuts grease”).

Part II: “Market Penetration” or “Economies of Scale” – A Corporate Dilemma

Marketing managers are confronted with an everlasting dilemma: on the one side they are forced to deeply penetrate their market down to its last consumer at all costs, on the other side they are required to cut costs (again at all costs) particularly by selling the same product to every consumer. It is commonly believed that the latter leads to considerable economies of scale. Thus Levitt’s (1983) message was gladly received. Everyone was ready to believe that the world soon is a “Global Village” and that consumers are the same everywhere. A “world” product under a “world” brand would create huge economies of scale, and penetration would be no issue anymore since everyone is believed to be alike anyhow.

As the “Fairy” example has shown, the only flaw in this “make and sell” ideology was the consumer herself. Our experiences in the European detergents and toiletries markets lead to three basic conclusions:

(1) A <u>brand</u> is not the same brand everywhere (in consumers’ minds).
(2) A <u>product</u> ist not the same product everywhere.
(3) A <u>consumer</u> is not the same consumer everywhere.

Taking these three statements for granted, the foundations of a classic Global Branding approach (i.e. same product under identical brand name everywhere) quickly fall apart: the classic assumptions have not materialized to the present day - i.e. that the global consumer needs, desires, attitudes etc. would rapidly merge and be satisfied by identical products put to market under identical brand labels.

Using the language of the “Branded Product” thinking – the hierarchy of persuasive elements and their relative weight sharply diverged between the people in the boardroom putting products on imaginary shelves and the people in the supermarket taking them off the real shelves. There was obviously little agreement between the “corporate mindset” and the “consumers’ mindset. Global Branding – i.e. that universal needs can be served by universal branded products - can be only successful if there is a large overlap between the persuasive ladder of corporations and consumers, only if both share the same assessment of perception and relevance of the various persuasive elements.

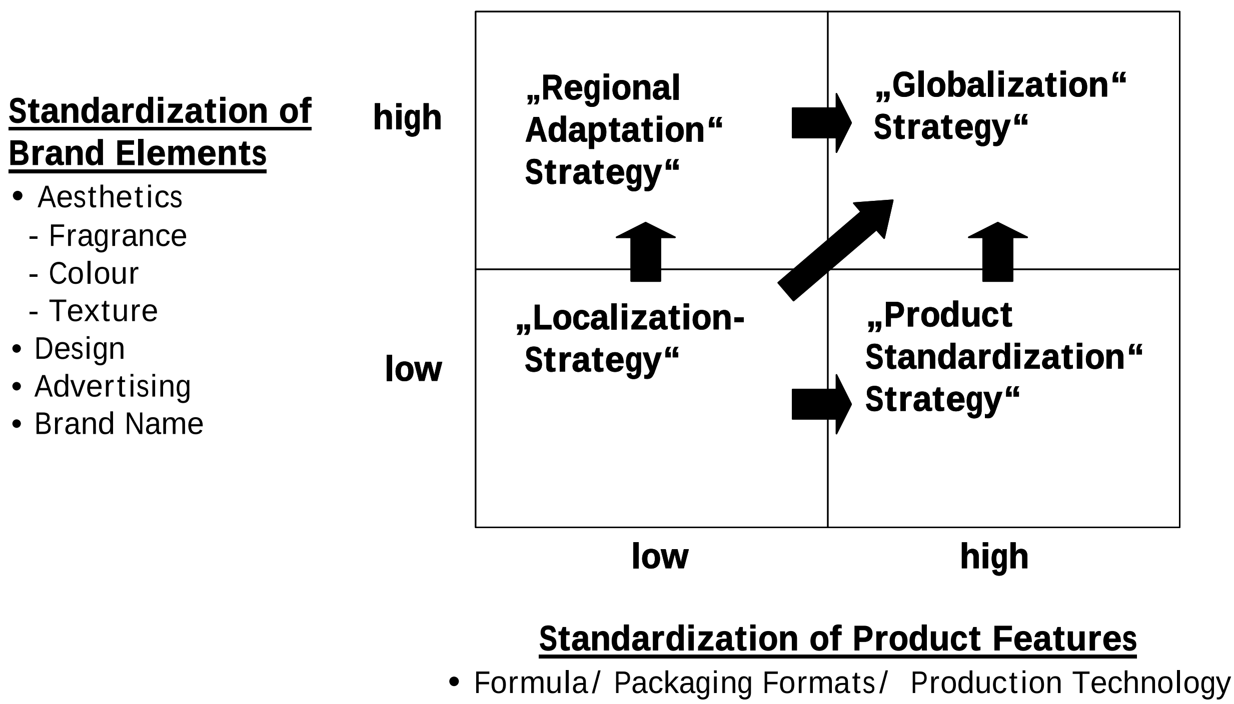
Part III: Consequences for Global Branding Decisions

What are the consequences of our observations for Global Branding decisions? A first consequence would be a <u>strict separation of the Brand and the Product</u>. Thus we suggest to look separately at the various elements that govern the more functional persuasive elements and the more virtual elements. Depending on the product group, one may arrive at different cut-off points here. But the essential principle remains the same – in contrast to traditional marketing thinking we strongly believe that in international marketing the product and the brand parts have to be managed separately.

So let us imagine that we fold the hierarchy described in fig. 1 at a certain cut-off point and we create two orthogonal dimensions: a <u>product</u> dimension and a <u>brand</u> dimension. Now let us introduce another feature to each of these two dimensions: a low and a high complexity both on the product and the brand dimension. Thus product complexity may be low or high, and the same applies for the brand part.

This leads to a simple “four quadrant” matrix as shown in fig.

<u>Fig 4:</u>
Different Levels of Standardization of Product and Brand Parts
and Respective Strategic Options



From our point of view the matrix can be seen as the starting point for a number of different strategies how to address the Global Branding issue in international markets.

Localization Strategy
This is a common situation for corporations with broad local portfolios characterized by a high level of complexity due to low standadization of the product and the brand part; each brand part has its own name, advertising etc., each product part has it own formula, fragrance, color etc.

Globalization Strategy
The exact opposite to the “Localization” strategy; the same product is marketed everywhere under the same brand; high to complete standardization of brand and product elements,.

Regional Adaptation Strategy
This strategy is characterized by a limited number of global brands, however, the features of the product part may vary according to local/ regional specifics – e.g. the sugar content in soft drinks.

Product Standardization Strategy
The “Product Standardization” strategy removes complexity from the product part by international harmonization wherever possible. The standardized (global) product part is then marketed under different (local) brand names, maintaining the established bond of the brand to the consumer.

The four strategic directions can be dealt with in a flexible way. In the chart we have used arrows to indicate several migration paths depending on the actual status of a corporate portfolio of branded products. A common scenario for a multi-local corporation with global branding intentions might be to examine the possibilities of a direct path towards global branding (i.e. move directly form a localization strategy towards a globalization strategy) or via two indirect routes (either by a “regional adaptation” strategy or by a “product standardization” strategy). The chart, however, should not suggest that global branding is the ultimate form to both ensure maximum “consumer penetration” and “economies of scale” at the same time

It is also conceivable that a corporation follows different strategies at the same time – depending again on the type of products (e.g. food vs. electronic appliances) and the type and number of geographies you are operating in.

A further factor to consider is the state of maturity of the individual brands at a given point in time. Even though the brand is marketed in different countries/ regions, this should not lead to the conclusion that its franchises with consumers are identical.

Part IV: Four Branding Strategies in International Marketing

Now that we have suggested a very pragmatic conceptual frame for Global Branding decisions, let us take a more in-depth look at the characteristics and the implications of the various strategies.

The “Localization” Strategy (Different Brands, Different Products).

The “Localization” strategy is designed for brands with a strong local heritage and for products with a very specific ingredient of known local origin – manly addressing a specific local consumer need. In Europe, many organizations a re currently facing a vast portfolio of local brands as a consequence of series of acquisitions in the past two decades. Industry mergers have created graveyards for once trusted and established brands which had to be killed in the post-merger search for financial synergies. A good example for a “Localization” strategy would be the Spanish toiletry brand “La Toja” which uses salt from hot springs at La Toja island as an active ingredient. Both product and brand form a credible entity and respond to the established needs of the Spanish toiletry market, commanding a reasonable and stable market share in Spain.

The “Globalization” Strategy (Same Brand, Same Product).

The “Globalization” strategy still seems the most desirable strategy to follow. We would most probably agree since it entails the highly desired financial advantages that corporate controllers dream about: a product would be manufactured in huge quantities and put to market under the same brand name everywhere; production complexity and marketing costs would go down to a minimum and profits would soar. We would agree, however, only under the precondition that all persuasive elements of the Branded Product have been carefully aligned and agreed with consumers around the globe. Only if we have secured (e.g. via international market research) that we are addressing a universal need with a universal product under a universally accepted psychological carrier system in the form of a commonly understood brand – then we would feel quite relaxed that the marketing effort would be a profit pillar and not a profit killer.

The “Regional Adaptation” Strategy (Same Brand, Different Products).

The “Regional Adaptation” strategy is another interesting alternative. Here the same brand appears under different product frames. Although this may sound absolutely odd to marketing strategists (why produce different products when you already have a global brand?), it makes a lot of sense for us to consider this strategy. The strategy is designed for scenarios where the brand part already stands for trust and confidence in consumers’ minds, yet due to different consumer habits or different needs it seems indispensable to provide different product characteristics. Let us also look at some examples here. Doing the dishes still is done differently in Europe – while the German user does it in hot standing water, the Spanish user does it under running cold water. It seems clear even to chemical laypersons that these different conditions must be met with different chemical ingredients. So if a global brand is positioned as the ultimate product against burnt-in grease, it must meet this functional expectation under all kinds of different usage situations. Asian hair has different structure and different shades compared to Caucasian hair. A coloration product promising ultimate grey coverage must take these different hair structures into account in its formula – again different products may result , even under the same brand. The only requirement is to match the respective functional expectations on the user side in order to achieve stable sales.

The “Product Standardization” Strategy (Same Product, Different Brands).

The “Product Standardization” strategy respects the historically grown respect and trust for local brands, yet avoids the complexity that is normally associated with maintaining a huge local brand portfolio. The sacred “economies of scale” are achieved by harmonizing as many product features as possible and producing the harmonized product in international batch production facilities. The degree of international standardization can even reach to advertising content and shared advertising executions. The only difference in the end might be the brand name and the company endorser.
A good example is the Henkel strategy for “value for money” brands, also known as the “Fox” brands. Here a number of local brands across Europe and the Middle East/ North

Africa regions share a large portion of common persuasive elements – e.g. all use a kind of cartoon “Fox”[9] character in their advertising to emphasize the “value for money” proposition that these brands stand for. Nevertheless they have kept the local and trusted brand names to ensure broad consumer penetration.

Summary and Conclusions

Our paper suggest ways how to deal with the apparent “Global Branding” dilemma. The key lies in the separation of the hence unseparable entity: the brand and the product. We have suggested to look at a slightly different conceptual frame how a “Branded Offer” should be viewed: as a bundle of related persuasive elements that holistically constitute a total value proposition to the consumer.

The “Branded Product” hierarchy includes product elements which can easily be altered and brand elements where changes must be done with caution and only with the conset of the consumer as the co-owner.

Managing the Brand-Product continuum in this way leads to the four basic strategies described in part IV. We regard them as viable alternatives in order to find an acceptable compromise between the mutually exclusive objectives to reach maximum consumer penetration and still have attractive economies of scale. The various strategies help us to make “a dovetail joint”: on the product side we would harvest the required economies of scale, on the brand side we would ensure that we achieve maximum consumer penetration via a balanced portfolio of global and local brands.

We concede that from a corporate perspective the “globalization” strategy makes a lot of sense. In the end, however, it is the consumer who decides. As the “Fairy” case illustrates, product performance really matters, but a familiar (brand) face even matters more. We have learnt that the corporation must be completely aware of the subjective architecture of the the “Branded Product” – in the corporate board room as well as in the consumers’ minds. It is absolutely vital to truly understand how the “Branded Product” is perceived by the still diverse community of its multi-national users and how it can be flexibly adapted to ensure the tightest psychological fit.

[9] The fox is regarded as wise in both European and Arabic countries.