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AUTHORS

Natalia Vila López
Inés Küster Boluda

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INTERNATIONAL POSITIONING OF LEADING BRANDS THROUGH INTERNET: GLOBALIZE OR DO NOT GLOBALIZE?¹

Natalia Vila López*, Inés Küster Boluda**

Abstract

The scope of the present paper addresses the relationship between corporate expansion on an international scale and the positioning strategy of leading brands via the Internet. The present study takes another look at the standardisation-localisation debate and analyses the online positioning in an international context. An analysis of the web pages of leading brands presented simultaneously in both the English and Spanish markets allows us to compare the extent to which the nature of these markets can be understood.

Key words: Content analysis, the Internet, internationalisation, positioning, competition.

Introduction

Past research based on cross-cultural content analysis of advertisements has observed different advertising themes and executional styles (Wang and Chan, 2001, p. 145). As both authors point out, although a globally standardised approach to advertising could have its apparent advantages on international markets, its implementation is not always easy, given that the cultural milieu affects marketing communications and different values may persist in different cultures (Kale, 1991).

However, as Kapferer (2002) explains, in all managerial and consulting circles, and in most business reviews, global brands are the only thing that count, and the process of global branding the only thing worth spending time on. Indeed, all multinational companies are now engaged in a fierce and drastic reduction of their brand portfolios, focusing exclusively on the brands able to be globalised.

This debate permits us to illustrate the problems an enterprise encounters when defining the international positioning of a brand.

In this standardisation-location debate our research tries to analyse online positioning decisions in an international context. Thus, this paper attempts to compare the extent to which the Spanish and English markets can be assimilated from a close observation of the web pages of common marketed brands included in the ACNielsen report.

There are two foundation stones to this paper. Firstly, we look at how the Internet is used in both environments and how this produces an increase in the volume of information dissemination in order to market product brands and also at the development of what is known as "the interactive revolution" (Chiagouries and Wansley, 2000; Lin and Jeffres, 2001; Ind and Rondino, 2002). Secondly, we examine the use of content analysis of web pages as a useful work tool "to understand deep-seated cultural values" (Wang and Chan, 2001, p. 150), especially in the new millennium (Lin and Jeffres, 2001). McMillan (2000) notes, likewise, the challenge of applying content analysis to the Internet, given the greater dynamic environment this affords. We have adopted an online approach as the basis to our research, since this is receiving increasingly more attention from companies interested in creating solid brand names and images in the shortest possible time. Such is the case of Procter & Gamble, General Motors, Barnes & Noble, Toys-R-Us, Gap etc.

* University of Valencia, Spain.

** University of Valencia, Spain.

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(Chiagouries and Wansley, 2000; De Chernatony, 2002). There is no doubt, as Quinlan (1994) maintains that business survival will depend increasingly more on taking advantage of opportunities offered by the Internet.

Theoretical framework and research question

Positioning framework

Brand positioning is a key factor when determining international consumer evaluations. So, once the decision is taken to segment the market, to select one or various segments as target customer groups, the next step is to decide how the product should be perceived in the customers' minds. It is at this stage that the concept of positioning can be introduced. In this sense, we take this to mean the relative place occupied by an object in the target customers' minds. This object can, of course, be replaced by an individual, an idea, an institution, a service, a city or any other entity which may be compared with other competitive references.

The origin of the term goes back to Trout and Ries (1972), who define it as "the differentiated spot occupied by an offer in relation to its competitors in the minds of customers or people whom it is desired to influence (...). Positioning has, therefore, nothing to do with what you make of the product. Positioning is what you do with the target customer". They add in their work "Positioning: the battle for the customer's mind", that "you don't buy coal, you buy heat; you don't buy circus tickets, you buy emotion; you don't buy papers, you buy news....".

More recently Kotler (1997), has stated that positioning is "the act of designing company products and its own image in such a way that they occupy a significant and competitive position in the minds of its target customers". The concept can, therefore, be applied to different organisational levels: firm, product and brand. The latter two have been more frequently the focus of marketing strategy, while company positioning has generally been tied to decisions about competitive strategy. This aspect has been expanded on within the reference frame of Strategic Management by authors such as Porter.

If we now concentrate on product and brand positioning, we should like to stress that the influence of the term has been such that it is considered to be the heart of marketing strategy (Maggard, 1976; Hauser and Simmie, 1981; Wind, 1982; Crawford, 1985; Winer and Moore, 1989; Carpenter, 1989; Sánchez, 1994; Corstjens 1991; Muñoz, 1993; Zineldin, 1996; Marks, 1997). As Hernández, Munuera and Ruiz de Maya (1995, p. 33) note, "the positioning of the product is the cornerstone of company operations and the conditioning factor of customers' perceptions towards this product". Such a definition of the term is more related to marketing and customer perception, which De Chernatony and Dall'Olmo (1997) refer to as *output perspective* (customer viewpoint), as opposed to a concept of positioning based on the supplier, termed *input perspective*.

The study of product/brand positioning has been comprehensively dealt with by authors such as Wind (1982, 1990) and Aaker (Aaker, 1982, 1996, 1998; Aaker and Myers, 1989; Batra, Myers and Aaker, 1996), as well as Arnott and Easingwood (1994) writing specifically about services.

Positioning alternatives

The alternative positioning options of a company for its products and brands are according to Bigné (1986) twofold: general positioning strategy and specific positioning strategy. Both are illustrated in Table 1. Its choice should be made by taking fully into account the category of the product to be positioned and the country in which it is going to marketed (Alden, Steenkamp and Batra, 1999). The choice of commercial strategy may vary considerably depending on the different types of products and geographical areas.

Table 1

Positioning alternatives for products

1. GENERAL STRATEGIES	
Positioning based on the competitor	Maggard (1976); Crawford (1985); Vázquez (1987); Aaker and Myers (1989); Hooley and Saunders (1993); Arnott and Easingwood (1994); Kalra and Goodstein (1998); Zhang and Markman (1998); Drumond and Ensor (2001).
Positioning based on the consumer	Crawford (1985); Vázquez (1987); Aaker and Myers (1989); Hooley and Saunders (1993); Arnott and Easingwood (1994); Drumond and Ensor (2001).
Positioning based on social reputation and esteem	Maggard (1976); Arnott and Easingwood (1994).
2. SPECIFIC STRATEGIES	
Positioning based on some special attribute or sensual factor	Maggard (1976); Crawford (1985); Aaker and Myers (1989); Hooley and Saunders (1993); Arnott and Easingwood (1994); Kalra and Goodstein (1998); Drumond and Ensor (2001).
Positioning based on value for money	Aaker and Myers (1989); Hooley and Saunders (1993); Arnott and Easingwood (1994); Kalra and Goodstein (1998); Mulhern, Williams and Leone (1998).
Positioning based on application and context of use	Crawford, 1985; Aaker and Myers (1989); Hooley and Saunders (1993); Arnott and Easingwood (1994); Petrecca (1998); Drumond and Ensor (2001).
Positioning according to product category	Crawford (1985); Aaker and Myers (1989); Hooley and Saunders (1993); Drumond and Ensor (2001).
Positioning based on cultural symbols	Aaker and Myers (1989); Miquel, Newman and Bigné (1993); Kim and Chung (1998); Alden, Steenkamp and Batra (1999); Drumond and Ensor (2001).
Positioning based on world culture	Alden, Steenkamp and Batra (1999).
Surrogated positioning	Crawford (1985).
The product is exclusive	Crawford (1985); Kalra and Goodstein (1998).
The brand has a prestigious lineage (manufacturer, retailer etc.)	Crawford (1985).
Outstanding manufacturing process (ingredients, design)	Crawford (1985).
The product is a best selling item	Crawford (1985).
Product endorsement. It is used by people you respect	Crawford (1985); Kalra and Goodstein (1998).
Experience If you use it, it performs as advertised	Crawford (1985).
The product has historical precedents	Crawford (1985).
The product has symbol identification	Drumond and Ensor (2001).
Confused positioning	Kotler (1997); Alden, Steenkamp and Batra (1999).
Underpositioning	Kotler (1997); Drumond and Ensor (2001).
Overpositioning	Kotler (1997); Drumond and Ensor (2001).

Source: The author based on Bigné (1986) and Miquel and Bigné (1987).

Of the general strategies outlined, there are basically three positioning options according to whether emphasis is laid on the competitor, the consumer or society.

1. *Positioning strategy based on the competitor.* The product is defined implicitly or explicitly in comparative terms with what the main competitors are doing. The aim is either to distance them (Kalra and Goodstein, 1998), or to get closer to them, since

they may have a better reputation (Crawford, 1985; Kalra and Goodstein, 1998) or have complementary product characteristics (Vázquez, 1987).

2. *Positioning strategy based on the consumer* lends itself to highlighting the product in terms of target consumer needs and tastes (Crawford, 1985; Aaker and Myers, 1989; Hooley and Saunders, 1993; Arnott and Easingwood, 1994). It draws a distinction between non-differentiated positioning, if the market is not segmented, differentiated if different consumer groups with homogeneous traits are targeted, and concentrated, if the aim is to target a single group only.
3. *Positioning strategy based on social responsibility or stream* defines the product in terms of general consumer requirements (Maggard, 1976; Arnott and Easingwood, 1994). In such cases, appeal is made to the concern for the environment or the rejection of political corruption. With this approach there are contingent social benefits and esteem for the supplier and the product supplied.

Specific positioning strategies are derived from the three general strategies described above. Once the general strategy has been defined, be it competitor, consumer or socially oriented, the next step is to define a series of specific tactical policies to achieve the desired product perception in the consumer's mind. Each specific objective needs to take the following specific measures regarding positioning (Aaker, 1982; Bigné, 1986):

1. *Positioning based on certain attributes*: The brand is associated with different tangible prompts which may be sensually perceived.
2. *Positioning based on quality* highlights the attributes of brand excellence.
3. *Positioning for specific brand use and purpose* attempts to associate the brand name with positive connotations (present, daily use, special occasions etc.).
4. *Consumer-oriented positioning* allows consumer to identify themselves by association with the brand name.
5. *Positioning related to product type* relates the brand name to others of the same category and emphasises the underlying similarities of use.
6. *Positioning based on cultural symbols* associates the brand name with the culturally identifying symbols of its country of origin.
7. *Positioning based on world culture* disassociates the brand name from its cultural origins and promotes the idea of the global consumer and transnational marketing.

Together with these specific positioning options traditionally put forward by literature on the subject, it would be pertinent to add a generic category termed *surrogated positioning* (Crawford, 1985). This refers to a group of alternative options which convey instantly the idea behind which the brand name is positioned. In this way, the following messages are conveyed:

1. *The brand is exclusive* and there is nothing comparable on the market.
2. *The brand has a prestigious lineage* thanks to which the factory sells and distributes.
3. *The brand is outstanding* as a result of special production processes (design, ingredients etc.).
4. *The brand is a best-seller* and is top of the sales table.
5. *The brand is endorsed by the famous and the respected*, as a result of which there is a subjective source of guarantee.
6. *The brand used frequently* ensures advertised performance.
7. *The brand has historical precedents*, which are exploited as points of reference.
8. *The brand has symbol identification* (logo, brand initials etc.).

However, there are three negative situations which result in consumer aversion to the product or brand name (Kotler, 1997):

1. *Confused positioning*: there is constant modification of the positioning strategy and the consumer, therefore, does not consistently perceive what makes the product different. This confusion does not encourage purchasing or consumption habits.
2. *Underpositioning*: in such a situation the consumer has a very limited perception of the brand name and cannot find in it any distinguishing features.

3. *Overpositioning*: the opposite is the case here. The consumer has overblown expectations of the brand and after-sales dissatisfaction leads to a vote of no confidence in the product.

In conclusion, in order to position a product the first thing to do is to choose a general action plan (competitor, consumer or society). Following this, positioning strategies are formulated which contribute to the achievement of marketing objectives. These series of steps, need to be complemented by two important considerations.

Firstly as regards general strategies, although we may choose a single framework for defining specific actions, we should not overlook other possible scenarios. For this reason, the competitor, the consumer and society should be seen as essential parts of the same cog and these parts are more or less important according to variable circumstances. A good functional rapport among all the parts is vital, since "success is a multidimensional construct which takes into account the plurality of factors" (De Chernatony, Dall'Olmo and Harris, 1998, p. 770). Specialised literature on this subject is giving increasing importance to the integration of these component parts, and is conciliatory with partial viewpoints such as marketing orientation (the consumer) or competitor orientation (Narver and Slater, 1990; Kohli and Jaworski, 1990). In fact, the well-functioning of component parts has a great deal to do with the success or failure of a product, as highlighted by Santos and Vázquez (1998, p. 80) in the context of new product launches undertaken by 78 high-technology companies.

Secondly, concision is advisable for specific strategies and a clear choice of option has to be made in order to avoid obscure, confused or hazy positioning strategies which result in ambiguous brand perceptions (Kotler, 1997; Alden, Steenkamp and Batra, 1999).

Globalisation versus adaptation

Rugman (2001, p. 13) supports the idea of a "misunderstanding about globalisation in believing that MNEs develop homogeneous products for the world market and through their efficient production techniques are able to dominate local markets everywhere. The reality is that multinationals have to adapt their products for local markets". This line is also supported by authors like Ghose y Lowengart (2002) and Fan (2002).

Such a claim goes against more traditional notions in favour of standardisation, such as Levitt's observation, (1983) which points to "an extreme position on standardisation as the answer to globalisation forces". This was probably the most noted contribution and spurred reactions from many writers (Solberg, 2000). In spite of this, and following Levitt's proposal, Kapferer (2002) notes that "in all managerial and consulting circles, and in most business reviews, global brands are the only thing that count, and the process of global branding the only thing worth spending time on. Indeed, all multinational companies are now engaged in a fierce and drastic reduction of their brand portfolios, focusing exclusively on the brands able to be globalised" ().

Between both extremes Quelch and Hoff (1986) suggest that there exists a continuum of decision framework used in formulating international strategy. In this sense, De Chernatony, Halliburton and Bernath (1995) support that when considering which elements of an international brand to standardise or adapt, it is helpful to consider the brand's two components: the core concept and its execution. So, both extremes could be avoided, given that the core essence of the brand would be maintained, only adjusting its local execution.

By bringing all these strands of thought together and by focusing on the Spanish and English markets, whose languages of habitual use are two of the most widely-spoken in the world, we based on the following idea: Spanish market is simply less mature than the US market. Therefore, Spanish sites would likely focus more on activities associated with market growth, educating people to the market, positioning based on the consumer. US sites would place relatively more focus on winning and defending market share, focusing more on positioning based on the competitor. This led us to the following research question:

Q1: Spanish sites would likely focused more on consumer, while US sites would place more focus on competitor.

Methodology

As previously stated, this paper attempts to compare the positioning strategy in environments where different languages are spoken, namely English-speaking countries and Spanish-speaking countries. To do this, different web sites have been compared, basically North American web sites of a group of brands and Spanish web sites of the same group of brands.

Sampling

The sample used for this study is made up of the global brand names included in the ACNielsen report. These names have two characteristics: (i) they have a turnover of 1.000 million dollars and (ii) are sold world-wide. Nevertheless, the sample of 43 names has been reduced to reflect this paper's exclusive concern with brand names presented simultaneously on Spanish and English web pages. 31 brand names were, as a result, retained in two languages and for research into two markets (the USA and Spain). We can see that in this final sample there is a predominance of companies commercialising several brand names. For example, Pepsi Cola has 6 brand names under study (Pepsi Cola, Tropicana, Lay's, Doritos, Gatorade, Seven Up), Procter & Gamble has 4 (Always, Pringles, Pampers and Pantene); Coca-Cola has 4 (Coca-Cola, Fanta, Sprite, Minute-maid), Gillette has 2 (Duracell and Gillette); Nestlé has 2 (Nescafé and Friskies). This is the reason why, in some cases, some brands are to be found under the group's web page instead of having a web page of its own.

Information source: the Internet

Consumer perceptions and attitudes within different countries towards a product are to a large extent determined by the marketing mix designed by the companies operating globally. These marketing mix characteristics are highlighted by international communication. A key tool in this is the Internet, given its global accessibility and range (De Chernatony, 2002). The consumer can, as a result, access to information about the product, its packaging, formats, sizes, brand names, prices, sales outlets or special offers. In fact, current thinking has it that if a brand name does not feature on the Internet, then "in this new millennium, it is perceived as insufficiently innovative, opaque, self-centred and autarchic (Cerviño, 2002). As the author puts it "in recent studies carried out by the Internet Advertising Bureau and the research firm Myers Report, in which hundreds of management directors were interviewed on the use of the Internet for advertising purposes, it is evident that online advertising is becoming an increasingly frequent and powerful advertising tool for enhancing brand image" (Cerviño, 2002, p. 192). Similarly, Ward and Lee (2000) concur than "a strong brand is not enough; you need good information, too Brands will remain and, in some ways, become more important. But the traditional product branding model is losing its power. The Internet represents one place where product branding is eroded and joins media fragmentation and production technology as nails in the coffin of classical brand management".

For these reasons, the information on the brand names used in this study for Spanish and English areas of operation, comes from the relevant companies' web pages in the two languages. Thus, we have studied the web sites of leading world brands in Spanish (principally in Spain) and in English (principally the USA). The reason for differentiating between these two sets of web sites is that consumers prefer advertised brands if the cues concerning the brand in the advertisement theme are consistent with his or her self-schema (Wang and Chang, 2001). Such web sites linked to specific countries and languages are accessible from corporate/business web sites, which, apart from allowing the perusal of a specific language or country's web page, enhances company image and public relations, attracts customers and helps them to browse products and services, and get consumer feedback on any number of issues. This is the conclusion reached in the paper by Maddox, Darshn and Dubek (1997), based on the home pages of Fortune 500 companies.

The use of online information gathering is also justified by the increasing use of the Internet in product marketing and in the development of what is now known as “the interactive revolution” (Chiagouries and Wansley, 2000; Lin and Jeffres, 2001; Ind and Rondino, 2002). According to recent studies (Chiagouries and Wansley, 2000), there are no significant differences between creating a brand name online and via the more traditional channels. The only advantage of using the Internet lies in the greater speed with which prospective customers can become real ones, thereby converting market potential into purchasing reality. This sequence is sometimes referred to as the AIDA approach, affording a transition from Awareness, to Interest, to Desire, to Action). Lin and Jeffres (2001) contrast the use of the different media (the press, radio, television...) empirically and conclude that companies have a relatively distinctive content emphasis, while each attempts to utilise its web site to maximise institutional goals.

However, comparative studies of web pages are a recent departure, albeit potentially invaluable, as is evident from the number of studies examined by Lin and Jeffres (2001), who narrow down the online media into four dimensions: credibility, liking, quality and representativeness.

Marketing information obtained

For each brand name, the web page contents related to its positioning strategy were classified into 3 possible options: general positioning strategies, specific positioning strategies and subrogate positioning.

The different brand names were also classified according to product category (Financial World, Interbrand DBK 1997). In line with Bearden and Etzel (1982), the brand names studied correspond both to product categories, for which reference group influence is limited (batteries, hygiene etc.) and to product categories, whose choice is strongly influenced by group reference pressure (refreshments, crisps and snacks etc.). The use of the product category is relevant because the influence exercised by the brand name in the process of purchasing and consumption is different for each product category (Chen, 2002).

Coding procedures

To ensure more reliable results and prior to statistical analysis, each web page was assessed independently by two purposely trained judges (doctoral students), proficient equally in Spanish and English. Discrepancies were resolved through discussion between the participants following Holsti (1969) procedure. The procedures emulated previous studies (Frasquet, Küster and Vila, 1995), and more specifically studies based on the application of content analysis of the Internet (Lin and Jeffres, 2001).

Several statistics are available to verify that coding agreement between judges is due to the reliability of the coding scheme and not random chance. We used Kappa (Cohen, 1960), a statistic to measure the agreement between two analysts that have coded the same variable. At the point, our kappa values for mostly of the variables were 0.6 or higher. This is generally considered sufficient to indicate that chance alone is not accounting for the agreement. In those exceptional cases where the Kappa values were lower than 0.6, the coding procedure was reinitiated to achieve higher values. The suitability of using content analysis in cross-cultural studies can be seen in other recent studies by Wang and Chan (2001) or Lin and Jeffres (2001) among others.

Results

Before contrasting the research question that we have formulated, it would be pertinent to briefly describe the sample of brand names studied. The idea is to begin to discover, via secondary sources of information, the variables linked unambiguously to the volume of brand name sales. The volume of sales has, for this purpose, been divided into four different categories: (i) over \$ 15,000 m., (ii) between \$ 5,000-15,000 m.; (iii) between \$ 3,000-5,000 m.; (iv) between \$ 2,000-3,000 m.; (v) between \$ 1,500-2,000 m.

Firstly, there is a significantly negative correspondence (-0.23 , $p=0.05^{**}$) between the number of countries where the brand name is sold and the volume of sales achieved by the same brand name.

This means that there is no correlation between the number of countries commercialising the brand name and increased volume of sales. It seems reasonable to conclude that the key to successful global operation has more to do with the geographical and cultural affinity with a few selected target markets, rather than blanket coverage of all the international markets. This assumption is also support for two additional ideas. On side, some products lend themselves to the needs of people in many different countries, but these tend to be specialized functional products – categories with relatively lower sales volume. On the other side, given that most of the brands belong to American companies, they have high sales just because of their huge domestic market, and few global extensions simply because they have relatively little incentive. By contrast, the minority of non-US companies analysed in this study, whose domestic markets are not as attractive, might be forced to extend into many different markets, and still not have the volume available to American companies.

Secondly, the relationship between the most successful market commercialising the brand (the USA versus Europe) and the volume of sales achieved by each brand is significantly ($\chi^2=6.46$, $p=0.01$ *) in favour of the United States. This means that brands whose biggest market is America sell substantially more than brands whose biggest market is Europe, due, perhaps, to the greater size of the American market.

Thirdly, if we relate the product category pertaining to each brand name with the sales volume achieved, we can again point to a significant correspondence of both variables ($\chi^2=35.49$, $p=0.01$ *). There are, in fact, some brand names with greater sales volumes belonging to product categories such as "personal hygiene" and "food and cereals", while other product categories achieve substantially lower sales volumes. Such is the case of "refreshments", "photography and optics" and "electronic goods".

To round off this descriptive analysis, we can also observe that the product category for each brand name is closely linked, apart from sales volume, to the following variables. Firstly, there is a link with the biggest market (USA versus Europe) in which each brand is commercialised ($\chi^2=35.49$, $p=0.01$ *). Thus, there are higher sales volumes in categories such as "coffee" and "confectionery" on the European market, and a bigger turnover in categories such as "refreshments", "food and cereals" and "personal hygiene" on the American market. Secondly, there are significant differences between the web pages used ($\chi^2=28.9$, $p=0.010$ ***). We can, thus, see a predominance of interactive web pages in categories such as "refreshments", "coffee" and "food and cereals". Conversely, e-commerce web pages predominate for categories such as "photography and optics" and "electronic goods". Finally, merely informative web pages feature more prominently in "other product categories".

With regard to web pages, the methodology used to compare the divergences between both language environments, English and Spanish, was again the contrast χ^2 . This endorses previous studies by, for example, Wang and Chang (2001), who use this technique in international settings in order to contrast the presence of significant differences among countries. In our paper, the frequency with which different positioning strategies were present and absent on web sites in English and web sites in Spanish was compared. The independent variable was English webs *versus* Spanish webs. The dependent variable was different for each analysis.

Firstly, with regard to the general positioning strategies our results indicate that in both markets the less frequently used option is the *positioning strategy based on social responsibility or esteem*. In addition, we should note that, although the inter-nation difference was not statistically significant ($\chi^2=0.77$, $p=0.679$), the *positioning strategy based on the consumer* is more often used when the brands are directed to the Spanish target (71%) than when they are directed to the English target (61%). On the opposite side, the *positioning strategy base on the competitor* is more accepted in English market (32%) than in Spanish one (25%). These results would indicate that when comparing the English target with the Spanish target, the former will usually prefer comparative ads based on competitor's product and the later will usually choose brands specifically positioned based on consumer characteristics. This result seems to confirm our proposed research question.

Secondly, and to improve our results we have measured country differences with regard to specific positioning strategies. Our results could be summarised in the following points.

1. For the Spanish target, the most common specific positioning strategies are: positioning for specific brand use and purpose (35.5%), positioning based on consumers (16.1%), positioning based on certain attributes (12.9%), and positioning based on quality (12.9%). For the USA target the most common specific positioning strategies are: positioning based on quality (25.6%), positioning based on results (22.6%), and positioning for specific brand use and purpose (19.4%).
2. In both markets some options like positioning related to product type, positioning based on cultural symbols or positioning based on world culture are rarely used.
3. In spite of these results, inter-nations differences were not statistically significant ($\chi^2=4,95$, $p=0.66$).

Thirdly, with regard to surrogated positioning strategies the following main results have been obtained:

1. For the Spanish target, the most common subrogated positioning strategies are: *the brand has a prestigious lineage* (35.5%), *the brand is a best-seller* (22.6%) and *the brand is outstanding* (16.1%). For the U.S.A. target the first places are for *the brand has a prestigious lineage* (25.8%), *the brand is outstanding* (22.6%) and *the brand is a best-seller* (19.4%).
2. In both markets some options like *the brand is endorsed by the famous and the respected* and *the brand has historical precedents*, are rarely used.
3. As with specific positioning, in spite of these results, inter-nations differences were not statistically significant ($\chi^2=2,42$, $p=0.78$).

Conclusions and managerial implications

We can conclude, therefore, that the sample of brands analysed could be considered mature brands given that they represent the best-selling brands world-wide in terms of volume of sales. So, the webs for these brands are designed "more to remind and reinforce than to communicate product benefits" and, consequently, the transfer of a global appeal across borders is possible (Pae, Samiee, Tain, 2002, p. 178), as has been probed.

On the whole, and irrespective of Spanish and American cultural differences, the results obtained point to the following key observations. First of all, higher sales volumes are not necessarily the result of operating in a large number of countries, since the brands with the highest turnover are not those present on the largest number of markets. Secondly, it appears that the world's leading brands in terms of sales, operate predominantly on the American market. Thirdly, sales are outstandingly higher in the product categories of "hygiene" and "food and cereals". Fourthly, e-commerce web pages are more heavily subscribed for products relating to "photography" and "electronic goods and optics".

More specifically, and related to web sites content, we started out with the assumption that web sites in English and web sites in Spanish would differ in positioning strategy. As we have observed, the same brands in both environments are truly global in nature in complying with Levitt's (1983) approach to standardisation in world markets. Thus, we are basically in agreement with the findings of Moore, Fernie and Burt (2000), which endorse the view that, to reinforce the Levitt approach to global marketing, communication strategies ensure global advertising campaigns with standardised brand images across national markets. The reason probably lies in the fact that the brands studied are the world's leading brands in terms of sales volume and present in markets world-wide, as pointed out in the Nielsen report.

If the brands featured in our study had not been so well-known internationally, the standardisation of their positioning strategy would perhaps have been lower. As Solberg (1989, p. 83) points out, "the lack of knowledge is often manifested by a heavy dependency by the firm on the market knowledge of the local representatives", which makes the process of standardisation during the

early stages of the product's global life that much more difficult. Subsequently, "headquarters may find it necessary to develop an *esprit de corps* throughout the whole organisation to facilitate the introduction of a standardised marketing program" (Solberg, 1989, p. 94).

The above conclusions devoted the following managerial implications:

Firstly, although some of the inter-nation differences were not statistically significant; our research question was statistically corroborated: Spanish companies tend to focus on consumers while American companies pay more attention to competitors. So, we could conclude that Spanish and American markets should not be treated homogeneously when developing international business. In this sense, when designing the virtual positioning of one brand, the variables concerning product information should not be standardised between countries in all the cases. However, this is not the election of some of the brand names analysed in our study, such as, for example, Pampers, Pantene (Procter & Gamble), Loreal, Energizer, Duracell and Gillette.

Secondly, and related to previous implication, we should remember that the definition of a company's competitive positioning is relative. Competitive strategy becomes meaningful when seen in comparative terms. Thus, good or poor performance is not sufficient; you have to perform better than those competitors of your country whose competitive capacity is strong enough to influence strategic decision taking. What is clear is that in the present highly competitive markets, because of lack of time and resources, it is virtually impossible to formulate business strategies by taking into account all sector competitors. It makes more sense to focus attention on a specific competitor that would differ in American and Spanish market. This enables the company to analyse competition strategies in greater detail and in a more objective way than rely merely on intuition. As has been showed, this is especially true for the North American companies when operating in the mature and highly competitive North American market.

Thirdly, the positioning strategy of one brand in one country is consistent but not static. The appearance of new competitors, the disappearance, or the reorientation of others entails a restructuring of competitive strategy. It is clearly advisable to examine the competitive environment frequently and closely, since competition is becoming increasingly more dynamic.

A fourth point of interest is related to the methodology used: content analysis. We want to remark that strong commonality across judges in the positioning items associated to each brand supports the idea that perceptual schemas are not idiosyncratic, but widely shared across strategists. The explanation of this high agreement between judges could be found in the mature nature of the analysed brands, and also in the amounts of information shared by the agent. As Reger and Huff (1993) point out, subjects interact with each other; they share similar sources of information (...). All of this could explain the lack of generality in the results previously obtained by De Chernatony, Daniels and Johnson (1993) in an industry that is considered "tightly defined".

Fifthly the study of international competitive positioning allows market niches or exploitable business opportunities to be identified in different nations. In this way, content analysis helps to pinpoint market openings, launch new products or help to redesign others. Moreover, the identification of "saturated" areas enables us to shift the firm's activities to less densely competitive ones in order to increase its market share.

Sixthly, although it is vital to be aware of how consumers perceived competitive positioning, the role played by manager's perceptions is no less important. Thus, when specific positioning decisions for a particular country are going to be formulated, the opinion of the brand managers and other well prepared professionals should be taken seriously into account. The positioning of the product is, thus, determined to a great extent by the way the market views competition among brands but without forgetting supply influence. So, as we have seen, web designers have much to do on consumer's perceptions. The way a company wants to be seen influences the final opinion of its market.

In addition, we insist in that companies should begin to grant the Internet the importance it deserves in the definition of expansion and competition strategies in three fundamental areas: internal

company practice, purchasing-supply strategy and sales-consumer strategy (Cerviño, 2002). For this reason, no positioning strategy should be developed without taking into consideration the possibilities of the World Wide Web. In a few years, those companies that do not communicate virtually will not survive, because they will be competitively unadvantage.

Lastly, and as has been highlighted, our recommendations should not be directly extended to managers belonging to more undeveloped brands and more innovative sectors. That is, when developing international brands "managers should recognize the virtue of patience, undertaking market research programs, rather than making overly fast decisions based on poor information" (De Chernatony, Halliburtony and Bernath, 1995, p. 20).

Future research lines

With regard to following research lines, and as Wang and Chang (2001, p. 157) point out, "the crosscultural content analysis of advertising commonly uses country or culture as the unit of analysis but often ignores individual differences within the culture. Such a homogeneous assumption of culture may mask the within-cultural differences across consumer segments".

Also, further research could extend the range of items examined and the number of brands analysed, and also it would be worthwhile to examine non-linguistic visual elements, such as logos and symbols.

It would also be interesting to study the cooperation/association links between the brands studied or their result levels in order to understand better the competitiveness between them in each country. Finally, a follow-up of the evolution in time of the relationships analysed could serve to introduce a dynamic perspective into the analyses carried out.

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