



## **Brand Audit Report (BAR)**

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December 13, 2020

## Table of Contents

<b>Executive Summary.....</b>	<b>4</b>
<b>1. Introduction .....</b>	<b>5</b>
1.1. The Company.....	5
1.1.1 Company Summary .....	5
1.1.2 Corporate Structure .....	6
1.1.3 Corporate Social Responsibility .....	6
1.1.4 Products .....	6
1.2. The Industry .....	7
1.3. The Consumer.....	8
<b>2. Branding Basics .....</b>	<b>8</b>
2.1. Brand Name .....	8
2.2. Brand Elements.....	9
2.2.1 Symbols .....	9
2.2.2 Slogans .....	9
2.3. Secondary Brand Associations .....	11
2.3.1 Country of Origin .....	11
2.3.2 Channels of Distribution.....	12
2.3.3 Co-Branding .....	13
2.3.4 Celebrity Endorsement .....	13
2.3.5 Event Sponsorships .....	13
2.4. Brand Value .....	14
<b>3. Brand Analysis.....</b>	<b>14</b>
3.1. Brand Identity .....	15
3.2. Brand Awareness .....	16
3.2.1 Social Media .....	16
3.2.2 Google Trends .....	16
3.2.3 Brand Recall .....	17

3.2.4 Brand Familiarity.....	18
3.3 Brand Image.....	19
3.4. Brand Positioning .....	22
3.4.1 Points of Parity and Points of Difference .....	23
<b>4. Brand Strategy.....</b>	<b>23</b>
4.1. Background.....	23
4.1.1 Brand Architecture and Hierarchy.....	24
4.1.2 Brand Portfolio .....	24
4.2. Marketing Programs .....	25
4.2.1 Product.....	25
4.2.2 Price .....	26
4.2.3 Placement .....	27
4.2.4 Promotion .....	27
<b>References .....</b>	<b>28</b>
<b>Appendix .....</b>	<b>32</b>

## **Executive Summary**

This brand audit report was developed for Havaianas, a Brazilian flip-flop brand that has over the years expanded internationally to more than 120 countries with increasing recognition and accomplishments. Havaianas has positioned itself in the footwear industry with the use of multiple brand elements and secondary brand associations. The report explores the brand's internal characteristics and external perceptions through secondary data as well as primary data obtained from a Qualtrics research created by the report's author. The survey gathered responses from 61 individuals in order to explore Havaianas' brand relationship concepts. The questions designed in the survey derived from Marc Fetscherin's book *The Brand Relationship Playbook* (Fetscherin, 2019). The comparison of primary and secondary data provides a deeper understanding of Havaianas' brand identity in contrast to brand image so that it can be understood if Havaianas is able to effectively convey its personality to consumers and stakeholders. The report concludes that Havaianas has been successfully utilizing brand marketing strategies over the years to reposition itself in its domestic market as well as to expand internationally and should continue to do so while keeping up with current industry trends and technological improvements.

# 1. Introduction

## 1.1. The Company

### 1.1.1 Company Summary

Havaianas is a Brazilian brand that was founded in 1962 under the Alpargatas footwear brand that had been established in 1907 in São Paulo, Brazil. Inspired by traditional Japanese sandals called *Zori* made out of rice straws, Havaianas came up with their signature rubber soles imitating rice grains which were patented in 1966 and are an important characteristic of their brand until this day. Initially, Havaianas' merchandise selling strategy were travelling salesman that would drive in the country through remote cities promoting and selling the singular blue and white flip flop model directly from a Volkswagen Kombi, a popular van in Brazil at the time. At the end of the decade, because of a manufacturing mistake, a new green version of the product was fabricated and sold, which accidentally turned out to be extremely popular amongst consumers. With increasing popularity of the Havaianas flip flops, in the 1980s, the sandals attained classification by the Brazilian Ministry of Finance in the country's Consumer Price Inflation (CPI) Basket of Goods, as it had become such a prevailing product in the ordinary Brazilian's lifestyle. Ever since, Havaianas has adopted innovative strategical approaches to expand the brand and its offerings, thus being able to retain existing consumers as well as expand internationally to more than 120 countries worldwide (Havaianas PT, 2020). With international offices in all continents, the brand employs over 18,000 workers and had a revenue of US\$535M in 2019 at a global growth of 3% from the previous year (Alpargatas, 2019a). While being an established and multinational brand, Havaianas still has great opportunity for growth, as exemplified in the SWOT Analysis on Figure 1 below.

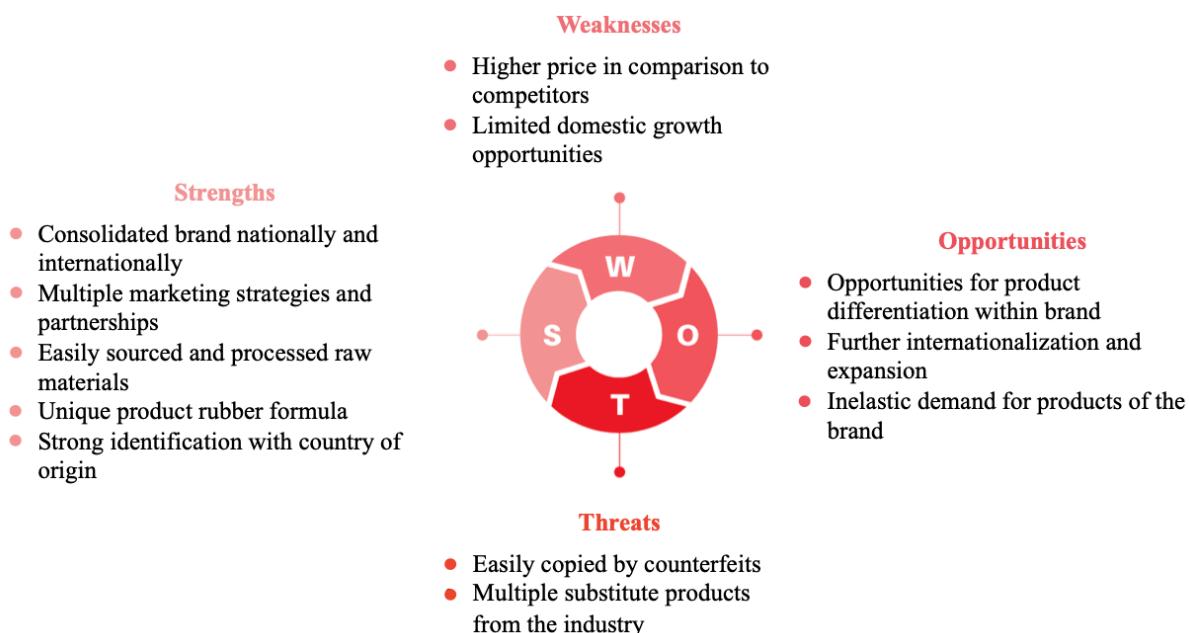


Figure 1: Havaianas SWOT Analysis

### **1.1.2 Corporate Structure**

The previously mentioned company Alpargatas is Havaianas' parent brand, which oversees other 3 footwear brands: Osklen, Mizuno and Dupé. The CEO of Alpargatas is Roberto Funari, however, the company's governance is exercised by its Board of Directors, composed of other seven individuals, as well as the Executive Board, which is also responsible for Alpargatas' business performance. The company is publicly traded in the Brazilian BM&FBovespa S.A. stock market, with 54.24% of its shares held by the investment groups Itaúsa, Cambuhy Investimentos and Brasil Warrant, which places them as controlling shareholders of the group since 2017 (Alpargatas, 2020).

### **1.1.3 Corporate Social Responsibility**

The two most important sustainability partnerships that Havaianas is involved in focus on environmental responsibility, those being the collaboration between Havaianas and IPÊ, as well as the one between Havaianas and Conservação Internacional. IPÊ, a Portuguese abbreviation for Ecological Research Institute, has been working with Havaianas since 2004 in a program for which the brand designs special edition flip flops impressed with Brazilian fauna and flora depictions which are sold in over 100 countries and revert 7% of liquid sales to the institute (IPÊ, 2018). A similar association takes place with the Conservação International NGO, which focuses on Brazilian marine life preservation and receive 7% of liquid sales of annual special editions launched by Havaianas for the cause. Moreover, Havaianas has also been working on developing increasingly sustainable product lines, such as the Havaianas Soul Collection, of which more than 60% is produced through recycled and sustainable material, processed through a supply chain that utilizes 88% less water than comparable conventional processes (Havaianas, 2020a).

### **1.1.4 Products**

Right after the manufacturing mistake that led to an accidental new color line for their flip flops proving a success, Havaianas began developing additional varieties of their famous footwear by elaborating new line extensions and product diversification options through brand extensions, such as accessories that range from sunglasses, beach towels, beach bags, floats, caps and socks to bikinis and apparel (Havaianas, 2020b). Beginning with the *Havaianas Baby* launch in 1995, the brand developed flip flops directed to an audience of children which had previously been untargeted. On that same year, other variations of the adult sandals were developed as well, and in 1998, Havaianas saw an opportunity to launch their *Havaianas Copa* line simultaneously with the 1998 World Cup, an extremely notorious event in Brazil. Through this opportunity, the brand launched flip flops containing the Brazilian flag in its straps – a very successful initiative that remains one of their best seller editions until currently (Mundo das Marcas, 2017). Through the following years, Havaianas took advantage of their market positioning to develop multiple lines which would attract diverse costumers to the brand's propositions, such as upscale, handmade,

and colorful sandals, thus ensuring their success worldwide which is safeguarded by their patented design. Figure 2 below displays some examples of Havaianas' products.



*Figure 2: Examples of Havaianas products*

## 1.2. The Industry

The flip flop industry worldwide has been valued at around US\$18.59 billion dollars (Statista, 2019a), with an expected CAGR of 4.2% in between 2019 and 2025 (Grand View Research, 2020), thus categorizing it as an industry in between growth and maturity in its lifecycle. Brazil is a big player in the flip flop market, responsible for exporting US\$ 170.5 million worth of flip-flops in 2019 (Statista, 2019b), while within the country itself, flip flops accounted for 44.8% of the national number of pairs of shoes produced in that same year (Statista, 2020a). The market growth is driven by the practicality, trendiness and associations in connection with flip flops, but brands should be aware of increasing concerns towards ecological sustainability of material sourcing and production (Grand View Research, 2020).

While Havaianas' competitors can be considered not only flip flop manufacturers but companies that operate in other types of footwear sales as well, the most important competitive analysis takes part within the specific flip-flop niche to better understand the brands' positioning and equity in their own industry. Domestically and internationally, Havaianas' biggest competitors can be considered: Grendene, which operates multiple flip flop and sandals brands, such as Rider, Melissa and Ipanema, the latter being a considerable competitor in Brazil, the country of origin (COO) for both brands; Crocs, which offers casual footwear and are a major global player in the industry; REEF, an Argentinian flip flop brand which is present worldwide as well; and the brands under the parent company Boardriders, such as Quicksilver, Roxy, and Billabong, all

brands which do not limit their products to flip flops but have high market presence in that specific sector as well. Other well-known footwear brands, such as Adidas and Nike, are also considerable competitors to Havaianas, as they have recently launched sandals under their brands which have been highly successful among customers.

### **1.3. The Consumer**

As Havaianas' main products are its flip flops, sales are subject to seasonal fluctuations on different hemispheres geographical locations – an issue which Havaianas tries to conquer through global positioning in order to balance out the seasonality. Thus, while the brand focuses on warmer tropical locations, such as Brasil and Australia, which are two of Havaianas biggest markets, it has expanded its consumer base to other seasonally warm climates who might also be interested in the product, such as the United States and France, countries which present a vast consumer base for the flip flops as well. The market is further demographically segmented into men, women, and children, all segments which Havaianas targets by creating different lines and limited-edition merchandise in order to position themselves as a stronger player in the industry, such as their line *Havaianas Wave* catered to men, *Havaianas Joy* for women, and *Havaianas Baby* designed for young babies and children (Mundo das Marcas, 2017). Thus, not only does Havaianas target different genders through their varied products, the brand seeks to attend to different ages as well, expanding their target markets and consumer profiles. The price of their flip flops can vary as well, depending on distinctive products that can be special editions, partnerships, or sourced with different materials. Flip flops in their current US website range from US\$14 to US\$150 (Havaianas USA, 2020). Most of Havaianas' merchandise focuses on product differentiation offered to a varied and broad consumer base, positioning themselves on a differentiation strategy per Porter's Generic Competitive Strategies matrix (Porter, 1985). To create these differentiating points of difference from competitors, Havaianas focuses on their country of origin, utilizing Brazil's tropical image to strengthen the brand, as well as psychographic variables, such as trying to convey a 'beach' and laid-back lifestyle through their brand, with a sense of strong, cool and modern personalities to whoever consumes their products.

## **2. Branding Basics**

In order to further understand a brand's history and its current positioning in the market, it is essential to examine its branding elements. The brand value chart in Table 1 provides a general overview of Havaianas' elements in regard to its memorability, meaningfulness, likability, transferability, adaptability, and protectability.

### **2.1. Brand Name**

Even though the design of Havaianas flip flops were inspired by Japanese Zori sandals, the brand's name comes from the Portuguese word for "Hawaiians" (Havaianas USA, 2020b). The choice of the name most likely derives from Hawaii being considered an internationally well-

known lush tropical destination for its sunny island beaches (Sixsoft, 2014). This creates brand associations with warm littoral summers which suggests not only the type of footwear sold by the brand, but also creates a connection with a well-known place not only to Brazilians, but to worldwide customers too. The name, created with the brand in 1962, has never been changed since and has always been consistent through all the countries in which Havaianas' products are sold in.

## 2.2. Brand Elements

### 2.2.1 Symbols

The Havaianas logo, just like its name, is consistently utilized in all the countries in which the brand is present in and has been the same ever since its creation, with three different versions of the logo being currently accepted for use as displayed in Figure 3. The original color of the logo is a bright red tone, however, in different occasions it has also been designed with different colors to match aesthetics, for example in advertisements or even on the sandals themselves. Nevertheless, one element of the logo always remains the same, which is the logo font.



### 2.2.2 Slogans

Slogans have been a significant brand element for Havaianas' success. Through the years, the brand has implemented different new slogans in its campaigns. Through the 1960s, right after the brand's creation, its slogan was "*Havaianas, o andar mais confortável do mundo*" (Mundo das Marcas, 2017), translated to "*Havaianas, the most comfortable walk in the world*" in English, popularizing the flip flops as a casual footwear item for every Brazilian to have. Afterwards, through the beginning of the 70s, the brand utilized other slogans such as "*Não deforma, não tem cheiro, não solta as tiras*" (Mundo das Marcas, 2017), meaning "*Doesn't deform, doesn't smell, doesn't loosen the strips*", referring to the superior quality of Havaianas flip flops when compared to other generic brands. Other slogans utilized were also "*Diga-me com quem andas*" (Mundo das Marcas, 2017), a reference to a popular Brazilian proverb that directly translates to "*Tell me who you walk with, that I will tell you who you are*" – a version of the English expression "*Birds of a feather flock together*". These references to popular Brazilian culture were essential for the growth of Havaianas in its domestic country, as it appealed to the general population and attracted a large customer base.

In 1973, after growing success of its flip flops, the brand worked with marketing agency JWT to come up with its most popular slogan (Havaianas Flip Flops, 2017), translated from Portuguese "*Proteja-se das fajutas. Legítimas, só Havaianas*" (Havaianas Flip Flops, 2017) to English

Figure 3: Havaianas Logos (Source: Logo Download, 2020)

“Protect yourself from phony Havaianas with the real ones”, an idea that arose from the increasing number of counterfeit Havaianas that were being created at the time (Havaianas USA, 2020b). These counterfeits were referred to as ‘fajutas’ in the slogan, a term that became so popular with the new Havaianas slogan that it eventually got included in the *Aurélio Brazilian Portuguese Dictionary* as a synonym for low-quality product counterfeits (Havaianas, 2020c). The famous slogan was an important brand element for many years. However, in the 90s, Havaianas needed to reposition its image in the market, as its products appealed to lower social classes but not as much to a wealthier consumer base. For that reason, a new slogan “*Havaianas, todo mundo usa*” (Havaianas Flip Flops, 2017) was created, translating to “*Havaianas, everyone wears it*”. The success of the slogan persisted after Havaianas market repositioning and more currently, in 2016, the brand implemented a new slogan “*Original do Brasil desde 1962*” (Havaianas Flip Flops, 2017), translating to “*Original from Brazil since 1962*”, hoping to convey its brand heritage as well as its country of origin in order to expand the international presence and influence of Havaianas.

*Table 1: Havaianas Brand Value Chart*

Elements	Name	Logo	Slogan
Memorability	The name of the brand is very memorable. It has been consistent ever since Havaianas’ founding and is part of the brand logo, besides being in every product of the brand as well.	The logo is memorable too. Its bright red color attracts attention and the company’s name in the logo makes it very recognizable. It has a simple design as well which aids in recall.	The slogans throughout Havaianas’ history are extremely memorable considering they usually involve popular culture or utilize plays with words. They are also effectively short, making them easier to remember and recognize.
Meaningfulness	The Havaianas brand name is not especially meaningful. While it suggests a place of association with the sandals, this place is not the brand’s COO. Moreover, it does not indicate what the company sells.	The logo is meaningful. It focuses on the brand name and does not offer any distraction elements. It has also not been altered ever since the brand’s founding.	The slogans utilized by Havaianas are very meaningful. They aim to enhance the brand’s PODs and provide strong identification with the COO, Brazil, utilizing popular culture and imagery associated with the country.
Likability	The name is very likeable. It pertains to Hawaii which is a well-known tropical location that many enjoy and aspire to visit, setting the brand’s tone regarding its personality.	The Havaianas logo is likeable. It has a casual and easy to read font portrayed in bright colors which portrays the brand’s approachable and amicable impression.	The slogans are extremely likeable. They often contain humorous notes which aids in consumer recall of the slogans and encourages viral effects, increasing the popularity of Havaianas.

	The brand name of Havaianas is transferable as it does not specify a certain product category. While it focuses on a tropical location, internationally the name is not literally translated, which creates easy possibilities for expansion.	The Havaianas logo is very transferable as it is solely the brand name circled with an oval shape. Thus, it conveys no specific meaning or classification.	The slogans are somewhat transferable. They do sometimes specify the brand's main product, flip flops. However, in response to the company's increased international presence, the more current slogans have been designed to have a higher overseas transferability, not mentioning exclusively Brazilian culture as much, but still positioning themselves in regard to the COO.
Adaptability	The brand name is highly adaptable, as it can be utilized in any time period as well as product, since it does not specify any industry.	The Havaianas logo is adaptable. It is simplistic and has not changed since the brand's founding, however, that allows for additional features in the logo if needed be in the future.	The Havaianas slogans are adaptable as well. The brand has had many different slogans over time and are creative in coming up with catchy and popular themes for their slogans.
Protectability	The brand name is protectable as it is trademarked and well-known in its industry.	The Havaianas logo is highly protectable since it is registered as a trademark symbol.	Havaianas slogans are not protected since they are not trademarked. However, they are sometimes specific to the brand's main product, which is flip flops, making it harder for other brands to utilize them at Havaianas' expense.

## 2.3. Secondary Brand Associations

### 2.3.1 Country of Origin

As exhibited by the brand's most recent slogan, “*Original from Brazil since 1962*”, Havaianas has increasingly tried to incorporate its country of origin into the brand's image, utilizing COO as one of the points in their positioning strategies. The previous president of US operations for Havaianas, Afonso Sugiyama, suggested that Havaianas seeks to remain loyal to its original brand identity, a large part associated with “Brazilian spirit and its values” (Khalpada et al., 2012). Brazil can be seen as a dichotomous country of origin as it has both positive and negative associations, but the brand tries to highlight the positives in its approach. The positive associations that Havaianas seeks to attain tend to gear towards cultural experiences, such as the country's famous festivals, like carnival; traditional music, such as samba and bossa nova; popular sports, namely soccer; as well as celebrated vacation and sunny destinations, such as Rio de Janeiro (Mariutti & Tench, 2015). The latter is the most important association for Havaianas,

as it directly relates to the products the brand sells, which are mostly geared to warmer weather. Examples of marketing material from Havaianas which directly relies on COO are displayed in figure 4 below.



Figure 4: Examples of Havaianas marketing material highlighting elements of Brazilian culture, nature, and landscapes

### 2.3.2 Channels of Distribution

At the beginning of Havaianas, the flip flops were sold through traveling salesman who owned Volkswagen vans and headed the merchandise to the countryside, distributing the products in simple plastic bags directly to consumers (Havaianas USA, 2020b). Nowadays, the successful brand is present in more than 150 thousand points of sale throughout Brazil, and more than 10 thousand internationally (Alpar, 2020), with its biggest international markets being the USA, France, and Australia (Mundo das Marcas, 2017). Havaianas chooses to utilize a mixed approach when it comes to channels of distribution. Its products are sold through wholesale retail stores, franchised stores, higher-end department stores such as Saks Fifth Avenue and Galleries Lafayette, but also through its own independent flagship stores, which Havaianas hopes to expand in order to switch from indirect sales to a more direct approach to the customer (Mundo das Marcas, 2017). The flagship stores also allow for higher customization of its products, as they present not only a higher variety of merchandise, but also qualified professionals which can embed different decorations and gadgets chosen by the consumer to each flip flop, ensuring that buying an Havaianas remains not only a simple purchase, but derives an entire customer experience from shopping.

### **2.3.3 Co-Branding**

Havaianas takes high advantage of co-branding opportunities that may favor the brand and advance it to different types of customer segments. The brand has a wide range of brands it works with, discerning not only in industries but also in target markets and positioning opportunities. For example, Havaianas tries to capture higher-end customers by partnering with brands such as H.Stern Jewellers, Swarovski, Céline, Paul&Joe and Missoni (Mundo das Marcas, 2017) in order to create limited edition sandals embedded with crystals, the partner brand's name or designer signatures, thus attracting consumers whose purchasing preference is geared towards exclusive and sophisticated brands. However, Havaianas also tries to capture a trendier generation which might not be as attentive to brand exclusivity as they are to aesthetics and fashion styles. Flip flops in partnership with brands such as Brazilian fashion designer Farm, European companies like Pull&Bear and Stradivarius (Mercado & Consumo, 2019) or American brands like GAP (RG, 2009) have been recurrent over the years. Moreover, Havaianas has also sustained a successful partnership with Disney, producing merchandise stamped with characters from movies and animations, providing a major international development for Havaianas in foreign markets (Mundo das Marcas, 2017).

### **2.3.4 Celebrity Endorsement**

Celebrity endorsements have been pivotal for Havaianas story ever since its creation. Shortly after the brand's founding, the popular Brazilian humorist Chico Anysio was portrayed as the brand's advocate in Havaianas' first major marketing move, a TV commercial in the 1970s. The humorist returned working in advertising the brand in the 1990s, at a time which Havaianas was popular enough to get the attention of many other Brazilian celebrities who gladly worked with the brand as well. In Brazil, celebrities like Fábio Assunção, Luana Piovani, Vera Fisher, Malu Mader, Bebeto, Rodrigo Santoro, Reinaldo Gianechini and Cauã Reymond were involved in endorsing Havaianas flip-flops, intensely increasing the brand's popularity. Many other actors and actresses, athletes, models, and TV presenters have worked alongside Havaianas, reinforcing the brand's slogan that "*everyone wears it*". More recently, Rubinho Barrichello, ex-pilot in Formula One and Giovanna Ewbank, Brazilian actress and model, have been the faces for Havaianas (Alpargatas, 2019b).

### **2.3.5 Event Sponsorships**

Havaianas is sure to take up opportunities to be present at popular events. Its first feature was an appearance in the 2003 Oscar Movie Awards. Havaianas designed special edition sandals embedded with Swarovski crystals for celebrities, each packaged in exclusive boxes with the actors' and actresses' names with a design resembling Hollywood's Walk of Fame stars. Havaianas contacted each attendee's agent to acquire their footwear numerations previously, to ensure every celebrity would have the chance to keep their flip flops after the awards (Mundo das Marcas, 2017), showing that their intent to utilize event sponsorships as a secondary brand

association was well developed. Other types of events are also interesting for the brand – in 2019, for example, Havaianas established a two-year partnership with WSL, the World Surf League, sponsoring their competition phases in Brazil, Australia, the USA, and Portugal (UOL, 2019). In its home country, Havaianas also recurringly participates in big events, supplying flip flops at VIP boxes in Brazil's biggest carnival parties and in the São Paulo Fashion Week (BH1, 2018). While these events are varied and diverse, they attract different consumer types which are all interested in one common thing Havaianas can provide, which is comfort in footwear. This common designator is key since it ties together all of the brand's disparate initiatives.

## 2.4. Brand Value

While brand value can be a complicated measurement, with the possibility of many varied approaches such as cost-based approaches, market-based approaches, and revenue-based approaches (Fetscherin, 2019), there are reliable rankings published annually with brand information worldwide, such as Interbrand. Interbrand's methodology is certified with ISO 10668, which “specifies requirements for procedures and methods of monetary brand value measurement” (ISO, 2017). Their approach is based on financial performances on branded merchandise, brand influence in purchasing behavior, and brand competitive strength (Interbrand, 2020). In 2019, Interbrand valued Havaianas at R\$735 million, an equivalent to US\$127,7 million<sup>1</sup> (Statista, 2020b). Moreover, in 2019 Havaianas has also been featured in the Reputation Institute's rankings Global RepTrak 100, in the 43<sup>rd</sup> position, and Global CR RepTrak 100, in the 7<sup>th</sup> position (Ranking the Brands, 2020). The Global RepTrak 100 is a survey-based brand ranking which evaluates stakeholder's brand perception effect on purchasing behavior looking to determine the “most reputable companies worldwide” (RepTrak, 2020). The Global CR RepTrak 100 ranking analyzes companies' corporate social responsibility (CSR) reputations based on the survey conducted by the Reputation Institute. In the past, Havaianas has also been a part of Interbrand's Best Brazilian Brands ranking (Ranking the Brands, 2020).

## 3. Brand Analysis

In order to analyze Havaianas as a brand, an exploratory online survey was conducted with a total of 89 respondents, 28 of which could not be utilized due to unsuccessful completion of the questions. Thus, 61 of the responses were included in inspecting multiple brand dimensions of Havaianas. Of the surveyed population, 78.69% were in between 18 and 24 years old, 8.2% in the range of 25 to 34 years old, 9.84% between 35 and 44 years old, 1.64% between 45 and 54 years old, and 1.64% 55 or older. Moreover, 39.34% of the respondents were male, 59.02% were female, and 1.64% identified with another gender. Geographically, 49.18% of individuals who took the survey were located in the United States of America, 39.34% in Brazil, 1.64% in Barbados, as well as 1.64% in France, 1.64% in Mexico and 1.64% Spain. On the survey, 4.92%

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<sup>1</sup> Calculated with the exchange rate RS\$/US\$ as of the 3<sup>rd</sup> of November, 2020.

respondents preferred not to disclose their country of residence. The survey questions are displayed in the Appendix. In the brand analysis, data obtained from secondary sources are compared and contrasted with the data obtained through the survey as a primary source.

### 3.1. Brand Identity

A brand's identity refers to the values a brand tries to communicate to its customers, through its personality, elements, and positioning, as to create an optimal brand image. Thus, brand identity and brand image should be as closely related as possible, considering a brand ideally wishes the public to perceive the image they try to convey. A big difference in between both could indicate failed communication or a weak brand strategy (Keller, 2008). To compare Havaianas' brand identity and brand image, a word cloud was created with Word Art (Word Art, 2020) by analyzing word frequency in the brand's website. As Havaianas is an international brand with multiple websites for different major markets, the USA Havaianas (Havaianas USA, 2020a) website was the one analyzed for practical purposes. Figure 5 indicates the higher frequency words portrayed in a bigger font, and the lower frequency words displayed smaller.

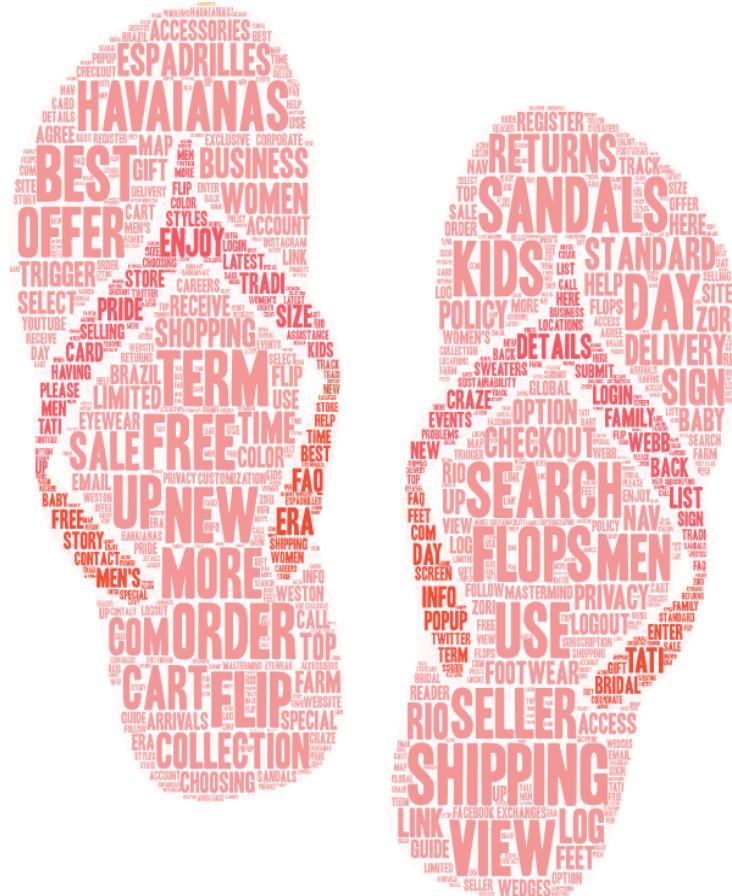


Figure 5: Havaianas USA website homepage word cloud

When analyzing the word cloud, it is noticeable that the most common words are generic sales jargon, such as the products' names, "offer", "new", "order", "sale", "shipping", among many other terms. When disregarding the higher frequency of these trivial words, the highlights of the word cloud are "enjoy", "Brazil", "family", "Rio", "color", "pride", "customization" and "sustainability". Those words suggest a big part of the brand identity Havaianas is trying to convey to their customers.

### **3.2. Brand Awareness**

#### **3.2.1 Social Media**

Social media has become an important marketing tool over the years as it is a cost-effective mechanism in advancing a brand nationally and internationally while reaching a very wide audience easily. In 2016, Havaianas was considered the best-known Brazilian consumer brand in various countries, such as in the UK and in Italy, as well as in its biggest international markets (Alpargatas, 2016). The brand continues to work on both its traditional and digital presence through increased brand awareness initiatives. They have also been working on increasing the brand's presence in Asian Pacific markets, where previously Havaianas had not focused as much as they had in Brazil, the US, Europe and EMEA (Middle East & Africa) (Ng, 2019).

Taking advantage of current trends and consumer interaction, Havaianas has been developing a bigger focus in digital marketing to be able to grow and foster its online presence worldwide as well. The brand's Facebook page gathers 8.3 million likes (Facebook, 2020) and its main Instagram page has a total of 2.7 million followers (Instagram, 2020). There are other regions with Instagram pages for Havaianas in specific geographical locations, such as Havaianas Europe, Havaianas Australia, and Havaianas Indonesia as well, with content curated specifically for those audiences. The brand's main Twitter page has 17 thousand followers (Twitter, 2020), and, while the brand does not have a specific LinkedIn page, its parent company Alpargatas S.A. has 346 thousand followers in the platform (LinkedIn, 2020). Furthermore, Havaianas' Pinterest page is followed by around 6 thousand users, with 324 thousand monthly visualizations (Pinterest, 2020). The brand utilizes its various social media to interact with its consumer base through initiatives such as trending hashtags, as exemplified by its current campaign #PorDiasMaisHavaianas, which translates to "#ForMoreHavaianasDays" (Instagram, 2020).

#### **3.2.2 Google Trends**

Not only is it important to understand Havaianas' brand awareness through current social media numbers and strategic digital marketing plans, it is also relevant to comprehend how the brand's awareness had changed over time. To obtain some time-series data for analysis, the Google Trends of the search term for 'Havaianas' was utilized. The interest for the search term 'Havaianas' is displayed in figure 6 below over a period of 10 years, from November 2010 to November 2020 (Google Trends, 2020a).



Figure 7: Worldwide Havaianas Google Trends (November 2010 - November 2020)

There is a very clear fluctuation in the Google Trend for Havaianas, which is essentially due to the seasonality in the sales of the brand's main products, which are flip flops. The worldwide trend presents a spike in both July and December, which are respectively summer peak months in the Northern hemisphere and in the Southern hemisphere. The seasonality is even better observed when comparing countries in the North and South of the globe, such as France and Australia, which have a similar market size for Havaianas but opposing seasons. Figure 7 displays the comparison between the Google Trends in these two countries (Google Trends, 2020b), which explicitly shows the seasonal fluctuations in searches during the respective summertimes, July in France's summer and December is Australia's summer, which then end up intercalating.

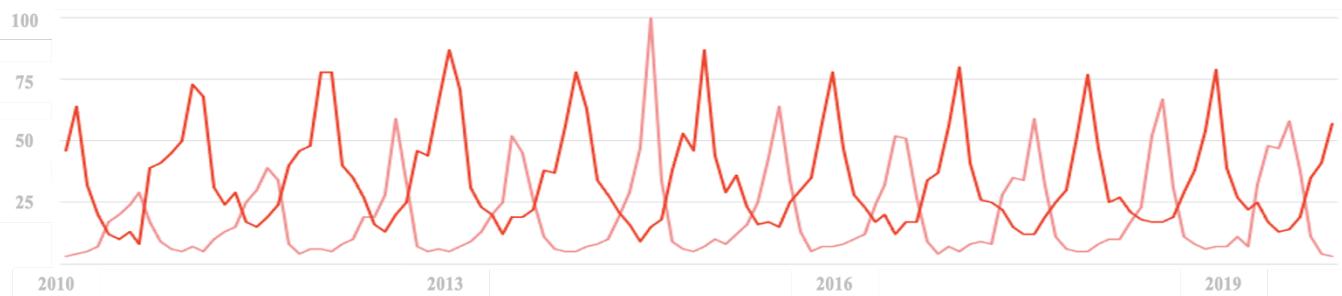
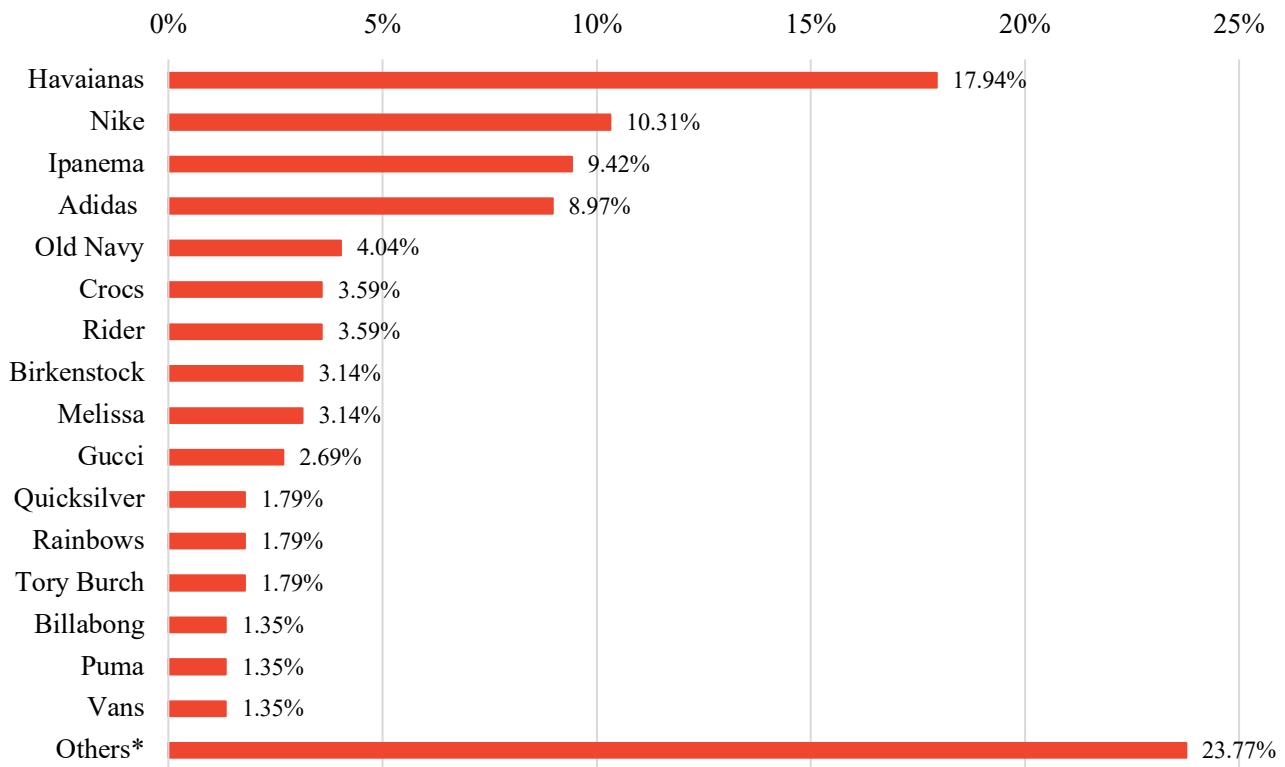


Figure 6: Comparison of Havaianas Google Trends of France (light pink) and Australia (dark red) (November 2010 - November 2020)

### 3.2.3 Brand Recall

Within brand awareness, both brand recognition and brand recall can be measured. Brand recognition is analyzed when respondents are given a brand element and try to identify which brand it pertains to. In Havaianas' case, that was hard to measure considering the logo has its brand name, thus, a brand recall evaluation was conducted instead. Brand recall relates to an individual's probability to remember a brand's name from top of mind when given a certain niche, such as the industry or segment a brand is in, without any type of aid besides their own memory. This is an important concept as it portrays the imprint a brand has on its targeted consumer base. To analyze Havaianas' presence in its industry through brand recall, the survey respondents were asked to name up to five brands that sell flip flops or casual sandals which

came to their mind without the help of any branding elements. Figure 8 below displays the brands that were recalled by the individuals surveyed.



\* The “others” category is comprised of brands that were recalled in 2 or less instances, making up less than 1% of total brands recalled.

These include: Carmen Steffens, Champion, GAP, Jordan, Michael Kors, Reef, Sam Edelman, Under Armour, Yeezy, Abercrombie, Aeropostale, Aldo, American Eagle, Beira Rio, Burberry, Capodarte, Cartago, Cendrillon, Chanel, Coca Cola, Deux Main, DSW, Fashion Nova, Galleries Lafayette, Green FlipFlops, Grendha, Hurley, Jack Rogers, Kappa, Lucy Brand, Luz da Lua, Macy's, Oakley, Oasis, Ozark, Ron Jon Surf Shop, Side Walk, Sketchers, St. Tropez, Steve Madden, Tommy Hilfiger, Universal Thread, Via Marte and Victoria's Secret

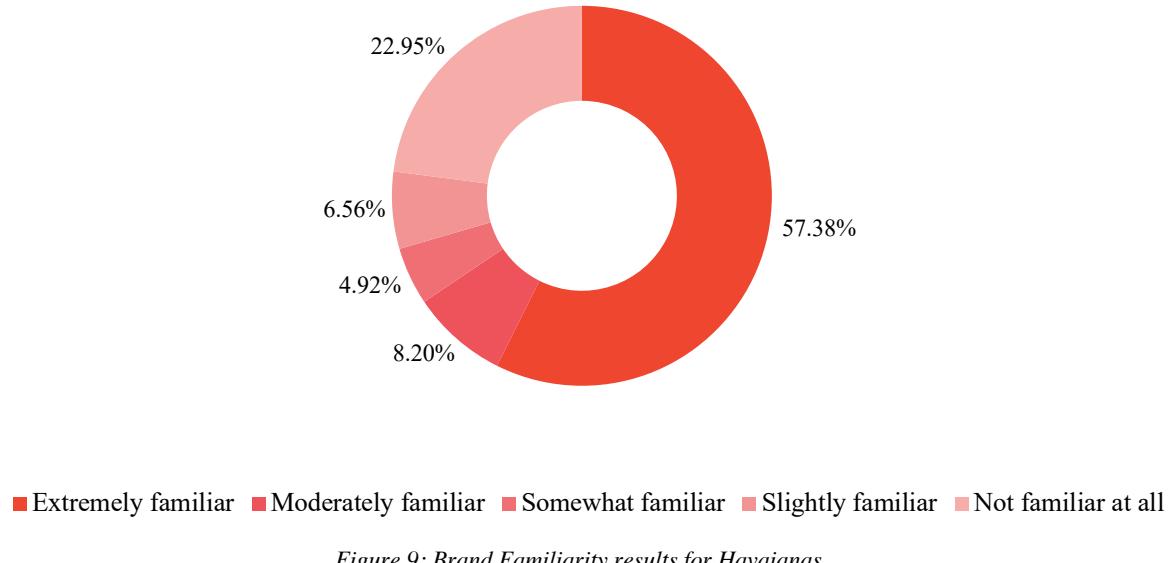
*Figure 8: Distribution of brands per respondents' Brand Recall responses*

From all the brands that were recalled by respondents, Havaianas was most prominent of all, with 17.94% presence in recall answers, followed by Nike, Ipanema, and Adidas. Interestingly, 60% of Havaianas recall respondents were from Brazil, 27.5% from the USA, and 12.5% from other countries. However, within the main competitors, Adidas and Nike were mostly recalled by USA residents, while Ipanema was mostly recalled by those resident in Brazil. This difference displays Havaianas competes for public awareness with different flip flop and casual sandals brands in different countries it is present in.

### **3.2.4 Brand Familiarity**

Recalling a brand indicates strong consumer memory of a brand, but it does not necessarily imply that an individual is aware of the brand depth itself, such as knowing its products or services (Fetscherin, 2019). To measure individuals' familiarity with Havaianas, the respondents were asked to rank their familiarity with the brand as “extremely familiar”, “moderately

familiar”, “somewhat familiar”, “slightly familiar” and “not familiar at all”. The results are displayed in figure 9.



*Figure 9: Brand Familiarity results for Havaianas*

Figure 9 shows that the highest percentage of respondents were extremely familiar with Havaianas, at 57.38%, which were 35 out of 61 respondents, a highly favorable indicator for the brand. Nevertheless, the second highest percentage of familiarity were of respondents who were not familiar at all with Havaianas, at 22.95%. All respondents that were residents of Brazil claimed they were extremely familiar with the brand, whereas respondents in the USA were divided: 40% were not familiar with Havaianas at all, 12% were slightly familiar, 7% were somewhat familiar, 10% were moderately familiar, and 30% were extremely familiar. In the remaining countries, the answers were varied.

### 3.3 Brand Image

While awareness is an essential component to measure brand knowledge among consumers, it is even more important to analyze the brand's perceived image, as it can be either positive or negative. According to secondary data obtained from Social Mention (Social Mention, 2020a), Havaianas has a slightly positive brand image on social media, with a positive to negative sentiment ratio of 6:1, and 21% of passion, which measures “the likelihood that individuals talking about your brand will do so repeatedly”. It also has 12% reach, which measures “the number of unique authors referencing your brand divided by total number of mentions” according to the website (Social Mention, 2020b).

Besides Havaianas' reputation and prominence in social media, it is possible to analyze the brand's image through primary data from the survey's respondents, who were asked to list three words that came to their mind when they thought about Havaianas. To better understand if the company's internal brand identity is in line with the perceived brand image, which measures the

perception of consumers, similarities and differences can be observed in between the word cloud in figure 5 on section 3.1 discussing brand identity, and the cloud displayed in figure 10 below, with words gathered from the survey and its responses.

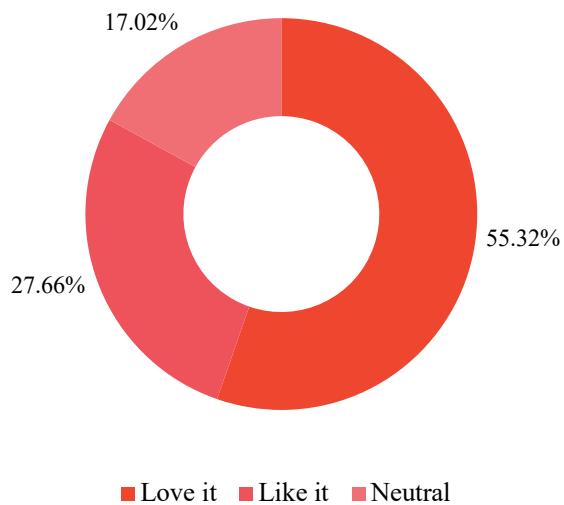


Figure 10: Word cloud from Havaianas' Brand Image results obtained from survey

The bigger words displayed in the figure portray the ones more often mentioned by individuals in their responses. Those words in this case were “beach”, “comfortable” and “comfort”, “Brazil” and “Brazilian”, “cheap”, “style”, “good”, “cool”, “famous” and “colorful”. It is clear that Havaianas has been able to successfully utilize their country of origin as a positioning and brand image mechanism, as well as utilizing its tropical geographical location to connect Havaianas with a beach style brand that is perceived as cool and stylish. None of the respondents mentioned “sustainability” as a word that came to mind, which demonstrates the brand could focus on enhancing that aspect of its image, as that term previously did compose the word cloud put together representing brand identity. While the word “cheap” was frequently mentioned and could possibly have a negative connotation, that possibility is undermined by the frequency of the words “good” and “quality” which convey a positive characteristic.

In alignment with the word cloud, overall respondents seem to enjoy the brand as a whole. When being asked how they felt towards Havaianas, individuals were able to choose between hating the brand, disliking it, feeling neutral towards it, liking it, or loving Havaianas. There was also an

option for not knowing how they felt. Within those options, 55.32% of respondents indicated they loved the brand, 27.66% indicated they liked the brand, and 17.02% felt neutral about it, as indicated below in figure 11. Respondents which answered they did not know were not included. No respondents answered they actively disliked or hated the brand.



*Figure 11: Brand Image results for Havaianas*

Of those who responded they loved Havaianas, 24% indicated they always buy products from the brand, 40% often do, and 32% responded they sometimes buy their merchandise. Only 4% of those respondents said they rarely buy products. Furthermore, within individuals who responded they like Havaianas, the majority expressed they sometimes buy their products at 70% of respondents, 10% said they often do, 10% said they rarely buy the brand's products, and 10% claimed they never buy Havaianas' merchandise. Nevertheless, those who felt neutral about the brand indicated mostly they never buy from Havaianas, with only one respondent claiming they rarely do.

The same pattern followed when individuals were asked on a scale of 1 to 10 (from not likely to very likely) the likelihood that they recommend the brand to another person. Those who had claimed they love Havaianas gave it recommendation scores that averaged 9.88, suggesting they are very likely to recommend the brand to someone else. Those who responded they like the brand gave it an average recommendation score of 8.7, and those who are neutral towards it totaled a score of 3.38, which indicated they are not likely to recommend the brand to another person. These results display the importance of a positive brand image. While brand awareness is a great indicator of how many people know the brand, only by analyzing concepts such as brand love or hate it is possible to understand the impacts of consumer feeling in brand activities. While Havaianas does not experience brand hate according to the survey, even those individuals who are neutral to it are not very likely to recommend the products to others. This demonstrates brands should strive for a positive brand image to ensure consumers either like or love the brand, as it incentivizes frequent purchases and higher consumer loyalty.

### 3.4. Brand Positioning

As discussed in the industry analysis section, Havaianas faces competition not only from brands that focus solely on flip-flop and sandal manufacturing like themselves, but also from other well-known brands that launch varied footwear as part of their product offerings promoted with the brand name and image. Through the survey, brand recall data has confirmed this claim, as many respondents did not only recall brands which centralize on flip-flops, but also brands which operate in the footwear market more generally and have flip-flops solely as part of their diverse portfolio. To better understand the positioning of Havaianas within its industry and among these competitors, the survey requested respondents' perceived price and perceived quality of Havaianas and competitors, from a scale of 1 to 5. Perceived price could be classified as "very cheap" (1), "cheap", "average", "expensive" or "very expensive" (5), and perceived quality as "poor" (1), "fair", "average", "good", or "excellent" (5). In both questions respondents could also answer they did not know enough to opine, as to not mistakenly skew answers. Havaianas scored an average of 3.17 in respondents' perceived price of the brand, and 4.33 in perceived quality. The brand's scores, along with its biggest competitors scores were plotted in the positioning map displayed in figure 12, with the industry average as the map's origin.

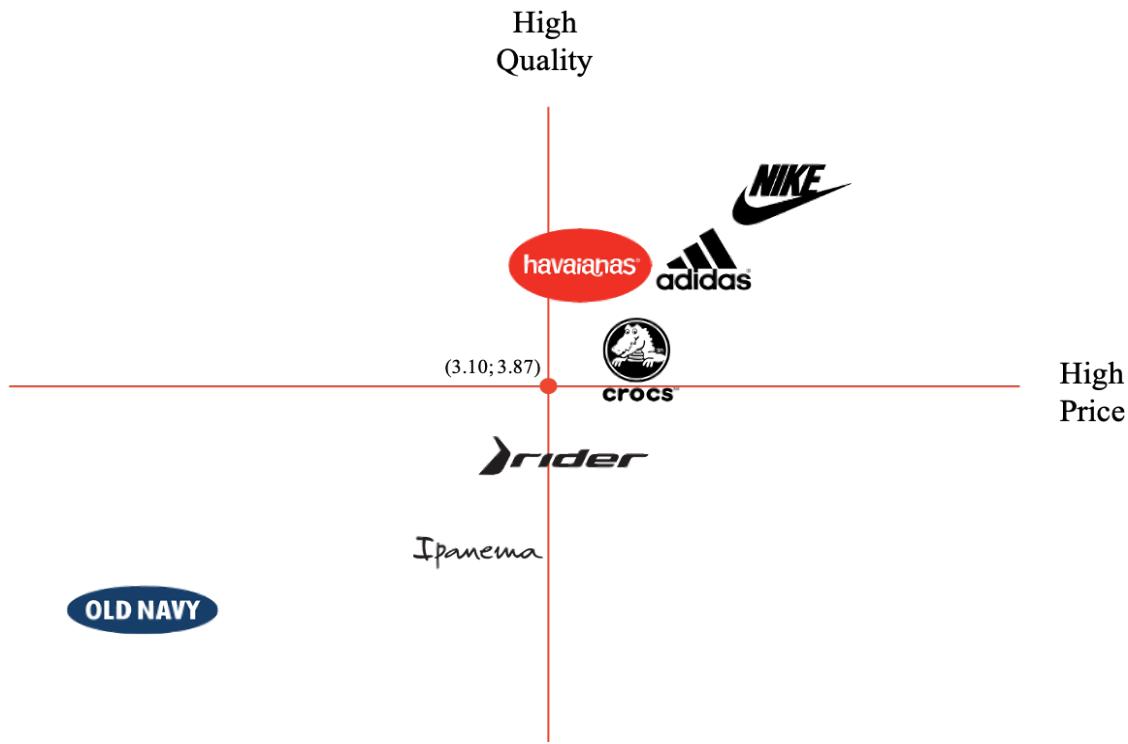


Figure 12: Brand Positioning Map of Havaianas and its competitors with industry average as origin

Havaianas performed higher than the industry average in both in quality and price assessments. The industry average for price was 3.10 while the industry average for quality was 3.87. Thus, while Havaianas is considered higher quality than the average brand in the industry, they could work on their price levels as to increase their competitive presence in the footwear market as it is

only slightly cheaper than other competitors. Nevertheless, even with higher-than-average prices, Havaianas is still perceived to be in the fair value line, if not even presenting superior value to customers. It presents a higher quality for a lower price than other brands that present the same quality levels, as seen in the positioning map when comparing Havaianas and Adidas for example.

### **3.4.1 Points of Parity and Points of Difference**

When optimizing brand positioning to occupy a certain place in the market and obtain a positive brand reputation, brands work towards developing their points of difference (PODs) and ensuring they meet and satisfy points of parity (POPs). POPs ensure the customer that a brand suffices basic product requirements and operate sufficiently well on elemental attributes. However, PODs differentiate brands from its competitors by attributing exclusive benefits to a brand that consumers strongly associate and positively appraise when distinguishing the brand among competitors, thus individualizing beneficial components (Keller, 2008). Table 2 below displays the POPs and PODs of Havaianas in the market as to more deeply understand its brand equity and positioning when compared to competitors.

*Table 2: Havaianas' Points of Parity and Points of Difference*

<b>Points of Parity (POPs)</b>	<b>Points of Difference (PODs)</b>
<ul style="list-style-type: none"> <li>• Comfortable footwear</li> <li>• Product and line extensions within brand</li> <li>• International brand presence</li> <li>• Perceived within fair value line range</li> </ul>	<ul style="list-style-type: none"> <li>• Higher durability from exclusive manufacturing material</li> <li>• Unique trademarked design distinguishable and recognized by consumers</li> <li>• Customizable product options</li> <li>• Strongly associated with Brazil, summertime, and the beach</li> <li>• Fun advertisements and brand image</li> </ul>

## **4. Brand Strategy**

### **4.1. Background**

Havaianas has gone through many revamping initiatives in its brand strategy to be able to establish their position in the footwear industry. Currently, the brand is focusing on maintaining its large Brazilian market share while increasing and intensifying its international presence both in countries the brand is already present in and in new markets, as well as its digital presence additionally (Alpargatas, 2019a). To increase international awareness, Havaianas plans to open more flagship stores rather than expanding its operations solely through other retail channels as that allows the brand to sell all of its line extensions and customization options in the stores.

For its digital positioning, Havaianas has been working with new celebrity partnerships through trendy hashtags and campaigns in which the public can participate in, hence increasing customer interaction with the brand in the process, and taking advantage of word-of-mouth marketing (Alpargatas, 2019b). For further distribution and expansion efforts, Havaianas has also been developing its travel retail presence through opening pop-up stores in highly busy airports, especially those in between urban and beach areas, also opening flagship stores whenever advantageous in key locations (Ng, 2019).

#### 4.1.1 Brand Architecture and Hierarchy

As previously mentioned, Havaianas is owned by a corporate brand named Alpargatas, which owns multiple other footwear brands, namely Osklen, Mizuno, and Dupé. An understanding of a brand's hierarchy is relevant to analyze the relationships between the different brands in the hierarchy as well as comprehend where decisions arise from to better interpret its motivations. Figure 13 displays the brand hierarchy of Alpargatas and its brands, including Havaianas.



*Figure 13: Brand Hierarchy of Alpargatas*

In regard to brand architecture, Havaianas is considered a branded house, as it denominates one brand only for all its lines and extensions. There are no separate brand names for its products and collections, solely descriptors that differentiate and specify the product alongside the Havaianas brand denomination.

#### 4.1.2 Brand Portfolio

Ever since the beginning of Havaianas' history, the brand has focused on expanding its brand portfolio primarily based on line extensions. The various flip flops may present small differences such as slight changes in color, or bigger differences such as higher heels or closed toes, but they are all products within an already existing brand, Havaianas, in an already existing industry category, footwear. Nevertheless, in recent years, Havaianas has also developed its portfolio through brand extension initiatives. After launching its first brand extension as a clothing collection in 2014 (Mundo das Marcas, 2017), Havaianas has since developed other products as well, such as glasses, bags, beach towels, caps and bucket hats, socks, and other small

accessories and gadgets like brand pins and key chains (Havaianas, 2020d). Figure 14 below exhibits Havaianas' brand portfolio so far.

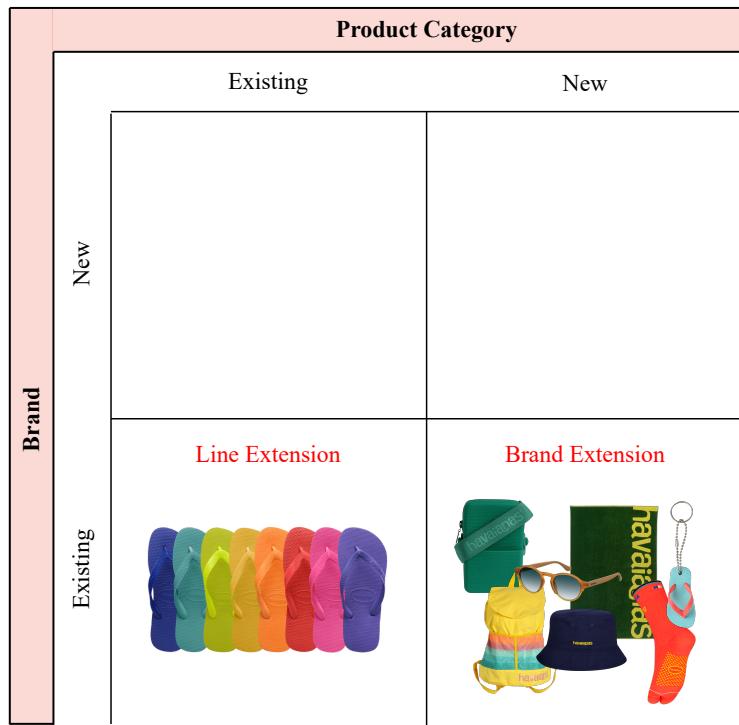


Figure 14: Havaianas' Brand Portfolio

## 4.2. Marketing Programs

Havaianas' marketing mix over the years has shown that a well-elaborated marketing strategy, when correctly applied to the 4 P's which are product, price, placement, and promotion, can lead to constant and successful growth of a brand.

### 4.2.1 Product

When the first Havaianas' flip-flops were released into a newly popular market in the middle of the 20<sup>th</sup> century, the product was very simply designed. The brand sold only one model of flip-flops which were manufactured in white and blue colors and packaged in simple plastic bags. However, despite its aesthetic simplicity, the brand's flip-flops already demonstrated an exclusively sturdy material that, differently from other existing sandals at the time, did not deform nor snap and presented no unpleasant rubber smell as others did. Through the years, however, Havaianas became increasingly popular, and with their popularity the brand started releasing various line extension to conquer the market, with differences in colors, styles, sizes, and patterns. Alongside their merchandise, the packaging was developed as well, changing the public's perception at the time that they were footwear made for individuals in lower social classes to the perception they were footwear for everyone. With this repositioning, Havaianas conquered a large part of its domestic market, and expanded its presence through international

borders as well. With increasing worldwide success, the product categories were expanded into different brand extensions. Currently, Havaianas has a plethora of flip-flop options, multiple merchandise from brand partnerships, and an expanded product portfolio that ranges from clothes to socks, glasses, bags, and other accessories. The brand also develops special editions for different markets it is in, tailoring the offerings to each specific country.

#### 4.2.2 Price

Ever since Havaianas' beginnings, prices have been increased in order to reposition the brand strategically, aggregate value, and expand its presence in the industry to create an ameliorated perception of its products' quality, going from a penetration pricing strategy at first to a premium pricing strategy over the years. Currently, the brand presents a wide price range that varies with the types of product, with increased prices originating from limited editions, customized products, and higher quality merchandise. In its current website, Havaianas USA has products ranging from US\$8 to US\$150 (Havaianas USA, 2020).

Product	Variations	Price Range (in US\$)
Flip-flops		Women, Men, Kids
Clothes <sup>1</sup>		Shirts, Shorts, Dresses, Skirts, Blouses, Pants, Jumpsuits, Swimwear
Glasses		N/A
Bags		Street bags, Mini bags, Backpacks
Beach towels <sup>2</sup>		Towels, 'Cangas'
Hats		Caps, Bucket Hats
Socks		N/A
Gadgets		Pins, Keychains, Floats
<sup>1</sup> Clothes only found in Havaianas Brazil's website, currency converted with exchange rates as of December 3 <sup>rd</sup> , 2020		
<sup>2</sup> Beach towels only found in Havaianas Brazil's website, currency converted with exchange rates as of December 3 <sup>rd</sup> , 2020		

Figure 15: Havaianas products and price ranges

#### 4.2.3 Placement

Havaianas' products can be found in retail stores worldwide, with points of sale in more than 120 countries around all six continents. The brand also has flagship stores in some of its biggest markets, more prominently in Brazil. However, Havaianas has been working to expand its direct consumer approach by developing and expanding its concept stores to other locations as well. In that way, the brand could increase awareness in other markets with higher certainty and control of their image as the flagship stores would develop and reposition Havaianas' awareness internationally. Their products are also sold online through the brand's website in different countries, and popular digital shopping locations too, such as Amazon in the United States and Netshoes in Brazil.

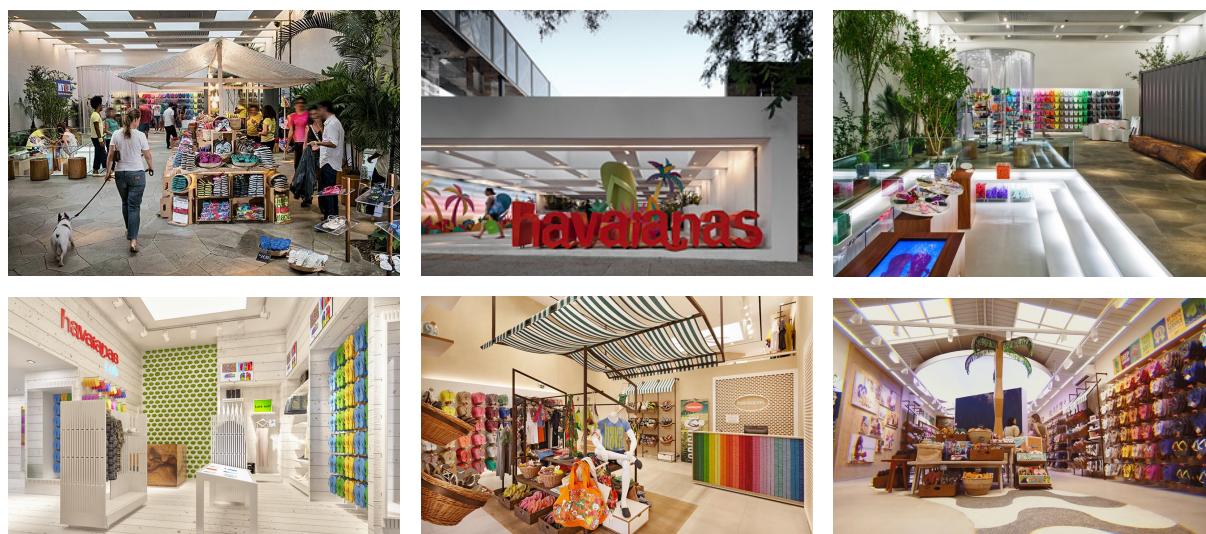


Figure 16: Examples of Havaianas' flagship and concept stores

#### 4.2.4 Promotion

Havaianas' promotional efforts have always sought to be appealing to consumers by providing humor, uniqueness, and cultural connections to its slogans and advertisements. Their singularity has been a focal point of the brand's campaigns ever since its most popular slogan in the 70s, "Havaianas, the legitimates", to the present as well (Mundo das Marcas, 2017). Originally, Havaianas focused on television advertisements, but as technology progressed, the brand updated its promotional strategies, now focusing on multiple co-branding opportunities, as well as celebrity endorsements, and digital media, through hashtags and interaction with customers. Their promotions always seek to highlight the brand's PODs and communicate its originality amongst competitors.

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## Appendix

### Q1. Dear Participant,

The purpose of this survey is to investigate consumer sentiment toward flip flop brands. The survey is **anonymous** and should take about **2-4** minutes. Respondents must be over the age of 18 years. You can **terminate** the survey at any time. You can select your preferred language at the top right drop-down menu. If you accept the terms, please continue. Thank you for your participation.

- I accept the terms. (1)
- I do not accept the terms. (2)

### Q2. Name up to 5 brands that come to your mind which **sell flip flops or casual sandals**.

Brand 1 (1) \_\_\_\_\_

Brand 2 (2) \_\_\_\_\_

Brand 3 (3) \_\_\_\_\_

Brand 4 (4) \_\_\_\_\_

Brand 5 (5) \_\_\_\_\_

### Q3. How **familiar** are you with the following brands?

	Not familiar at all (1)	Slightly familiar (2)	Somewhat familiar (3)	Moderately familiar (4)	Extremely familiar (5)
Brand 1 (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand 2 (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand 3 (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand 4 (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand 5 (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Havaianas (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q4.** How do you **feel** about the following brands?

	Hate it (1)	Dislike it (2)	Neutral (3)	Like it (4)	Love it (5)	Don't know (6)
Brand 1 (1)	<input type="radio"/>					
Brand 2 (2)	<input type="radio"/>					
Brand 3 (3)	<input type="radio"/>					
Brand 4 (4)	<input type="radio"/>					
Brand 5 (5)	<input type="radio"/>					
Havaianas (6)	<input type="radio"/>					

**Q5.** List **three words** that come to your mind when you **think about** these brands.

- Brand 1 (1) \_\_\_\_\_
- Brand 2 (2) \_\_\_\_\_
- Brand 3 (3) \_\_\_\_\_
- Brand 4 (4) \_\_\_\_\_
- Brand 5 (5) \_\_\_\_\_
- Havaianas (6) \_\_\_\_\_

**Q6.** How do you **perceive** the **price** of the following brands?

	Very cheap (1)	Cheap (2)	Average (3)	Expensive (4)	Very expensive (5)	Don't know (6)
Brand 1 (1)	<input type="radio"/>					
Brand 2 (2)	<input type="radio"/>					
Brand 3 (3)	<input type="radio"/>					

Brand 4 (4)	<input type="radio"/>					
Brand 5 (5)	<input type="radio"/>					
Havaianas (6)	<input type="radio"/>					

**Q7.** How do you **perceive** the **quality** of the following brands?

	Poor (1)	Fair (2)	Average (3)	Good (4)	Excellent (5)	Don't know (6)
Brand 1 (1)	<input type="radio"/>					
Brand 2 (2)	<input type="radio"/>					
Brand 3 (3)	<input type="radio"/>					
Brand 4 (4)	<input type="radio"/>					
Brand 5 (5)	<input type="radio"/>					
Havaianas (6)	<input type="radio"/>					

**Q8.** How **likely** is it that you would **recommend** the following brands to someone?

	Unlikely (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	Likely (10)
Brand 1 (1)	<input type="radio"/>									
Brand 2 (2)	<input type="radio"/>									
Brand 3 (3)	<input type="radio"/>									
Brand 4 (4)	<input type="radio"/>									
Brand 5 (5)	<input type="radio"/>									

Havaianas (6)	<input type="radio"/>										
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**Q9.** How often do you purchase a product from the following brands?

	Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Always (5)	Don't know (6)
Brand 1 (1)	<input type="radio"/>					
Brand 2 (2)	<input type="radio"/>					
Brand 3 (3)	<input type="radio"/>					
Brand 4 (4)	<input type="radio"/>					
Brand 5 (5)	<input type="radio"/>					
Havaianas (6)	<input type="radio"/>					

**Q10.** What is your age?

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Male (1)

Female (2)

Prefer not to say (3)

Other (4) \_\_\_\_\_

**Q12.** In which country do you currently reside?

▼ Select from dropdown list (1) ... Zimbabwe (196)