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How unique are local brands?

An empirical comparison of local and international brands in the food industry

Jean-Noël Kapferer and Isabelle Schuiling

Abstract

In the current context of strong globalization, firms have concentrated their efforts in developing international and global brands. As a result, many local brands have been eliminated from companies' brand portfolios. However, local brands often represent franchises that are very successful in local markets. The objective of this article is to better understand what the strengths of local brands are in comparison to international brands. To achieve this, the authors have analyzed a database of 9,739 people and examined more than 500 brands across the four largest countries in Europe, that is UK, Germany, France and Italy. The results show that local brands present a number of strong equity advantages, and also that they are different structurally from their international variety. The authors offer an interpretation and discuss the implications and limitations of their findings. They also make recommendations concerning the appropriate responses for both international and local companies.

In the current context of strong marketing globalization, firms have tended to concentrate on the development of international or global brands, often to the detriment of local brands.

As an example of this strategy, Unilever announced at the end of 1999 that they would concentrate on 400 international brands - or brands having international potential - and that they would eliminate their 1200 other brands, i.e. two-thirds of their brand portfolio. As a result of this, many local brands have disappeared from local markets. One of Unilever's competitors Procter & Gamble decided ten years ago to deploy global marketing strategies to create strong competitive advantage. Since then P & G has mainly invested in international brands, at the expense of even their most successful local brands.

The debate on global marketing is not new, and the topic has been a subject of research for over thirty years (Buzzell 1968; Sorenson and Wiechmann 1975; Levitt 1983; Huszagh, Fox and Day 1986; Jain 1989; Samiee and Roth 1992). Brand specialists have also contributed to the understanding of global brands (Kapferer 1992; Wolfe 1991; Aaker 1999). However within this context little attention has been given to local brands. The existence of local brands have been mentioned in a few articles (de Chernatony, Halliburton, Bernarth 1995; Quelch and Hoff 1986; Halliburton and Hünerberg 1993; Wolfe 1991; Kapferer, 2000, 2002; Schlosser 2002). However no-one has conducted in-depth research with a view to better understanding the situation of local brands, in particular examining their specific strengths.

We believe that an in-depth analysis of local brands is valuable for the following reasons:

First, there are still many more local than international or global brands. Only those sectors that produce cars, computers and other high tech items use purely global branding. In the food sector, local, international and global brands exist alongside each other.

Second, we might question whether all brands have to become international or global to survive in the current globalization context. There may still be strong local brand franchises that cannot be internationalized for market or financial reasons. Some local brands might have no international potential because of cultural differences or consumer habits and preferences. In other cases, some local firms might not have the financial means to expand internationally.

Third, local brands are often eliminated, not because they do not represent strong brand franchises, but rather because their relative sales volumes do not permit economies of scale. Global brands are created rather more as a result of cost considerations than because of consumer interest (Terpstra 1987; Kapferer 1991).

The objective of this study is to identify the strengths of local brands and their specific determinants in relation to international brands. The research addresses two sets of questions: first, what are the differences in brand profile between local and international brands, and second, what are the determinants of the strengths of local brands in relation to international brands.

This research is based on the secondary analysis of the Young & Rubicam worldwide brand database, known as the Y&R Brand Asset Evaluator. The selected sample covered 9,739 people and 507 brands in the four largest countries in Europe (UK, Germany, France and Italy). Twelve product categories in the European food market were selected.

This article is organized as follows: first, we present the theoretical background based on the literature on branding, global marketing and country-of-origin research. Second, we develop the hypothesis for the research. Third, we describe the methodology, and fourth we discuss the key results and their implications from the academic and managerial points of view.

Conceptual Background

Some definitions

In our research, local brands are defined as brands that exist in only one country or in a very limited geographic area (Wolfe 1991). They may belong to a local, international or global firm. International brands are defined as brands having a marketing strategy or mix that is fully or partially adapted to local markets. Global brands are brands that use the same positioning, brand name, product and distribution strategy in all target markets (Levitt 1983; Jain 1989).

It is important to highlight that our definition of local brands is a managerial definition. Local brands are defined on a geographic basis i.e. the ones that exist in a limited geographic area. This does not mean that these brands are necessarily perceived to be local by consumers. For example, the French local chewing gum brand “Hollywood chewing gum” from Cadbury is perceived by French consumers to be an American brand because of its American-sounding name; it is not seen as a local brand. We could apply the same logic to the concept of international brands. A consumer does not know necessarily that a brand is international if its origin is not explicit or implicit in the brand. For example, the well known German cosmetic brand Nivea from Beiersdorf is perceived by consumers as a French brand in France and as an English brand in the UK. In Poland, the people even believe that the brand belongs to the oldest firm in that country.

We therefore consider that our definition of local brands is “objective”. It is based on geographic criteria, and does not rely on perceptions of being local. Testing the hypothesis will provide even more meaningful and robust results as it will involve examining the differences between objectively defined local and international brands, despite the fact that the former may be perceived as international and the latter local.

As a next step, we propose a local brand classification based on the degree of globalization of three key brand components: positioning, name and physical product. First, we identify the “pure” local brands. These are the brands that have positioning, name and physical product that are unique to one country (type I in table 1). Second, we identify "extended" local brands. These are brands that have kept a local brand name but for which the positioning or physical product is no longer local (type II, III, and IV in table 1). The idea is that the brand equity remains local when the brand name is kept local. In this study we will focus mainly on type I local brands.

Table 1 : Classification of local brands

	Type I	**Type II**	**Type III**	**Type IV**
Positioning	Local	Global	Local	Global
Brand name	Local	Local	Local	Local
Physical product	Local	Local	Global	Global

“Pure” local brands **"Extended" local brands**

Finally, we also make a distinction between types of international brands.

In a pre-test, we noted that there were significant differences between profiles of international brands, depending on whether they were analyzed in their country of origin, or in other countries. For example, the French brand “Evian” had a very different brand profile in country-of-origin France from its brand profile in other countries where it was sold, such as Italy, Germany or UK. We therefore make a distinction between these two types of international brands: 1) international brands in their country of origin, and 2) international brands in other countries. The analysis will focus on the local brands and international brands in other countries because the pre-test showed that the profiles of international brands in their countries of origin were closer to that of local brands, than to that of other international brands. Evian is indeed perceived by French consumers in its country of origin as a local brand and not as an international brand. International brands in other countries will be labeled “international brands” in this study.

Incorporating this distinction into the database, the breakdown was as follows: 397 local brands (53% of total), 347 international brands (47% of total) of which 58 were in their country of origin (8% of total) and 289 were in other countries (39% of total).

Theoretical perspectives

We refer to the literature on branding, global marketing and country-of-origin to help us define the concepts used in this research.

Branding literature

Brand equity is the key concept in evaluating the strength or value of a brand (Aaker 1991; Kapferer 1991; Leuthesser 1988; Maltz 1991; Farquhar, Han and Ijiri 1992). This concept has gained increasing importance in marketing literature over the past few years.

This concept is multidimensional and covers different definitions (Aaker 1991; Kapferer 1991; Keller 1992; Srivastava and Shocker 1991). To date there is no consensus among academics on the best way to conceptualize or measure brand equity. Most often academics define brand equity as the financial value of a brand; a consumer definition of brand equity would be the strength of the brand with consumers (Aaker 1991; Kapferer 1991; Keller 1992; Kamakura and Russell 1993).

This concept of brand equity is dynamic in nature, in that it relates both to the assets involved in marketing investment (Kapferer 1991), and to the liabilities involved in possible marketing mistakes (Aaker 1991).

Most researchers agree that brand equity is the added value given to a product after marketing investments.

Based on Srivastava and Shocker's definition (1991), we define brand equity in terms of two elements. One is brand strength as represented by consumer associations and consumer behavior, and the other is brand value as represented by any future gains generated by the strength of the brand.

We can make a distinction between consumer associations and consumer behavior (Feldwick 1996). Associations represent the attributes (cognitive and affective) that might have an influence on the strength of the brand. Behavioral variables - such as market share or loyalty - represent brand strength.

Different models have been developed to measure brand equity (Martin and Brown 1991; Aaker 1991; Keller 1992; Thomas 1993; Lassar, Mittal and Sharma 1995; Park and Srinivasan 1994; Kamakura and Russel 1993).

The review of these different models confirms the lack of consensus concerning the type of variables to be used to evaluate brand equity. We have identified more than 25 different variables. These variables can be classified in four categories: cognitive, affective, behavioral, and other. There seems to be a consensus on the validity of using at least cognitive and affective variables (Keller 1992; Aaker 1991; Thomas 1993; Feldwick 1996). Most models have thus included awareness and image variables. This will be the basis for developing the hypotheses for this research.

Global marketing literature

The context of global marketing is essential to this research, as it influences the development of local, international and global brands.

The interest in global marketing started with Elinder (1961) and was developed as a full concept by Buzzell (1968). Since then, the question has been debated intensively, and many different points of view have been expressed. A group of academics including Levitt (1983) considered that adopting a global marketing strategy was the only way to win in the current environment (Sorenson and Wiechmann 1975; Jain 1989; Levitt 1983). A second group considered that such a strategy was not achievable and would present many risks. They believed that differences in taste, habit, culture and legal constraints would continue to represent barriers between markets (Britt 1974; Wind 1986; Douglas and Wind 1987). A third group considered that a more pragmatic view was necessary. The question was no longer whether to standardize, but rather to decide how much globalization was required, and what types of product should be globalized in order of priority (Onkvisit and Shaw 1987; Quelch and Hoff 1986; Boddewyn, Soehl and Picard 1986; Kashani 1990; Zou, Andrus and Norvell 1997).

The work on global marketing has been mainly focused on products and not on brands (Rosen, Boddewyn and Louis 1989). Global products do not lead necessarily to global brands (Kapferer 1991) because global products can be known by different brand names in different countries. To a large extent they can be even considered as local brands since the brand name remains local, in terms of the classification offered in Table 1. Moving from global product to global brand can be deemed either essential or an opportunity. Such a move is essential when consumer targets are similar in different countries or when the brand holds the signature of its creator (Kapferer 1991). Moving from product to brand can also represent an opportunity to exploit a unique image internationally. Keeping a local brand name can also represent an opportunity. The brand franchise may have been known to consumers for a long time and thus would represent a strong brand equity. It is recognized that there are a range of options between adopting a fully globalized approach and applying a fully differentiated approach (Wind 1986). Decisions taken on the three key elements of positioning, brand name and product have an essential influence on the decisions that may be taken on R&D and marketing strategy.

Different authors have shown that the degree of globalization depends very much on the marketing mix being considered. Decisions related to the product itself are more standardized than those on communication, distribution, sales and prices (Walters 1986; Akaah 1991; Kapferer 1992).

Country of origin literature

Country of origin literature is also of interest in this research. It analyses the effect of the country of origin on the consumer perception of a product.

Some define the country of origin as the country of origin of a firm or a product (Johansson, Douglas and Nonaka 1985; Ozsomer and Cavusgil 1991), or the country where the product is manufactured or assembled (Bilkey and Nes 1982; Han and Terpstra 1988). The situation these days is more complex, with products no longer necessarily being produced in the company's country of origin.

Different studies have shown that consumers have a tendency to evaluate local products more favorably than they evaluate foreign products (Nagashima 1977; Kaynak and Cavusgil 1983; Han 1989; Bilkey and Nes 1982; Schooler 1971). In these studies the country of origin was always explicit, and was often the only variable tested. The fact that it was the only variable tested was considered a limiting factor in this work; recent studies have shown that the influence of the country of origin was less important when tested with other variables (Ahmed and d’Astous 1993; Roth and Romeo 1992; Akaah and Yaprak 1993; Samiee 1994).

However the country of origin is implicit in certain local and international brands. For consumers, Sony, Mercedes and IBM have clear Japanese, German and US origins. Many global brands are of US origin, and this origin can be implicit to consumers. Consumers can also be wrong concerning the country of origin. Singer was considered German by the Germans, British by the British and American by the Americans for many years (Samiee 1994). In our research, the country of origin was not explicit but was implicit for certain brands. All results of the Country of Origin research can therefore not be directly applied to our research.

Hypotheses

The objectives of the research were 1) to determine the difference in brand profile between local and international brands, and 2) to identify the specific determinants of the strengths of local brands in comparison to international brands.

These objectives threw up different sets of hypotheses. The first set concerned hypothesized differences in brand profile. These could be considered as advantages of situation and history. Local brands often have existed in a particular market for many years, and they may benefit from their longer exposure to consumers than international brands usually have had.

A second group of hypotheses was related to what might be termed structural advantages. The idea here was to evaluate what were the specific determinants of the strengths of local brands. In these cases we tested whether there was a structural difference between a local or international brand.

The statistical tools that were used to test the hypotheses were very different depending on the set of hypotheses being analysed. The first set was based on means comparison via analysis of variance (ANOVA). The second set of hypotheses exploited regression analysis using a “dummy” variable.

Hypotheses related to the brand profile advantages

Relying on brand equity research and literature, we have identified the following major variables to be included in our model: awareness, perceived quality, value, trust, distinctiveness, tradition and authenticity.

Awareness

Awareness was a key variable identified in almost all brand equity models (Aaker 1991; Kapferer 1991; Keller 1992; Thomas 1993; Agarwal and Rao 1996; Krishnan 1996; Na, Marshall and Keller 1999; Mackay 2001). Awareness was also viewed as an essential element in models that illustrated the dynamic nature of the brand equity concept (Gordon, di Benedetto and Calantone 1994; Brand Asset Valuator Y&R).

It was therefore important to evaluate whether awareness of local brands could be at a different level to that for international brands. We might have indeed questioned whether awareness was not at a higher level for local brands because consumers had known them for a long time, or because such brands had succeeded in developing a strong relationship with consumers. Local brands have often been present in a local country for many years.

H1: Local brands benefit from a significantly higher awareness level than international brands do.

Perceived quality

Perceived quality is the most frequent image attribute present in brand equity models. Quality is sometimes explicitly mentioned in the model (Aaker 1991; Kapferer 1991; Kamakura and Russell 1991; Martin and Brown 1991; Feldwick 1996) or viewed as part of the overall brand image (Keller 1992; Gordon, di Benedetto and Calantone 1994). Marketing literature has stressed the importance of product quality as an essential element in brand success.

We had to ask whether the perceived quality of local brands could be stronger than that of international brands. Local brands could benefit from the strength of relationships built up with consumers over the years.

H2: Local brands benefit from a significantly higher quality image than international brands do.

Value

Value was the second image attribute that appeared in several brand equity models (Feldwick 1996; Thomas 1993; Martin and Brown 1991; Lassar, Mittal and Sharma 1995). Value was a key variable that consumers used to evaluate a brand in the market. We define value as the “perceived brand utility relative to its costs, assessed by consumers". It was therefore important to discover whether value perception was different between local and international brands. Because international brands are often imported or occupy the high end of the market , in the food sector , one may hypothesize the following:

H3: Local brands benefit from a significantly higher value image than international brands do.

Trust

We believe that the variable of trust was an important attribute in assessing the strengths of a brand. We found this attribute in a couple of brand equity models (Lassar, Mittal and Sharma 1995; Martin and Brown 1991).

One might legitimately believe that local brands were better placed to reassure consumers. Local brands have often been on the market for many years and are likely to have built up a more intimate relationship with consumers than international brands have. This is why for instance, as they get older, senior consumers tend to favor local brands when they need to change brands (Laurent and Pandraud; 2003).

We wanted to evaluate whether local brands were able to create stronger relationships of trust with consumers than international brands were.

H4: Local brands benefit from a stronger image of trust than international brands do.

Distinctiveness

The Y&R Brand Asset Valuator viewed differentiation as one of the key variables in assessing the strengths of a brand. Marketing literature also stressed the importance of the distinctive character of brand positioning (Ries and Trout 1985; Kapferer 1991) in contributing to the success of a brand. We defined distinctiveness as the degree to which the consumer perceives that a brand is distinct from its competitors.
We wanted to evaluate whether local brands had a more distinct positioning than international brands had. By their very nature, local brands have more freedom in deciding their positioning in their local market than international brands have.

H5: Local brands benefit from a more distinctive image than international brands do.

Tradition

Local brands could also benefit from advantages related to the idea of tradition. In the food market for example, the perception of tradition is essential. Products and local brands are often imbued with the local habits and traditions of the market. However, such traditional elements seemed to constitute a proportionately smaller advantage compared to products that have a "common denominator" that pleased a larger number of consumers across a number of different markets (Fischler 2001*)*.

We wanted therefore to evaluate whether the element of tradition in the image of local brands was stronger than that in the image of international brands.

H6: Local brands benefit from a more traditional image than international brands do.

Authenticity

We also noted that the image of authenticity appeared to be important for local brands. We wanted to verify whether this characteristic was stronger for local brands than it was for international brands.

H7: Local brands benefit from a better image of authenticity than international brands do

Usage and Usage intention

It was also essential to evaluate whether usage and usage intention levels were higher for local brands than international brands. In this research, usage and usage intention represented the strengths of the brands. These variables of strengths were the ones available in the database.

We considered that usage and usage intention levels were higher for local brands than they were for international brands, because local brands were likely to have built up a strong relationship with consumers over the years.

H8: The strengths of local brands are higher that the strengths of international brands are.

Hypotheses related to the determinants of the strengths of local brands

After identifying the differences in brand profile between local and international brands, we wanted to evaluate what the specific determinants of the strengths of local brands could be. The determinants included the different variables of the conceptual model. These were quality, value, trust, distinctiveness, tradition and authenticity. Strengths were represented by the usage and usage intention variables, both available in the database.

We needed to determine whether these variables played a different role in establishing the strengths of local brands, all other things being equal. The question was whether the impact of these variables was different depending on whether the brand was local or international.

We first wanted to test whether brand awareness was a specific determinant of the strength of local brands. We wanted specifically to evaluate whether the level of usage or usage intention increased with any increase in level of awareness.

H9: Awareness is a specific determinant in the strengths of local and international brands.

We also wanted to test whether the image variables in our conceptual model had an impact on the relative level of usage or usage intention between local and international brands. We had to check whether any of these variables played a specific role in determining the relative strengths of local brands and international brands.

H10: The image variables of quality, value, trust, distinctiveness, tradition and authenticity are specific determinants of the strengths of local and international brands.

Methodology

Overview

The research was based on the secondary analysis of the Young & Rubicam worldwide brand database, known as the Y&R BrandAsset Valuator. The original Y&R database covered 44 countries worldwide and 20.000 brands. Three waves of interviews have been conducted since the database was created in 1993 and more than 230,000 persons have been surveyed so far.

From this database we selected a sample of twelve product categories in the food sector. They represented 507 brands and 9,739 persons interviewed. Each brand was evaluated on cognitive, affective and behavioral bases. Data on awareness, brand image (48 image criteria were available to consumers to evaluate each brand), usage and usage intention, and socio-demographics were therefore available. The appendix contains the list of product categories.

The food sector was selected because first it still had many global, international and local players. Unilever, Nestlé, Mars, and Kraft Jacobs Suchard are good examples of international and global firms. Meanwhile, strong local players were still present in key local markets. Second, different firms in the food industry followed very different marketing strategies. Mars had a very global approach, whilst Nestlé and Kraft Jacobs Suchard followed a "multi-domestic" strategy. Third, the food industry had a large number of local, international and global brands that managed to co-exist. Last, the food market had developed historically around strong cultural and traditional values that favored the development of local brands. However, this market was now changing rapidly. Products reflecting local traditions were being replaced by products that apparently satisfied the largest number of consumers. These changes were the result of the way the food industry had developed over recent years, not least because of the concentration and internationalization that had taken place within the retailing industry. International retailers tended to favor international brands that belonged to international and global players. Such retailers had a big impact on the brands that could be kept on the shelf.

The choice of categories in the Food market was based on the presence of both local and international brands.

This study selected the four largest European countries - UK, Germany, France and Italy as these markets represented more than 80% of total European food consumption.

Database structure

The sample selected from the Y&R database was structured around 424,204 answers from across Europe. Each answer covered 64 different variables including the 48 image attributes, awareness data, usage and usage intention data and socio-demographic figures.

The database strengths and weaknesses were analyzed before the data was used. This was necessary to see if the database needed to be restructured so as to respond adequately to the hypotheses.

The strengths of this database included: a) the high number of different variables available (cognitive, affective and behavioral attributes); b) the high number of available answers from all European countries (424,204) and from each specific country (68,580 from France, 142,534 Italy, 91,499 UK, and 121,591 Germany); c) the high number of respondents from the total database (9,739) and from the countries under consideration (3,460 from Germany - 36% of total, 2,474 UK - 25%, 1,915 France - 20%, and 1,890 Italy -19%); d) the relatively high number of brands, 507 for all European countries. 397 (78%) were local, and 110 (22%) were international.

The key weakness of this database was the low measurement level for certain variables. For example, the 48 brand image attributes were all binary variables.

We were able to overcome this apparent weakness by restructuring the database.

We built the new structure around brands rather than around respondent answers. We achieved this by aggregating the respondent information using SAS software. This allowed us to obtain the percentage of people who had given information concerning a specific brand.

For example, the 48 image variables were originally binary variables. Respondents attributed a 1 or 0 to each image attribute. By aggregating the image data, we were able to calculate the percentage of people who had given the 1 score to one attribute. Thus, in the new structure, we now had the percentage of persons who had given a certain image attribute to a certain brand. We applied the same changes to the awareness, usage and usage intention data. As a result, we transformed binary variables into percentages to produce metric variables.

The unit of analysis was now the brand per product category and per country. Indeed, there was a need to differentiate brands according to category, and also to differentiate them according to country. Across the different categories there were six brands that shared the same brand name. This demonstrated the need to differentiate them by category. It was also necessary to differentiate brands by country. A brand was indeed perceived differently from one country to another. For example, Barilla in France was not perceived in the same way as Barilla in Italy or Barilla in Germany were. The result was that we then had 744 brand “units”, as opposed to the original 507 brands. International brands were counted in each country where they were present.

Importantly, brands that were present in only one country were treated as local brands (see our definition).

Database analysis

The variables in our proposed conceptual model were evaluated in the following way: The aided awareness was evaluated based on the results of the question on brand familiarity from the questionnaire (Likert scale) by excluding those who had indicated they didn't know the brand. This is the way Young and Rubicam calculate the aided awareness level.

We evaluated the different image variables of the conceptual model using a selection of image attributes that best described the proposed conceptual variables. They were selected from the list of 48 image attributes that consumers could select to evaluate each brand. The attributes included words such as “friendly”, “reliable”, “fun”, “dynamic”, “energetic”, “prestigious”, “high quality” and “up-to-date”. For the proposed conceptual model, perceived quality was based on the “high quality” item, value on “good value”, trust on “trustworthy”, distinctiveness on “distinct”, tradition on “traditional” and authentic on “authentic”.

Results

Hypotheses related to brand profile advantages

The objective of the first group of hypotheses was to evaluate the difference in profile between local and international brands.

Tests of differences between local and international brands were carried out through means comparisons using the analysis of variance (ANOVA) procedure. All Anova statistics are provided in Table 2.

Table 2: Comparaison of means

Variables –(%)	**Local brands (N=397 brands)**	**International brands (N=289 brands)**
AWARENESS	85.44	**73.44*** (<.0001)
HIGH QUALITY	25.29	24.25 (0.572)
TRUSTWORTHY	22.11	**17.89 *** (<.0001)
GOOD VALUE	18.80	**16.79 *** (0.004)
SIMPLE	18.57	17.15 (0.051)
DOWN TO EARTH	15.71	**14.65 *** (<.0001)
FRIENDLY	15.44	14.37 (0.076)
TRADITIONAL	15.12	**12.71 *** (<.0001)
TRENDY	14.04	14.48 (1.000)
HEALTHY	15.56	**11.35 *** (<.0001)
ORIGINAL	13.57	13.32 (1.000)
RELIABLE	22.11	**17.89 *** (0.001)
DISTINCT	12.56	12.76 (1.000)
SOCIAL	12.54	12.22 (1.000)
KIND	11.74	12.17 (1.000)
AUTHENTIC	10.41	**10.09** * (0.001)
FUN	9.76	**11.33 *** (0.007)
SENSUAL	11.22	9.29 (0.060)
USAGE	42.92	**37.43*** (0.001)
USAGE INTENTION	45.99	47.52 (0.851)

N= Number of brands

*****= Significant difference between international and local brands p<0.05

Awareness

Results in table 2 showed a significant difference ($p<0.05$) in awareness level for local brands (85%) compared to that for international brands (73%). Local brands seem to benefit from a higher awareness level than that for international brands (H1).

Table 2

Image attributes

Concerning brand image, the results in table 2 indicated that there was a significant advantage for local brands over international brands, in terms of “trust” (ML*=22.11 vs MI**= 17.89), “value” (ML=18.80 vs MI= 16.79) and “down to earth” (ML=15.71 vs MI=14.65). These brand attributes were among the five most important attributes of the database based on their frequency.

The results also indicated that H2 and H5 were not verified: local brands did not benefit from a significantly better quality image, nor did local brands benefit from a more distinctive image than international brands did.

* ML: Mean - local brands ; ** MI: Mean - international brands

A comparison on the usage variable showed higher ratings for local brands (42.9%) than for international brands (37.4%). This was another indication of the strengths of local brands. Interestingly, usage intention figures showed a different pattern, with ratings being slightly higher for international brands (47.5%) than for local brands (45.9%). This seemed to indicate that consumers were seduced more by international brands - but that in reality they preferred to purchase local brands.

We therefore concluded that H8 was confirmed - that local brands were stronger than international brands - when the strengths were evaluated based on usage. When they were evaluated based on usage intention, H8 was not verified.

In order to check the validity of these results, we conducted a sensitivity analysis that took into account the relative weights of certain product categories in the database.

The alcohol and the beer categories seemed to be over-represented in the total database, accounting together for 36%. We therefore reran the analyses excluding these two categories. The sensitivity analysis showed that the awareness level was still significantly higher for local brands (87.25) than it was for international brands (78.17), and that the image for local brands in the areas of “trust”, “healthy” and “reliable” was still significantly stronger than it was for international brands. We did not see any major differences in the results when these two product categories were excluded from the analysis.

These results indicated that awareness levels and some key brand image attributes were stronger for local brands than they were for international brands. However the question arose whether the strong image ratings of local brands were not related to their higher level of awareness, itself a mechanical result of having been there for a longer time than international brands had been.

To answer this question, the authors performed regression analyses that predicted each image attribute based on the awareness level. Second, they predicted image attributes by making the mean level of awareness of international brands (73.4%) equivalent to that of local brands (85.4%). A summary of the statistics is provided in table 3. The first column displays determination coefficients (R^2) resulting from the 48 linear regressions. The second column shows the mean of each local brand image attribute at their original awareness level (85.4%). The third column shows the mean of each international brand image attribute at their original awareness level (73.4%). The fourth column shows the increase in image attribute level against the increase in international brand awareness level from 73.4% to 85.4%. The fifth column indicates the difference in mean between levels of image attributes of local and international brands when the mean awareness level is equalized. The last column calculates the index of the difference calculated in the fifth column.

Table 3 : Predicted image for an increase awareness from 73.4% to 85.4%

VARIABLES	R2	Local brands means Awareness= 85.44	International brands means Awareness= 73.44	International brands means If Awareness= 85.44	Difference Local and International Brands	Index Local/ International brands If Awareness= 85.44
HIGH QUALITY	0.31	25.29	24.25	27.07	-1.78	0.93
TRUSTWORTHY	0.24	22.11	17.89	20.23	1.88	**1.09**
GOOD VALUE	0.36	18.80	16.79	19.47	-0.67	0.97
SIMPLE	0.17	18.57	17.15	18.77	-0.20	0.99
DOWN TO EARTH	0.16	15.71	14.65	15.97	-0.26	0.98
FRIENDLY	0.17	15.44	14.37	15.70	-0.26	0.98
TRADITIONAL	0.25	15.12	12.71	14.27	0.85	**1.06**
TRENDY	0.09	14.04	14.48	15.50	-1.46	0.91
HEALTHY	0.03	15.56	11.35	12.27	3.29	**1.27**
ORIGINAL	0.15	13.57	13.32	14.64	-1.07	0.93
RELIABLE	0.22	22.11	17.89	19.06	3.05	**1.16**
DISTINCT	0.17	12.56	12.76	13.70	-1.14	0.92
SOCIAL	0.09	12.54	12.22	13.24	-0.70	0.95
KIND	0.06	11.74	12.17	13.19	-1.45	0.89
AUTHENTIC	0.02	10.41	10.09	10.33	0.08	**1.01**
FUN	0.18	9.76	11.33	12.90	-3.14	0.76
SENSUAL	0.02	11.22	9.29	9.93	1.29	**1.13**
CLASSY	0.00	8.63	9.24	8.32	0.31	**1.04**
DIFFERENT	0.02	8.57	8.87	9.09	-0.52	0.94
POPULAR	0.15	8.56	8.33	8.96	-0.40	0.95
A LEADER	0.14	8.07	8.63	9.33	-1.26	0.87
DYNAMIC	0.05	7.93	8.11	8.57	-0.64	0.92
CARES ABOUT IST CLIENTS	0.19	8.44	7.15	8.00	0.44	**1.06**
CAREFREE	0.10	7.80	8.16	8.82	-1.02	0.88
TOUGH	0.02	7.82	7.63	7.94	-0.12	0.98
ENERGIC	0.12	7.47	7.42	7.98	-0.51	0.94
CHARMING	0.10	7.44	7.33	7.91	-0.47	0.94
HELPFUL	0.06	7.96	6.35	6.93	1.03	**1.15**
PRESTIGIOUS	0.01	6.92	7.39	7.55	-0.63	0.92
STRAIGHTFORWARD	0.05	7.08	7.16	7.46	-0.38	0.95
UNIQUE	0.07	4.40	7.23	7.61	-3.21	0.58
UP-TO-DATE	0.05	6.90	7.05	7.42	-0.52	0.93
OBLIGING	0.13	7.08	6.58	12.90	-5.82	0.55
INTELLIGENT	0.03	6.08	6.74	6.99	-0.91	0.87
HIGHLY PERFORMING	0.08	6.72	6.54	7.02	-0.30	0.96
BEST	0.23	6.26	6.45	7.47	-1.21	0.84
STYLISH	0.00	5.64	6.71	6.78	-1.14	0.83

Table 3 : Predicted image for an increase awareness from 73.4% to 85.4%

VARIABLES	R2	Local brands means Awareness= 85.44	International brands means Awareness= 73.44	International brands means If Awareness= 85.44	Difference Local and International brands	Index Local/ International brands If Awareness= 85.44
SOCIALLY RESPONSIBLE	0.05	5.72	5.86	6.16	-0.44	0.93
INNOVATIVE	0.00	6.08	5.63	11.50	-5.42	0.53
DARING	0.01	5.60	6.05	6.21	-0.61	0.90
RESTRAINED	0.12	5.82	5.86	5.51	0.31	**1.06**
INDEPENDANT	0.01	5.01	5.50	5.56	-0.55	0.90
RUGGED	0.01	5.20	5.07	4.15	1.05	**1.25**
WORTH PAYING MORE	0.02	5.00	5.22	5.48	-0.48	0.91
GLAMOUROUS	0.01	4.52	5.44	5.23	-0.71	0.86
PROGRESSIVE	0.04	4.77	4.52	4.76	0.01	**1.00**
UNAPPROCHABLE	0.12	4.43	5.09	4.54	-0.11	0.98
ARROGANT	0.02	2.79	3.05	2.92	-0.13	0.95

We observed from these results that the effect of awareness on image varied with the image attribute. The attributes that seemed to be more affected by a change in awareness (based on the coefficient of determination) were first the five key variables of the database: “high quality” (31%), “trust” (24%), “value” (36%), “simple” (17%) and “down to earth” (16%). In the second group of variables, we singled out the following attributes for which the effect was also strong: “friendly” (17%), “traditional” (25%), “reliable” (22%) and “distinct” (17%).

We observed that among the five key database attributes, the attribute of “trust” was rated higher for local (+9%) than for international brands. We also saw the same trend in the other image attributes of “traditional” (+6%), “healthy” (+27%), “reliable” (+16%), “authentic” (+1%), “sensual” (+13%), “classy” (+4%), “cares about its clients” (+6%), “helpful” (+15%), “restrained” (+6%), “rugged” (+25%).

We concluded that these attributes related to specific local brand equity; the scores were still superior to international brands when the awareness level was equalized.

Conducting the same exercise with international brands, we found that international brand images were defined by the following attributes: “fashionable”, “distinct”, “friendly”, “fun”, “prestigious”, “stylish”, “unique” and “trendy”. The same analysis excluding the alcohol and beer categories showed no significant difference in results.

The conclusion from these exercises was that local and international brands had very different brand images.

Hypotheses related to structural advantages

The objective with the second group of hypotheses was to identify what the specific determinants of the strengths of local brands were.

To achieve this, we used multiple linear regression models with a “dummy” variable. The dependent variable was brand strength as measured by usage and usage intention. The dummy variable was designed according to the type of brand - local or international brand - under consideration. The independent variables (determinants) were specific variables chosen from the conceptual model.

The first regression based on usage as dependant variable led to a significant (($F= 95.71$, $p<0.001$) percentage of explained variance (70.2%). The weight of each individual variable was significant. but none of the interaction between the variables of the model and the indicator variable (local and international brand) was significant, at a level of significance of 5%, as indicated in table 4. The conclusion was then that there was no significant difference between local and international brands in terms of local brand strength when the strength was measured by usage. In this case, the fact of being local or international had no effect on the strengths of local brands. The awareness and the image attributes of the conceptual model should not be considered as specific determinants of the strengths of local brands (H9 and H10).

A second regression analysis with the usage intention as the measure led to a relatively low level of explained variance (37.4%). The variance analysis was very significant (F= 25.07 and P<0.001). One interaction variable between the image attribute of "trust" and the indicator (local/ international) was significant, at a level of 5%. No significant results were found with the other variables, as indicated in table 4.

The image attribute of "trust" was one of the determinants of the strengths of local brands when the variable of strength was based on usage intention (H10).

Table 4 : Results of regression analysis for two independent variables : usage and usage intention

	Dep. variable= usage			**Dep. variable=Usage intention**		
Variables	Beta Coefficient	T value	Probability	Beta Coefficient	T value	Probability
Awareness	0.20	4.47	**<.0001**	0.13	2.05	**0.0412**
High quality	0.15	3.54	**0.0004**	0.28	4.50	**>.0001**
Value	0.52	12.51	**<.0001**	0.51	8.40	**>.0001**
Trust	0.21	6.14	**<.0001**	-0.07	-1.40	0.1618
Distinct	0.10	3.02	**0.0026**	-0.04	-0.86	0.3877
Authentic	0.18	4.71	**<.0001**	0.17	3.06	**0.0023**
Traditional	-0.18	-5.16	**<.0001**	-0.18	-3.70	**0.0002**
Progressive	0.14	4.59	**<.0001**	0.08	1.71	0.0872
Indicator variable	0.01	0.11	0.9096	0.33	2.07	**0.0386**
Indicator x awareness	0.09	0.75	0.4538	-0.03	-0.17	0.8612
Indicator x High quality	-0.01	-0.14	0.8870	-0.21	-1.65	0.0995
Indicator x value	0.02	0.29	0.7700	-0.19	-1.73	0.0835
Indicator x trust	-0.04	-0.71	0.4754	0.29	3.20	**0.0014**
Indicator x Distinct	-0.04	-0.49	0.6239	0.12	1.01	0.3110
Indicator x Authentic	0.12	1.43	0.1542	-0.12	-1.03	0.3053
Indicator x Traditional	-0.09	-1.45	0.1488	0.01	0.14	0.8874
Indicator x progressive	-0.05	-0.88	0.3770	-0.10	-1.24	0.2150

Discussion

Summary and contributions

The objective of this research was to understand the relative strengths of local and international brands.

The major contribution of this research was first to analyze a new topic within the area of branding. The focus of research so far has been almost exclusively on international and global brands rather than on local brands. However, local brands are still numerous in important markets and represent what are often called the “local jewels “ of multinational corporations, who used them as cash cows in their portfolio, financing the development of the global brands in the particular country (Kapferer 2001, 2002). Second, the study used the Young & Rubicam worldwide brand database. This represented a key opportunity for the authors, as access to brand equity information is usually very difficult to get for confidentiality reasons. Indeed, companies do not like to publish information on brands that constitute part of their company value. Third, the database included information from a very large number of people and offered many different variables in the cognitive, affective and behavioral areas. Fourth, the research provided an interesting international perspective across four large European countries. It is difficult to generate data on such a large international scale. Fifth, understanding the strengths of local brands was of key managerial importance within the current context of globalization, where many managers dealt with portfolios containing both local and international brands.

The research results showed that local brands enjoyed a greater level of awareness and brand image than international brands did. Local brands - tested using the conceptual model - achieved stronger ratings in trust, value, tradition and authenticity.

Local brands also attained higher usage rates than international brands did, whilst the figures concerning usage intention showed the opposite effect. This seemed to indicate that consumers preferred to use local brands even if they seemed to be more attracted by international brands.

The research results also indicated that local and international brands had very distinct brand images. The two types of brand were not perceived similarly by consumers. Local brand images were defined through the attributes of “trust”, “healthy”, “traditional”, “authentic”, “cares for its clients”, “helpful” and “restrained”. International brand images were defined through the attributes of “fashionable”, “distinct”, “kind”, “fun”, “prestigious” and “up-to-date”.

The objective was also to test the specific determinants of the strengths of local brands. The idea was to test whether local brands had structural advantages that were related to whether they were local or international.

The research results show that the attribute of trust seemed to represent one specific determinant of the strengths of local brands in relation to international brands, when strength was measured by usage intention.

Several statistical analyses confirmed that the variable of trust was a key characteristic of local brands. This seemed to suggest that local brands built unique relationships with consumers over the years, leading to local brands having a trust advantage. Finally, the results were also confirmed following the exclusion of the alcohol category that was somewhat over-represented in the database. This highlights the robustness of the findings.

Managerial implications

There are several implications to be drawn by management teams from this research. First, the results suggest that local brands benefit from strong brand equity elements that should not be underestimated.

We might question whether these advantages might represent real barriers to entry for international brands. International brands might be able to build strong awareness and good image ratings after years of investment and large marketing budgets. Owners of such brands are usually able to spend massively if need be. However we believe that local brands might be better protected because of the attribute of trust that we have identified. Trust is a unique relationship that can only be built up with consumers over years. It is not linked to any particular level of investment. An international brand could not necessarily reproduce such a unique relationship with consumers, even following substantial investment in marketing.

From a longer term point of view international and global firms should consider whether it is sensible to eliminate brands that have strong equity advantages. In the short term it might appear attractive to market international brands aggressively so to benefit from economies of scale. However in so doing, such a strategy would appear to cause brands that have built up unique relationships with consumers to disappear.

We have seen in the recent past that multinational firms have started recognizing the virtues of local brands. Through their actions Unilever has acknowledged that trust is essential in developing brands in the food sector. In their ice cream business, they have kept the best known local brand names - such as Miko in France, Wall's in UK and Agnesi in Italy - while globalizing logos, products and new concepts such as Magnum and Solero. The Danone group has also identified that local brands are a source of pride in some countries. As the group has pursued its policy of globalizing its well-known "Lu" biscuit brand, they have found that they have had to retain in

Eastern European countries the Opavia brand franchise that had been a synonym of trust and pride for consumers. Even in the traditionally globalized cosmetic business, L'Oréal has discovered that local brands have the power of retaining clients. In globalizing the American “Maybelline” brand, L'Oreal has pursued a double branding strategy where Maybelline is the host brand and the other name is the local brand. For example, the company markets Gemey-Maybelline in France and Jade-Maybelline in Germany.

Local firms should continue to exploit their leading local brands by building on the unique relationships they have created with consumers. This can be achieved by better understanding the needs of consumers and by offering a product that best fulfils their needs. International and global firms cannot offer tailor-made products if they want to satisfy the largest number of consumers. We also suggest that local groups investigate whether there might be opportunities for them to purchase local brands that are being sold by multinational companies.

Limitations and further research

One limitation of this research was the choice of the reference market.. Although we analyzed twelve different product categories, they were all in the food sector. Results could not be automatically extrapolated across to other markets. In fact one may wonder if classifying hi-tech categories as "local" is an asset (Kapferer 2001). However one should also be aware that a large number of people are not ready to buy the latest innovation but prefer well established domestic brands. This is borne out in the TV market with brands such as Ferguson in the UK, Grundig or Telefunken in Germany, and Brandt in France.

Another limitation could be the limited number of available strength variables tested in the models (usage and usage intention). For further research, we recommend that different strength variables be tested, and that these would include in priority the variables of market share and leadership position. Lead brands might show different determinants of strengths than the number 2 or 3 brands might. We also recommend testing other independent variables. An example here could be brand age. The strength of a local brand could be correlated with the number of years it had existed in a market. Last, another route for further research could be to test whether consumers perceive brands to be local or international. These findings could help us identify new arguments for marketing any particular brand.

APPENDIX 1

Brands per product category

Product category	Number of brands	Number of local brands (% of total)	Number of international brands (% of total)
Alcohol	153	61(40%)	92(60%)
Chocolate	124	53(43%)	71(57%)
Beer	119	70 (59%)	49(41%)
Yogurt	72	45(63%)	27(38%)
Mineral water	45	26(58%)	19(42%)
Frozen goods	38	24(63%)	14(37%)
Chewing gums	36	16(44%)	20(56%)
Fruit juices	36	29(81%)	7(19%)
Coffee	36	25(69%)	11(31%)
Ice cream	34	17(50%)	17(50%)
Soup	26	12(46%)	14(54%)
Pasta	25	19(76%)	6(24%)
TOTAL	744	397 (100%)	347 (100%)

Brands per country

TOTAL	Number of brands	Number of local brands (% of total)	Number of international brands (% of total)
All countries	744	397(53%)	347 (47%)
France	172	74 (43%)	98 (57%)
Germany	226	139 (62%)	87 (38%)
Italy	177	108 (61%)	69 (39%)
Great-Britain	169	76 (45%)	93 (55%)

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