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Crossing Borders and Cultures: Global Branding

Many of the world's most valuable brands are global in scope. They benefit from shared meanings, systems, and stories across markets, and much of their allure for consumers is in their "global-ness". Other leading brands are more domestic or regional in their scope, relying heavily on a local connection to consumers in their markets. Global branding provides companies with compelling economies of scale in everything from research and development (R&D), to marketing, to operations. However, global marketing also adds significant complexity in both strategy and execution. Complicating matters further for global brands are externalities around geopolitical and cultural dynamics over which companies have no control but which may have significant impact on business operations and brand sales, not just within a particular country, but also worldwide. As companies strategize whether and how to export their domestic brands internationally, managers must take care to choose the right global branding strategies to capitalize on efficiencies while maximizing effectiveness.

One of the first decisions for managerial consideration is the brand's global footprint, i.e., the number of and nature of markets in which a brand plans to operate. The next decision quickly follows and involves determining the degree of harmonization (or conversely, the degree of variation) the team will allow in the expression of the brand across markets. Brands with higher degrees of harmonization are usually more efficient as they benefit from economies of scale, while brands with higher degrees of variation tend to benefit from greater local relevance.

A *global brand* is a product or service that bears a shared brand identity system that is recognized, accepted, and sold in most or all parts of the world. It typically has an identical or highly similar name, logo, visual identity, strategic positioning, and core story throughout the globe, although marketing tactical execution can vary across markets, with differences appearing in products (e.g., customized flavors), packaging (e.g., localized sizes or formats), price points, distribution strategies, and even advertising and promotional strategies. By contrast, a *multi-national brand* operates in fewer markets or regions, and/or has more variation in brand identity, strategic positioning, and/or visual expression across the markets in which it operates. Global and multi-national brands compete with *local brands*, which operate exclusively in one market or region. While local brands usually lack the scale of global and multi-national brands, they often benefit from an ability to focus – fully tailoring the messaging and offerings to the consumer and market conditions of one country and/or culture. In particular, local brands that operate in markets with large domestic audiences, such as in China, India, and the U.S., often can build large brands without venturing outside their home borders. Although it primarily only operates in China, the apparel and sportswear brand Li Ning has sales of over $2 billion, while Amul,

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an Indian dairy brand garners sales of over $5 billion mostly from its home market.[1] **Exhibit 1** provides a visual mapping of these categories of brands (and examples of each) against the two key decisions.

There can also be a difference between a *global brand identity* (i.e., the strategic intent for a brand to be global set by its managers) and the *global brand image* (i.e., the degree to which consumers perceive the brand to be global and to have a shared meaning around the world). In many cases, consumers' perception of a brand as "global" adds to its stature. However, consumers are not always clear on the country of origin of a brand and may believe that a global brand is local. For example, American consumers are often unaware that Red Bull is an Austrian brand or that the LEGO brand is Danish. Some Asian consumers believe that Budweiser, an American brand, is German.

The world's largest global brands have performed very well. According to the Kantar BrandZ™ Most Valuable Global Brand List for 2021, the top 100 global brands are collectively worth $7 trillion and have tripled in value over the last ten years.[2] Creating such value from global brands requires successfully managing many issues related to the economics of global branding, the management of global brands, and the mobilization of organizations around global brands. This note will explore these issues and highlight key opportunities and challenges in the future of global branding. In it, we draw upon our many years of experience managing global brands at The LEGO Group and Gillette.

The Economics of Global Branding

The Demand Side: How Consumers Respond to Global (vs. Local) Brands

The consumer appeal of global brands is rooted in both functional and emotional benefits. On the functional side, a global footprint of a brand is interpreted by many consumers as a validation that its product or service meets thresholds of quality, reliability, and consistency. Global brands also appeal emotionally to consumers who derive value from feeling like a global citizen. They feel more connected and worldly by consuming products and experiences that are part of, and even shape, global culture.

Another source of the appeal of global brands, lending both functional and emotional benefits, is the brand's place of origin. Where a brand originates can infuse it with either positive or negative meaning. For example, German auto brands benefit from the strong reputation of German engineering. Brands associated with Italian fashion, French luxury, Swiss timekeeping, and Korean and Japanese skincare gain positive association from their origins. Such brands can provide both strong reassurance of quality and the prestige of owning "the world's best". Other brands become physical symbols of their place of origin, allowing consumers to feel connected to a place. For example, Levi's and Budweiser have become symbols of the U.S., and many people across the world buy into those brands to be more closely associated with or to mimic American culture. Cities or neighborhoods can also be compelling places of origin for brands. For example, luxury brand Shinola's association with Detroit is a critical part of the brand's storytelling and provides the brand with blue-collar American values, while brands that are associated with Brooklyn, a borough of New York, are perceived as possessing the proper hipster pedigree, while brands that are associated with Silicon Valley, California or Bangalore, India play up their technological savvy.

However, consumers differ in the degree to which they value global brands. Research suggests that while a majority of consumers across the globe value the quality and image attributes of global brands, over 20% of consumers are either "anti-globals" (i.e., skeptical of the quality and value of global brands) or "global agnostics" (i.e., place no value either positively or negatively on the global-ness of a brand).[3] These shares vary across markets, with consumers in some being more openly hostile to global brands.

This hostility to global brands can arise from several sources. One is xenophobia, which has grown in conjunction with political populism throughout the world. Xenophobic consumers are more likely to gravitate toward brands of their own culture and reject those from unfavored others. For example, the populist sentiment around Brexit led some British consumers to boycott EU-based brands as Great Britain debated leaving the European Union. Geopolitical tensions between and among countries can also present challenges for global brands. For example, the global expansions of TikTok have met with significant resistance from government regulators in major markets such as the U.S. and India over concerns around national security, while China has either blocked or kept a tight rein on Google, Twitter, and Facebook within its borders. In general, anti-globalist sentiment has been growing steadily, fueled by critics who fear the growing threat of global trade on local job security and attribute it to a growing fear of Western cultural hegemony subsuming other cultures' values. The world's most valuable global brands, such as McDonald's and Starbucks, are often the ones most targeted by anti-globalist activism, boycotts, and protests.

Another challenge for global brands is generational. Younger consumers, perhaps because they have been impacted by growing income inequality around the world, appear to be more skeptical of capitalism and suspicious of the large companies and brands that are driving it. As a result, they prefer smaller, underdog brands and avoid patronizing the global brands they see as "top dogs," as a form of virtue signaling.[4] The concurrent rise of "local-vores" (e.g., advocates of the "buy local" movement) is another challenge to global brands and is helping to drive waves of new brands that tout their local origins as a way of signaling freshness (as in the farm-to-table movement) or environmental stewardship (due to their lack of carbon-heavy transport).

In light of this, local brands can of course benefit from the weaknesses of global brands. They do not face the same cross-cultural and cross-border political headwinds, and have a distinct advantage in their ability to focus on the needs, tastes, customs, and values of a specific market. For example, McDonald's and Burger King had a very difficult time entering the Vietnamese market because local competitors were far better suited to meet the tastes and customs of Vietnamese meal occasions. The checkered political and military history between Vietnam and the U.S. was another complicating factor for the two U.S.-based brands as they attempted to entice Vietnamese consumers. Research shows that small, local brands can benefit when facing a large, multinational competitor by framing the game as a competition between local and global.[5] In field and lab experiments, drawing consumers' attention to the presence of a large, often global competitor incites purchase activism, encouraging consumers to prefer and purchase more from a small, local competitor. For example, a small, local bookstore's sales increased as consumers purchased more items when a sign at the entrance highlighted the threat from large, multibillion-dollar corporations, while an independent coffee shop's sales went up the closer a Starbucks encroached on its territory. A third study showed that the Yelp ratings for small coffee shops increased the closer they were in proximity to a Starbucks location.[6]

The merits of the globalization of businesses and brands have been debated for decades. In 1983, HBS Professor Ted Levitt made a case in favor of globalization, claiming that consumer tastes were converging around the world and that it was inefficient for companies to localize their offerings.[7] His argument was further bolstered by Thomas Friedman in his 2005 book *The World is Flat*.[8] However, by 2001, Professor Pankaj Ghemawat cautioned managers against going too far in de-valuing local and regional differences in his *Harvard Business Review* article entitled, "Distance Still Matters".[9] The reality is that the optimal placement of brands on the global versus local continuum will depend upon several underlying conditions, such as the nature of the category in which a brand operates, the target consumers it serves, and the markets it enters. In an ever-changing world, this optimal position is a moving target as consumer preferences and competitive conditions evolve, as they inevitably do.

The Supply Side: The Advantages and Challenges of Global Branding for Companies

Brands with strong global stature are highly valuable to the companies that own them. They provide value on several important dimensions:

- **Brand equity**: Global brands that have strong reputations for quality, reliability, consistency, and aspirational value and thus, are highly valued by consumers. This equity can be a very strong competitive advantage and translate into strong financial returns.

- **Innovation**: The ability to source and scale innovation for global brands can be a strong competitive advantage. In addition, the R&D practices around global brands also benefit from the best practice sharing across markets that a global footprint allows. As a new innovation proves successful in one country, it can be quickly rolled out to others, following the same or a similar playbook.

- **Marketing effectiveness**: Broad-based awareness, understanding, and affinity across markets increases the impact of a brand's marketing efforts due to spillover effects across borders. A harmonized brand eliminates confusion as consumers move physically and digitally across borders; it attracts world-class partners that can enhance relevance (e.g., tapping into global culture creation industries such as sports platforms, music, movies, and television); and it enables the scale necessary for investment in proprietary branded content, platforms, and channels that establish direct relationships with consumers (e.g., direct-to-consumer retail or Nike's global football online communities surrounding the FIFA World Cup).

- **Efficiency**: Global brands can increase efficiency on multiple levels. It yields portfolio and marketing efficiency by leveraging similar products and marketing campaigns across markets. It provides operational and supply chain efficiency by allowing a focus on fewer brands. And, it provides R&D efficiencies by leveraging investments over multiple markets.

- **Speed**: Global scale allows for rapid roll out of new products and marketing experiences.

- **Talent**: Global brands with strong equity provide companies with a stronger ability to attract world-class marketing talent.

For all of these benefits, global branding is also fraught with complexity. The differences across markets in consumer tastes, culture, values, language, competition, regulation, and other dimensions present significant challenges for companies in building and managing global brands:

- **Brand positioning:** Maintaining different brand positions and/or competitive strategies across markets introduces significant complexity in global brand management. Budweiser, for example, maintains a premium position in China, but is competitively positioned as a mass market brand in the United States. As it expands its operations into other regions of the world, it must decide which price position to use in various countries and regions.

- **Brand storytelling:** Striking the right balance between global consistency and local relevance can be quite tricky when it comes to marketing communications. At what point does a universal brand message become too broad to be uniquely relevant? While some researchers proclaim that humans demonstrate universal needs (such as the need to belong) that can be supplied by the use of common stories or metaphors,[10] others argue that culture matters and that the most iconic brands in history have helped assuage specific cultural tensions that arise in a particular culture or subculture during a particular time, making it difficult to imagine executing cultural branding strategies across borders.[11]

- **Organizational complexity:** Orchestrating large teams across markets in service of a single brand is complicated. The organizational processes, structures, and governance models must enable the appropriate balance between global consistency and local relevance. There are also challenges related to culture and mindset of global managers. Global brands invariably involve some degree of central coordination and direction, which can be perceived as a threat to local manager autonomy, creating organizational friction.

- **Trademark protection and litigation:** The emergence of copycats and counterfeits to global brands require vigilance around trademark protection, which can be expensive to obtain and defend across multiple markets. Luxury brand Supreme ran into legal difficulties defending its brand trademark against "legal counterfeits" in Europe after its failure to file for trademark registration in several countries allowed competitors to exploit its brand. Braun gave up significant sales and market share after competitor Conair benefited from the company's misstep of not filing for patents on its Supervolume hair dryer in North American markets by copying its designs. After winning a trademark lawsuit against fellow luxury brand Yves Saint Laurent in the U.S. that secured its right to protect its signature red soles on its shoes, Louboutin then had to go country-by-country to assert its claim. While some countries' courts agreed with the U.S. court, others did not, leaving the brand exposed to trademark infringement in important countries including France.

- **Operational complexities:** The translation of packaging and marketing materials across multiple languages adds cost and complexity and is fraught with opportunities for errors. Some of the most egregious and sometimes hilarious global branding fails in history derived from faulty translations or a lack of knowledge of local slang terms (e.g., KFC's English slogan "Finger lickin' good" translated to "Eat your fingers off" in China; the Swedish vacuum cleaner brand Electrolux entered the U.S. with the slogan, "Nothing sucks like an Electrolux"; and Coors beer's "Turn it loose" slogan translated to "Suffer from diarrhea" in Spanish). Further complicating matters are market-specific regulations and requirements, which make harmonized packaging across markets challenging to implement. For example, Canada requires the equal treatment of English and French languages on its packaging and marketing communications. This makes it difficult to harmonize packaging across North American markets, where the U.S. market with its desire to prominently display English language text, dominates the much smaller Canadian market. Regulations can also vary across markets in everything from product safety to digital privacy, adding cost and complexity for global brands. The EU's General Data Protection Regulation (GDPR) for protecting consumer privacy are some of the strictest in the world, and have caused North American companies to have to tighten their procedures for handling consumer data.

- **Supply chain challenges:** Brands operating global supply chains can encounter risks around authenticity (e.g., when consumers protest that Apple touts that its products are "designed in California," but are manufactured in China), and reputation (e.g., Nike's challenges with workers' rights violations in Southeast Asian sweatshops in its supply chain). Becoming a global brand may also jeopardize benefits from government regulation or distribution partner policies that favor local brands. For example, many brands maintain local manufacturing despite the fact that it might be more expensive to be able to benefit from their channel partner Walmart's preference for "made in the U.S.A." brands.

- **Increased transparency:** The rise of social and digital media platforms that operate globally make brand inconsistencies in messaging and offerings across markets more visible. This places more pressure on increased uniformity in product, pricing, and/or communications, which can undermine efforts to tailor strategies and messages to specific markets. It also increases accountability as the visibility to mistakes or problems is amplified. This brings heightened risk of a brand crisis in one market contaminating the brand more quickly around the world. Due to a series of controversies around the Uber brand in 2017, the #DeleteUber hashtag appeared in more than 37,000 Twitter posts in less than two months, which generated over 296 million media impressions across the globe.[12]

A deep understanding of the demand and supply side issues associated with global branding becomes critical to effectively managing global brands.

Managing Global Brands

Several factors will influence critical choices around managing global brands and yield three fundamental questions that managers must answer as they plan global brand strategy:

1.) What is the optimal balance between being globally consistent and allowing local customization to maximize brand relevance across the globe?

2.) What is the optimal way to expand a brand across markets, considering the various elements of the marketing mix?

3.) How should global brands be managed over time?

Striking the Optimal Balance between Global Consistency and Local Customization

Market conditions heavily influence the choice of how globally consistent versus locally customized the brand identities, strategic brand positioning, brand stories, offerings, and marketing of global brands should be. Specifically, consideration must be given to the nature of the category in which a brand operates, its target audience and consumers, and the general characteristics of the market.

Category Characteristics. Several characteristics of a brand's category will influence choices around how globally consistent versus locally customized brands should be expressed across markets. One is the degree of uniformity in consumer tastes and preferences in the category across the world. Categories such as food, beverages, and fashion tend to have more localized and culturally sensitive tastes, requiring brands to engage in more local or regional customization of offerings and messaging. For example, McDonald's customizes its menu items in India to eliminate beef and pork and add more vegetarian options, while Starbucks places more emphasis on tea (and less on coffee) in China and Japan. Conversely, categories such as technology, durables, and toys tend to experience more similarity in consumer tastes across markets, and can benefit from more globally consistent positions.

There are many examples in which miscalculations about the degree of uniformity in category tastes and usage across markets have proven costly to brands. German brand Braun once marketed a heated hairbrush to women globally, promoting it "for those days when you don't wash your hair." That positioning was not set up to succeed in the U.S., a market in which women routinely wash their hair every day. American brand Gillette initially struggled to determine how to market its women's razors in countries such as Germany, in which women's hair removal was not as prevalent as in the brand's home country due to the lighter hair color of many citizens, or in Mediterranean countries where shaving was less prevalent than other hair removal methods, such as waxing or mechanical epilation.

As it moved across regions, Gillette needed to change its U.S. positioning, which focused on "a better razor," to promote primary demand for the hair removal category in Germany, and to touting its products as faster than and less painful than waxing and epilation in Spain, Italy, and other countries.

Another critical factor is the degree of the development of the category. Highly developed categories in key markets, with well-established players and/or high levels of commoditization, will likely require more local differentiation. For example, value brands typically have a more difficult time expanding globally because local competitors have already saturated the lower end of the market in many categories. Walmart has been challenged by this dynamic in its market expansion strategy. This may have been a contributing factor to Walmart exiting the German and South Korean markets less than ten years after initial entry. It also likely led to a later focus on joint venture and acquisition as core elements of its global expansion strategy.[13] Conversely, Google's early-mover advantage in the search engine market allowed it to quickly scale with a uniform offering and branding across markets before local competitors could establish a foothold. However, by the time Uber and Lyft attempted to penetrate the Chinese and Indian markets, local competition from Didi in China and Ola Cabs in India had already garnered significant market penetration and consumer loyalty and made it more difficult for the American brands to gain a foothold. Amazon has struggled to establish its brand in India and China due to the dominance of Flipkart and Taobao in the Indian and Chinese e-commerce markets.

Differences in the degree of category interest, engagement, and involvement of consumers should also inform how globally consistent versus locally customized global brands and offerings should be. Higher levels of category interest allow more opportunities to drive differentiation and loyalty, and often place a higher premium on the "global-ness" of a brand. The technology sector is a good example of this, in which brands like Apple and Nintendo can sustain more uniform global positions, offerings and messaging. On the flip side, lower interest categories (e.g., chewing gum) tend to be populated by more local or regional brands as opposed to truly global brands. The more transactional nature of consumer relationships in these categories places less value on the emotive and functional differentiators of global brands, lowering the barriers to entry for local players.

Finally, the ability to distinguish a brand on functional benefits and attributes within a category is another important factor in determining the degree of global consistency a brand should have. A high ability to do so allows for more uniformity in messaging and offering because functional/utilitarian value claims travel more easily than ego-expressive, symbolic, social, or experiential value claims, which tend to be more culturally-specific. For example, the higher level of product differentiation for LEGO offerings within the toy market is one of several factors driving a more consistent brand position and product portfolio across markets. However, brands in the liquor and fashion categories, for example, will likely be more challenged to do so if their brand positioning relies upon ego-expressive values such as masculinity, which might vary significantly in how it is expressed across cultures. It is important to emphasize that this is not a hard and fast rule: brands such as Coca-Cola and Mastercard are strong global brands despite the challenges of differentiating functionally in the soft drink or credit card categories, respectively. They compensate for this by tapping into universal emotional needs (e.g., Coca-Cola with belonging and happiness, and Mastercard with enabling precious moments together), while tactically localizing as necessary. A strong ability to convey and substantiate functional/utilitarian value claims can be an enabler to a more globally consistent brand.

Consumer Target Characteristics. Consumers' appetite for global brands varies across markets and cultures. However, even in markets that are generally less receptive to global brands, there are segments of consumers who are open to and prefer global brands. Categories in which target audiences that are more cosmopolitan and well traveled (physically or virtually) tend to place a higher value on the "global-ness" of brands. Brands catering to these consumers therefore have the opportunity to deliver more uniform messaging, offerings, and expressions of the brand across markets.

The purchasing power of a brand's target consumers is another important consideration. Premium brands may find it more challenging to enter into emerging markets in which a smaller share of the population has the purchasing power to afford premium prices. This leaves such brands with a few competitive positioning choices. One is a "skimming" strategy, in which the brand maintains a premium price and position, and thereby targets only the small share of the population to whom it is relevant, sacrificing volume for profitability. A different strategy is to maintain the brand's premium position and offering, but to lower the price to appeal to a broader share of the market by making it more accessible, trading profitability for volume. This introduces the risks of diminishing the brand's premium image and inciting cross-market arbitrage as the price gap among countries grows large and entices people to buy in one country, ship across borders, and resell in another.

In general, firms try to price their products "equally" across markets, using the concept of purchasing power parity, in which the firm maintains a constant ratio between the price of the good in a particular market to the absolute purchasing power of that country's currency in order to avoid cross-market arbitrage. Firms like McDonald's can deviate its prices from purchasing power parity due to the perishability of its offering which makes it difficult to transfer product across countries. However, companies like Gillette face significant gray market arbitrage risk if it does so, given its high value, low weight product which makes it easy to transport across borders, providing the opportunity for arbitragers to buy low in one market and sell high in another.

These risks can be avoided either by not launching in a particular market at all if the brand's premium image cannot be supported by a high enough price point, or by introducing an entirely different brand for such markets, thereby eliminating the opportunity for a low priced option to contaminate the premium brand. Both of these options necessarily limit the global footprint of the brand, but the loss in efficiency may be a better choice than the potential loss of brand equity. Some companies leverage differential quality product lines to address differences in purchasing power, placing lower quality goods in markets with lower ability to pay and higher quality and higher priced goods in markets with more liquidity. Others change packaging configurations to lower the out-of-pocket cost of goods for consumers in some countries. For example, Hindustan Lever, Unilever's local subsidiary in India, packages its personal care products in single-use sachets rather than multi-use bottles to provide a more accessible price point to lower income consumers.

Market Characteristics. Expanding a brand's footprint across markets requires careful consideration of the dynamics of each country or region into which it enters. Another typical pitfall of market entry strategies for brands are structural market impediments. Limited distribution, media, or marketing partnership opportunities either can inhibit the ability to establish a brand in a market, or can make it prohibitively expensive to do so. For example, less developed retail and media channels in emerging markets can present challenges for global brand expansion.

Distribution channels that are highly fragmented or relatively unsophisticated in retailing and merchandising make it more difficult and/or expensive for global brands to build a position in a market and may require a different marketing strategy and profitability targets. Conversely, the presence of large, sophisticated and multi-national retailers (e.g., Tesco, Carrefour) in a given market can accelerate global brand expansion as companies can leverage their relationships with the retailers in other markets to persuade them to collaborate with them in new markets. Global brands tend to have a value proposition well suited to the needs of these retailers, which relies on a combination of value in margin, inventory turns, marketing/trade spend, and sophisticated channel management. The global growth of e-commerce can also aid the market expansion of large global brands, which benefit from scale and expertise in that particular channel. Brands used to operating in markets with well-established distribution channels often stumble as they enter emerging markets that have underdeveloped transportation supply chains. For example, as Zalora, a global e-commerce marketplace, launched into the Philippines, it had to find an innovative solution to the country's "last-mile problem" to enable home delivery of its packages to remote rural villages where modern supply chain solutions did not reach. Hindustan Lever struggled to penetrate India's rural villages until it launched its innovation Shakti program, which relied on local female entrepreneurs to sell its products to their neighbors from their homes.

On the media side, the growing influence of global digital media platforms can also enable the market expansion of global brands. Platforms such as YouTube, Twitter, Facebook, Instagram, TikTok, and others make it easier for global brands to drive awareness and interest across markets rather than working through market-specific local channels. Also, digital streaming (e.g., Netflix, Disney+) and gaming platforms (e.g., Fortnite, ROBLOX) with strong global footprints have a similar influence. Global sports properties, such as the Olympics, Formula 1, and the FIFA World Cup, offer cross-country media synergy opportunities for global brands. China, however, presents a unique challenge to global brands because while the digital retail and media channels there are very well developed, most are largely unique to the Chinese market or Asian region.

Another market characteristic to consider is the nature of competition within a given market. Naturally entrenched players within a given market may require that a global brand employ a strategy that is more specific to that market (or even reconsider entering the market altogether). A strong local brand may have trumped a global brand's competitive advantage or may be competing on a functional attribute or emotional appeal that a global brand cannot match. Local brands may use more comparative advertising that directly challenges a global brand, requiring a more specific and targeted messaging approach to combat it.

Finally, government regulation is another critical factor to consider in expanding a global brand's footprint. Laws that favor local brands and companies, or that place significant constraints on how global brands operate, such as requiring joint ventures with local companies, will significantly influence market expansion plans for global brands. The limited presence of U.S. based digital media and retail platforms (e.g., Amazon, Facebook, and Google) in China is a clear example of this. Legal enforcement against counterfeiting and laws pertaining to intellectual property protections often preclude brands from entering certain countries.

Expanding a Brand across Markets

Expanding a brand's footprint across markets is a challenging endeavor. Unfortunately, there can be many causes of market entry failure, illuminating the difficulties of global branding. One common cause is an insufficient level of understanding of the particular market or culture, including:

- Consumer and cultural dynamics: Each culture has developed over time its own archetypal plots and characters. Brands that tap into archetypes from one country may find that their brand stories fall flat in another. For example, underdog brand stories perform well in Western countries, but may be less compelling in more communal and interdependent cultures.[14] Words, symbols, and even colors have different meanings in different cultures. Some of the greatest fails in marketing history involve the use of inappropriate symbology, such as when baby food brand Gerber launched their signature packaging with a baby on its label in Ethiopia, a market where, customarily, the pictures on product labels signify what is actually inside the package, given that many consumers cannot read. Or, when Nike recalled thousands of products when a symbol intending to signify fire on the back of shoes instead resembled the Arabic word for Allah. Successful market entry requires strong cultural anthropology skills, to help create "meaningful" brands in another culture and language (both linguistically and symbolically).

- The competitive context: An ill-informed competitive strategy can prove fatal. Well-entrenched, or also unsophisticated, local competitors could set market benchmarks on pricing or offering that are unsustainable for global brands primed for higher hurdle rates or facing higher costs of capital.
- The economics of operating in a particular market: These could be influenced by pricing pressure or the high costs of doing business in a country, which could lead to margin erosion that inhibits a brand's ability to compete.
- The regulatory environment: Detrimental regulations or government arrangements favoring local competitors could prove insurmountable or unprofitable for global brands.

Another cause of failed market entry can be the mindset of brand managers. Ethnocentrism often results in cultural bias or relativism that leads to offerings or communication that fail to resonate (or even worse, creates backlash) with local consumers. In 2018, the Italian fashion brand Dolce & Gabbana was forced to cancel a high profile fashion show in China hours before it was scheduled to start because of videos that it had posted to social media promoting the show that were deemed insulting and insensitive to Chinese culture. An obsession with efficiency and standardization can also lead to the same results. Perhaps it was one or both of these reasons that led Walmart at one point to carry snow shovels in Mexico City, where average temperatures are well above freezing during the winter.

Related to this is also the inability of a brand's existing meaning to translate across cultures. When luxury brand Shinola expanded from the U.S. into European and Asian markets, the company expected that its brand narrative, anchored in its place-of-origin (the city of Detroit), would resonate with a global audience. Unfortunately, many consumers in overseas markets associated Detroit primarily with the auto industry (which had little connection with the brand's core offerings of premium watches and luxury goods), and even worse, with urban decay based on the city's high-profile bankruptcy declaration in 2013. This gap between the brand's desired identity and the received brand image in the minds of consumers led to an ill-advised market expansion and forced the brand to rely less on its city of origin story as it marketed overseas.

When expanding a brand across markets, key considerations across the marketing mix include:

- **Pricing:** Consider the impact of price on the positioning of a brand. For example, premium global brands that employ mass market pricing as part of a market entry strategy could undermine that position. Also, pricing should be one of the more consistent parts of the marketing mix across countries. Variation in pricing and trade terms across markets tends to lead to arbitrage and the establishment of gray markets for goods, accelerated in recent years by globalization, digitalization, and e-commerce.
- **Distribution:** Consider the role of distribution channels and partners in establishing a brand's position. This requires strict understanding of the capabilities required (e.g., last mile fulfillment, payment processing, advertising vehicles, government relations, etc.) and how to evaluate partners against them. Some global brands have also established strong footholds in markets by establishing their own branded retail channels. The LEGO

Group's strong position in the Chinese toy market was built in part via its own branded e-commerce and brick and mortar store footprint, which now includes over 350 LEGO branded stores throughout China. This was instrumental in penetrating a market with low awareness and understanding of the brand. Effective market-entry distribution strategies could lead to a variety of business arrangements (e.g., traditional third party retail, joint venture, license and franchise deals, etc.), depending on the market and the brand strategy.

- **Offering:** Consider the degree to which the offering might need to be locally customized. As mentioned above, brands operating with more highly localized tastes (e.g., food, fashion) will likely require more customized offerings to be relevant. The incremental value of this must be weighed against the trade-offs in operational complexity that come with an expanded global product portfolio.

- **Positioning, Storytelling, and Messaging:** Consider the need for customized messaging and positioning across markets. External factors (e.g., varying consumer tastes, retail and media channels, competitors and regulatory environments) may require this, as could the stages of brand development across markets. For example, new markets in which a brand's awareness and/or category or brand understanding are low will likely require different brand communications than those in which the category and brand are more established.

- **Brand Partnerships:** Consider the role of partnerships in establishing a brand across markets. Marketing, media and licensing partners can prove to be extremely helpful for brands in establishing awareness, achieving a desired positioning, and providing access to and influence over target audiences. These could differ across markets for the same reasons that messaging and positioning might: differences in consumer tastes, retail and media channels, competitors, regulatory environment, and stage of brand development. Partnerships with other global brands can help to reinforce the "global-ness" and stature of a brand, but partnerships with market-specific brands, media platforms and properties, and distribution partners can be instrumental in driving local relevance.

Managing Global Brands over Time

Critical choices are presented to global brand managers at various life stages of the brand – both globally and within specific markets. Being deliberate in evolving the footprint, messaging and position of a brand over time and across markets is very important. When establishing new brands, companies should think global from the beginning. Even if initially launching a brand into only one market, future ambitions may involve global expansion. In such a case, brand managers should avoid making decisions that will constrain or complicate movements of a brand across borders later in its lifecycle.

Moving too quickly or slowly in expanding across markets can be very damaging to a brand and jeopardize its long-term value. Moreover, managing different positions of the same brand across markets is often very challenging to sustain. KFC has become one of the largest restaurant brands in the world, aided by a highly localized strategy. However, this has resulted in very different brand expressions, offerings and positioning through the globe. Large variations in restaurant formats (e.g., larger eating areas in China to accommodate large groups), restaurant experience (e.g., premium experience delivered by staff trained in high service and culinary arts in Japan), and menu (e.g., different offerings across markets, such as burgers, hot dogs, breakfast, and even a vegetarian menu in India, etc.) make it challenging to sustain a harmonized brand identity, manage growing complexity, and leverage best practices and efficiencies across markets.

The choice around pace of expansion involves both internal and external considerations. Internally, a company must realistically assess its capabilities and resources to successfully scale a brand across markets. Externally, consideration must be given to the competitive environment in which a brand operates. This has never been more important, as the pace of globalization and digitalization has made first-mover advantages more elusive and less sustainable in many categories. For example, Rocket Internet is a company employing 25,000 people across 100 countries with the intent of copying successful American companies in e-commerce, digital marketplaces, and financial technologies in markets outside the U.S. This is a formidable threat to brands in these spaces with ambitions to expand globally. The pace of global expansion for brands will, therefore, be influenced by the nature of the competitive environment and the corresponding urgency in establishing first-mover advantage. The more formidable and defensible a brand's global competitive position, the more that it can set its own pace for expansion. For example, global brands with strong scale and well-established network effects have a strong defendable position against Rocket Internet in the categories in which they compete. Likewise, Netflix has been able to expand globally while encountering limited threats from smaller local competitors due to the strength of its scale and network effects.

Another critical choice is around evolving a brand's positioning, offering, and messaging over time. Brand messaging may need to evolve depending on the state of awareness and understanding of a brand in a given market. Messaging might also need to evolve as category perceptions do. Leading brands in some categories may benefit from messaging that promotes the entire category, and not just its own brand, i.e., following a practice of priming primary demand for a category before promoting secondary demand for a particular brand. The LEGO brand has faced this issue in markets such as China and Korea, where parents have historically placed less value on toys and free play, which can be viewed as more of an indulgence relative to experiences focused on scholastic learning. Therefore, The LEGO Group had to first work to change perceptions about the toy category in these markets. A new generation of parents in these markets may be shifting to value the importance of toys and play in developing critical skills such as creativity and collaboration due to the efforts of the LEGO brand and its competitors. If this progresses, the optimal mix between category and brand building in messaging will likely change.

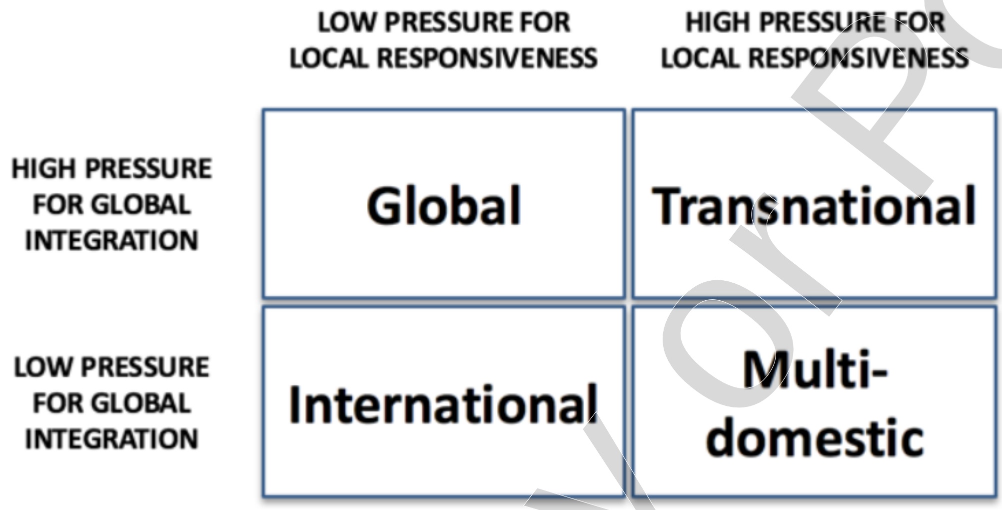
Changing market conditions may also require the evolution of a brand's offerings over time. Brand extensions could be required to stretch a brand either up-market or down-market in response to changing economic or competitive environments. For example, as competitors' coffee and service offerings began to approach the quality level of Starbuck's thereby diminishing the brand's competitive advantage in its core stores in the U.S. market, the company moved upmarket and launched Starbucks Roasteries, featuring experienced baristas operating sophisticated coffee-making machines in a theater-like restaurant atmosphere. Conversely, as Chinese consumers began consuming more coffee, Starbucks moved downmarket to open Starbucks Now, express retail stores that prioritize fast service.

Brand architecture may require adjustment over time as well. Over the years, Unilever acquired a very large portfolio of local and regional ice cream brands. In 1998, it introduced Heartbrand, which is a brand umbrella under which over twenty of these formerly local brands now sit. This was done to drive stronger cross-market brand awareness and synergies in manufacturing and marketing.

Mobilizing Organizations around Global Brands

Effectively managing a global brand involves striking the optimal balance between global integration and local responsiveness, given the context in which the brand operates. A well-known strategy framework based on these two dimensions helps illuminate firms' strategic options for managing global operations and brands (see **Figure A**):[15]

Figure A Two forces help determine the choice of a global branding strategy



Source: Bartlett, Christopher and Sumantra Ghoshal (1989) *Managing Across Borders: The transnational solution.* Boston: Harvard Business School Press.

The degree of pressure for global integration will be based on several potential needs: to leverage global stature and quality signals of a brand, to realize costs savings or efficiency gains, and to build and retain core competencies across markets. The pressure for local responsiveness will be influenced by consumer tastes and preferences, and the nature of the competitive environment across markets. The position of a brand's context on each of these dimensions will lead to a specific model for optimally managing brands across markets. The four models are:

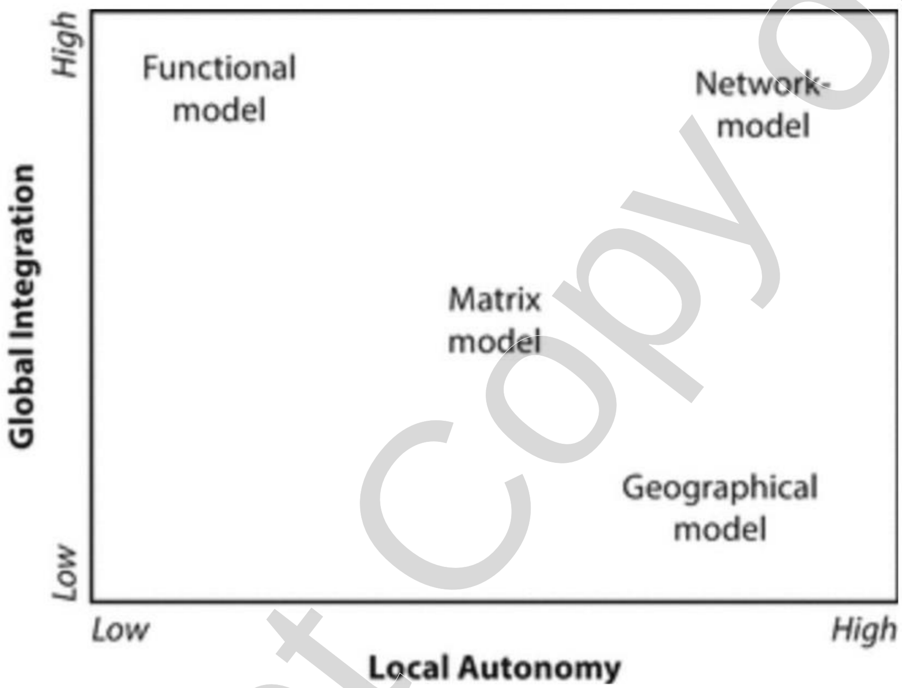
- **Global Branding:** High pressure for globalization combined with low pressure for local responsiveness demands a uniform and highly centralized approach to managing brands across markets. Pfizer and Caterpillar are examples of brands that have adopted this model.
- **Transnational Branding:** High pressure for globalization combined with high pressure for local responsiveness demands a more flexible (and complex) model. This involves maintaining strict global consistency in some elements of the marketing mix (e.g., brand identity, positioning, values), while allowing for more local flexibility in others (e.g., messaging and product offering). This model also involves a higher degree of sharing of expertise across markets (e.g., technology, talent) relative to the Global model. Unilever, Starbucks, and Coca-Cola are examples of brands adopting this model.
- **Multi-Domestic Branding:** Low pressure for globalization combined with high pressure for local responsiveness demands a highly decentralized model of operating. Nestlé has adopted this model.
- **International Branding:** Low pressure for globalization combined with low pressure for local responsiveness is common for brands and companies selling a uniform product in many markets, but only producing in one. Wine brands and other exporters are examples of brands that adopt this model.

Key enablers of these models are organizational structure, governance, culture and mindset, and talent management.

Organizational Structure

Researchers adapted Bartlett and Ghoshal's model to specify four organizational structures that support global brand development based on the need for global integration versus local responsiveness.[16] **Figure B** shows a mapping of the four organizational structures on the two dimensions.

Figure B Global Branding Strategies Dictate Differential Organizational Structures



Source: Steenkamp, Jan-Benedict (2017) *Global Brand Strategy: World-wise marketing in the age of branding*, New York: Springer.

Geographic Model. This structure anchors around regions and markets. It is highly decentralized, consistent with the strong need for local responsiveness and low need for global integration. The primary benefits yielded are speed and agility to maximize local relevance. On the flip side, it typically comes with trade-offs in economies of scale and scope, brand consistency across markets, and knowledge sharing between units. **Exhibit 2** provides a visual depiction of each organizational structural model.

Functional Model. This structure is focused on driving stronger global integration and consistency. As such, it ensures stronger brand consistency, cost efficiency, and allows for more rapid new product introduction – usually at the expense of local responsiveness. It is more centralized, with more authority being granted to headquarters over local business units.

Matrix Model. The matrix model does not favor either geography or function. Instead, it forces the necessary collaboration and trade-off discussions across functions and geographies for brands requiring a mixture of global integration and local responsiveness. While it can drive more balanced and optimized decisions, it can also lead to complexity and churn that can limits an organization's ability to act with speed and agility.

Network Model. This structure is an alternative to the Matrix Model for brands requiring a high degree of both global integration and local responsiveness. To address the weaknesses of the Matrix Model, it relies less on hierarchy and more on ways of working. This includes operating systems (e.g., global management information systems), cross-functional and cross-geography decision forums, and cultural norms placing a high premium on collaboration.

Governance

Effectively mobilizing organizations around global brands requires clear governance in at least three key areas:

- **Decision rights:** A clear definition of decision rights (i.e., who decides and for which types of decisions?) is critical to minimizing churn, inefficiency, and ineffectiveness in execution. Rights should of course align with the desired organizing model. For example, decision rights should rest centrally at headquarters for brands that place a higher premium on global consistency and integration. Clarity around this, and the specific individuals accountable for specific decisions, is essential.

- **How decisions are made:** The establishment of clear decision-making processes and forums is also critical. This is particularly important for the Network Model, which relies heavily on collaboration and shared responsibilities across functions. A key enabler to these forums is a well-established global brand planning process, with uniformity in vocabulary, analytics of the external environment, brand equity measurements, and best-practice sharing. Another enabler is aligned incentive structures across global, regional, and local teams to ensure that decisions support the overall brand ambitions.

- **Guardrails on brand execution:** Clear mandates around how the brand shows up are critical in maintaining brand integrity. This can apply to guidance around visual identity, brand partnerships, consumer privacy, and brand safety (e.g., regulations on safe media placement for the brand), among others. Some brands also explicitly stipulate "experience principles," outlining the required characteristics of any experience delivered by that brand. Naturally, these guardrails should support the organizing model, e.g., being more prescriptive for those brands requiring stronger global integration.

Organizational Culture and Mindset

The degree to which a brand's experiences, offerings, and messaging reflect its values and promises is heavily influenced by the culture and mindset of its organization. These involve the shared values and behavioral norms that influence how things are done in an organization. Cultures that reflect the brand's purpose, and reward behaviors and values that support it can be a very strong enabler to building strong global brands. The focus on athletic performance at Nike or social justice at Ben & Jerry's are good examples of this. At The LEGO Group, the fundamental belief is that "children are our role models" – i.e., that employees should exhibit childlike curiosity, imagination, and creativity in their daily work. The ability to establish strong cultures around a brand's purpose can be especially powerful for mono-brand companies (e.g., Apple, Starbucks, and Nike) or autonomous sub-divisions of multi-brand companies (e.g., Ben & Jerry's, Supreme). Such cultures can be particularly helpful in building and managing global brands across many markets.

In establishing organizational cultures around global brands, consideration must also be given to cultural traits of specific markets. For example, some cultures value more egalitarian working models while others favor more hierarchical working models. This can present challenges for global brands attempting to establish a single organizing model around the world. A brand's country of origin can also influence the organizational culture supporting a brand. If the leadership of a brand's organization is heavily populated with people from the home country, the cultural traits of that country will likely shape the organizational culture of the brand. The size of the home country can also matter. As Ghemawat claims, "Businesses and executives from small home countries, for instance, are more accustomed to dealing with cross-border differences than those from large home countries."[17] Conversely, he says that Americans, less likely to have lived abroad and less likely to speak another language other than English, are more likely to project their values to other markets, which could inhibit their ability to locally adapt as necessary.

Finally, researchers point to the importance of a brand's "organizational identity" in global expansion.[18] Kellogg's entry into India was complicated by its organizational identity as a "breakfast cereal" brand. Kellogg's successfully established itself in Western markets as a convenient, timesaving breakfast option. However, in India, large morning meals are customarily cooked and served hot, so positioning cold cereal as a convenient and time-saving option for breakfast was less relevant and more confusing in that market. If only Kellogg's had originally positioned its cereals as an after-school snack for Indian children when it launched, it may have had an easier market entry.

Talent Management

How companies manage talent is another critical element of mobilizing organizations around global brands. This plays out both in the recruitment and development of talent.

Attracting the right talent is critical to building and strengthening global brands. Companies with such aspirations must place strong focus on building a diverse talent pool, representing a broad range of cultures and backgrounds. This is important not only for building the curiosity and empathy for crafting relevant brand messaging and offerings across markets, but also for collaborating effectively internally with employees across cultures and geographies. Strong global brands should also leverage their global brand strength in attracting top talent across the markets in which they operate.

However, recruiting the right talent is not enough. Talent development and leadership play a critical role as well. Specifically, a strong global brand organization must also place heavy emphasis on establishing and valuing an inclusive environment in which the diverse talent thrives. This will likely involve cultural intelligence training and deep leadership commitment to such an environment. More broadly, developing and valuing competencies such as empathy, collaboration and curiosity in all employees will be essential in building a strong global brand. Finally, career paths must be structured to provide future leaders with a strong mix of experience across global, regional, and local roles. This should also include substantial assignments across geographies that allow managers to live outside their home countries for extended periods of time. Barring that, global managers should expect to spend a lot of time on the road; for example, AB InBev's Brian Perkins, vice president of global marketing for Budweiser, estimates that he spends 40% of his time outside of his home market.[19]

The Future of Global Branding

The context in which global brands operate is changing in meaningful ways. Many factors will influence the future of global branding, including digitalization, shifting consumer sentiments, and geopolitical dynamics.

The rise of e-commerce (and the rapidly accelerating adoption of it fueled by the COVID-19 global pandemic) is one development that will have substantial implications for global brands, providing tailwinds for brands with global ambitions. Multinational e-commerce platforms can help brands expand their geographic footprint more quickly with less capital investments required. Such platforms also provide strong opportunities in merchandising and marketing to build brands across markets. They are becoming powerful media channels in their own right, and there are increasing options for creating viable branded direct-to-consumer retail in e-commerce (e.g., via Shopify and Amazon Marketplace platforms) without a physical presence in a market. With that said, the rise of e-commerce also presents headwinds for global brands as well. It increases competition by reducing barriers to entry versus traditional physical retail, due to the digital efficiency of offering a long tail of inventory. And, online marketplaces often allow copycat brands and counterfeits of global brands to thrive, despite the platforms' best efforts to police them.

Digitalization has also brought the rise of consumer communities and the practice of co-creation between fans and brands. Digital platforms such as YouTube, TikTok and other social media platforms, gaming metaverses (e.g., Fortnite, Minecraft, ROBLOX), and branded apps allow consumers to form physical and virtual communities around brands, properties, and shared passions. They allow brands to deliver content directly to their fans to deepen engagement and loyalty. Digital platforms also allow brands to co-create with fans around product offerings and content. For instance, LEGO Ideas is an online platform in which fans submit ideas for subsequent LEGO product launches. Global brands with scale can leverage all of these opportunities quite powerfully. However, these opportunities also pose challenges. As fans from all over the world connect with each other around a brand, they gain collective bargaining power and participate in negotiating the meaning of "their" brand. Different meanings in different cultures and markets can create tensions for fans and brands themselves. It could also put more pressure on global brands to create more uniformity in their positioning and messaging across markets to avoid discrepancies in meaning from being aired and debated in online forums. In addition, these large global fan communities provide a global consumer network with more influence over brands and how they operate. Companies must develop the capacity and capabilities to effectively manage the direct relationships with and among these fan communities.

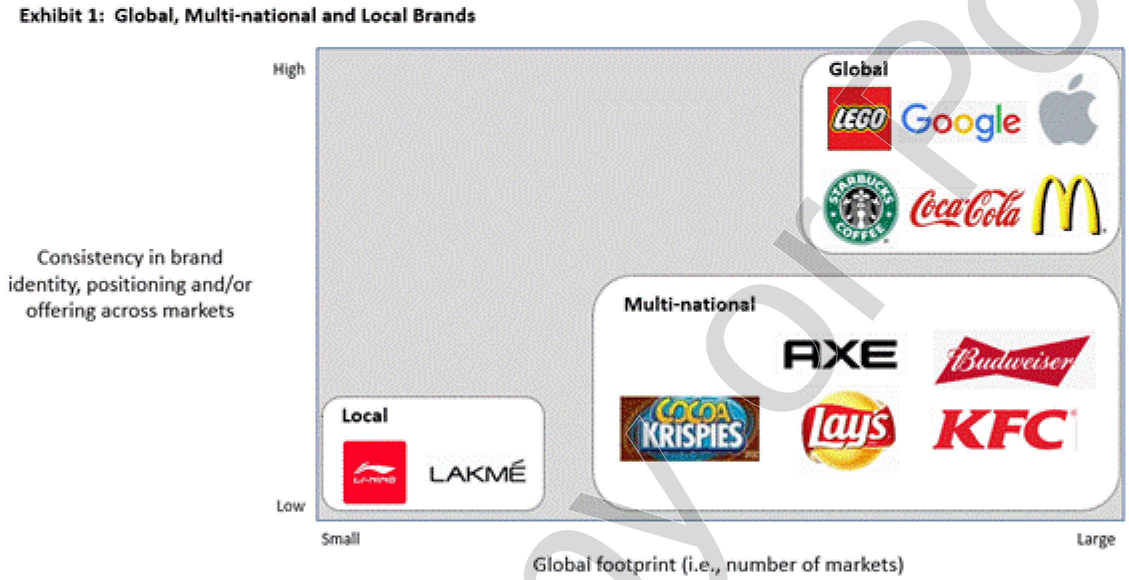
Another emerging dynamic for global brands is the battle for more direct consumer relationships. The growth of large digital media and retail platforms (e.g., YouTube, Tencent, Facebook, Amazon, Google, Baidu, Tmall, and Netflix) has created a shift in power and influence from large consumer brands to these platforms. Increasingly, brands are at the mercy of these platforms, as they become very powerful intermediaries between brands and their consumers and shoppers. Some large global brands are fighting back, making bold choices and investments in their own branded ecosystems of touch points, in order to establish more direct, richer, and longer lasting relationships with their fans. This option is often available to a more limited set of global brands with very high brand affinity and extensive financial resources, given the high emotional engagement required of customers and the large capital and human resource investments required of firms. One example is Nike, who has placed significant investment and focus into its own branded global retail channel. That channel grew as a share of Nike's sales from 16% in 2011 to 35% in 2020.[20] In the process, Nike made a bold choice to pull Nike products from Amazon's e-commerce marketplace after a brief test. Disney is another example, having invested billions of dollars to establish its own streaming platform in Disney+ rather than rely on other media intermediaries to deliver its streaming content to consumers. In the process, Disney made the bold choice to pull all of its proprietary branded content from Netflix, and, as a consequence, accepted the temporary loss of significant reach and licensing fees. These examples are outliers in their boldness, but global brands will increasingly need to relate to the challenges posed by this power shift toward large digital media and retail platforms.

Shifting consumer sentiment is also re-shaping the landscape for global brands. Younger consumers are demanding more of brands and expect them to espouse values and support social and environmental causes. Yet, disparate value systems, ideologies, and cultural sentiments present challenges for global brands in taking uniform stances on issues across the globe. For example, when Nike featured African American football player Colin Kaepernick as the face of its *Just Do It* campaign in 2018, the response was largely positive among its target audience in the U.S., who saw him as a warrior in the social justice wars after he took a knee during the American national anthem in protest of racial inequities. However, he did not resonate as strongly as a brand spokesperson in other markets where the cultural significance of his actions in light of the U.S.'s history of slavery and the continuing challenges of the Civil Rights movement were not as well known by non-Americans. Asian car brands have been quick to publicly embrace LGBTQ+ rights in the U.S., but more slowly in their home markets where there is less open public support for that particular human rights issue. In an age of digital transparency, it may be challenging for brands to take different values-based stands in different markets and those that do may be called out by consumers as hypocritical.

Finally, developments in the global political sphere will also have an impact on the future of global branding. Growing geopolitical tensions are creating challenges for global brands. For example, Huawei, the Chinese telecom and consumer electronics brand, has been blacklisted as a source for 5G components by the UK and other European governments over national security concerns. This not only complicates the global expansion of Huawei in 5G, but also could also negatively impact brand equity by raising concerns among consumers outside of China about the brand's ties to the Chinese government. Beyond tensions between and among governments, the rise in populism and nationalism among consumers will also create complications for global brands. This was evidenced by boycotts against global fashion brands such Nike and H&M by Chinese consumers in 2021 in response to public comments by those brands that were critical of China's labor practices. A 2017 Ipsos study of U.S. consumers noted an increase in the frequency of Google search activity for the word "boycott", and that 25% of Americans "have stopped using products or services from a company because of its political leanings or because of protests or boycotts."[21] In such an environment, global brands must become increasingly more deliberate in determining the stances that they do or do not take on issues, and be prepared to accept the consequences of their choices, which may mean satisfying the needs of some consumers, while alienating others.

This is by no means an exhaustive list of developments that will influence the future of global branding. However, it does suggest that both the opportunities and challenges for building and managing global brands will be significant going forward. This places a high premium on being appropriately informed and strategic in managing a global brand and having the appropriate organizational structure to support global brand building and management efforts.

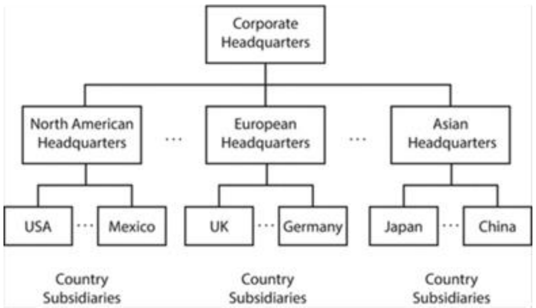
Exhibit 1 Global Branding Strategies



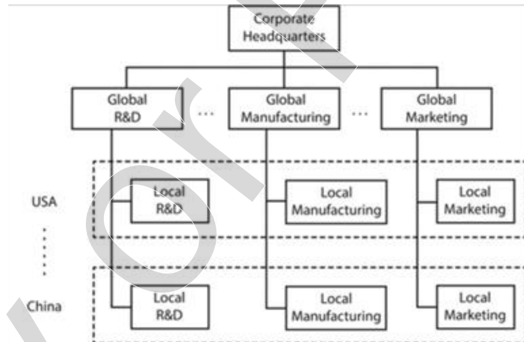
Source: Casewriters.

Exhibit 2 Organizational Structure Models for Global Branding

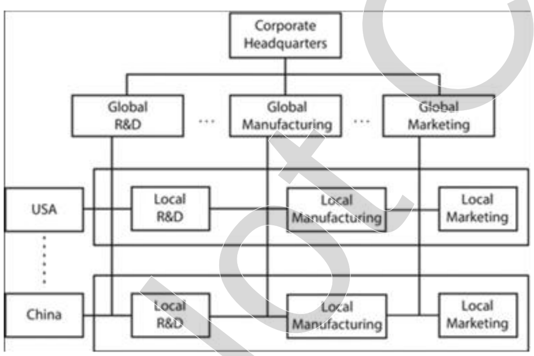
Geographic Model



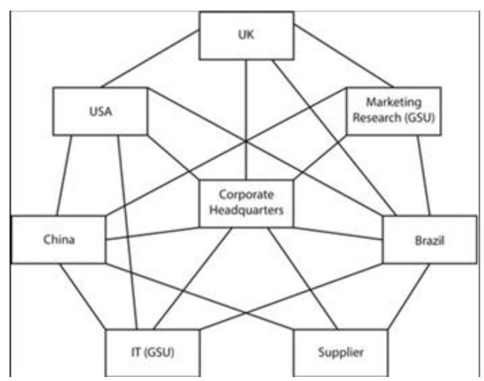
Functional Model



Matrix Model



Network Model



Source: Steenkamp, Jan-Benedict (2017) *Global Brand Strategy: World-wise marketing in the age of branding*, New York: Springer.

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