International Retailing of ‘Made in Italy’ Products: the Results of an Observational Research Study in French and UK markets.

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Abstract

This paper analyzes the internationalization process towards European markets of Italian firms producing high symbolic value goods (fashion, furniture, food sectors). The analysis focuses upon the role of the brand and “made in” for Italian firms at the point of sale level. Using an observational approach methodology, the research investigates 3 stores located in French market and 3 stores located in UK-Scottish market, in order to highlight the marketing role of brand and ‘made in’ at the point of sale level. Finally the authors try to provide useful insights related to internationalization retailing strategy of companies that have to manage their brands and CoO simultaneously.

Introduction and objectives.

The research aims to analyze the internationalization process towards European markets undertaken by Italian firms producing high symbolic value goods (fashion, furniture, food sectors). The analysis focuses upon the role of the brand and "made in" for Italian firms within the French and UK-Scottish markets; the research specifically takes into account the point of sale perspective. For goods with high symbolic value, the brand incorporates the image of the product, and often the value of 'made in', together with the specific identity of the producer. It is also relevant to consider the store as the physical place where brands meet customers and the place where competition is greatest between brands. Furthermore Italian companies are moving from an indirect market presence to a more direct contact with the ultimate consumers through the stores.

Empirically the research focuses upon a group of Italian brands belonging to the Furniture, Apparel & Food sectors. Using an observational approach methodology, the research investigates a set of mono-brand and multi-brand outlets located in French and UK-Scottish markets, in order to highlight the marketing role of brand and 'made in' at the store level. Through the analysis of results from the Italian example, the authors provide useful insights related to internationalization retailing strategy of companies that have to manage their brands and CoO simultaneously.

Literature review.

Brand and Store. As known, a brand may influence customers' perceptions and attitudes in several ways. It is commonly accepted that the brand usually represents the memory of a firm, which encompasses all of the investments, research activities, and process technologies or innovations the firm carries out over time (Rego, Billett & Morgan, 2009). Nevertheless, customers may use brands as a vehicle or mode of expression of attitudes, individualism, and needs (Keegan, Moriarty & Duncan, 1992). According to Keller (2008), brands can simplify choices, be synonymous with a particular level of quality, reduce risk and generate trust. Furthermore the image of a brand is characterized in the consumer's mind by a set of associations (Keller & Lehmann, 2006; Keller, 2008). In this perspective, the brand meaning can be formed through functional elements of performance or more abstract elements related to the imaginary (Keller, 1993). Consumers search for emotional elements, which are sometimes anchored in socio-cultural trends towards which customers feel a sense of belonging (Fournier, 1998). They research emotional elements when they are tangible and objective elements play a secondary role. Therefore, firms attempt to create a symbolic universe surrounding their products as a way to reinforce consumers' brand loyalty (Belk, 1988; Wallendorf & Arnould, 1988). According to this, the comprehension of "brand personality" becomes important. Cook (1992) believes that the relationship between the brand and the consumer reflects several features similar to an affective relation between individuals. Aaker (1997), in her seminal work, defines brand personality as "the set of human characteristics associated with a brand". Firms increasingly attempt to personify their brands with the purpose of enabling consumers to reflect their personality through brand choice. In addition, Grandi (1987) emphasizes that a consumer's perception of a brand is that of a personified image, built up in a symbolic manner partly through the virtue of the communicative effort firms undertake.

Considering the competitive patterns of many firms (particularly in clothing and fashion sectors) it is possible to see that businesses are trying to play at multiple levels of the supply chain, creating paths of vertical integration (Hisey 2002). Companies are opening monobrand stores to directly sell their goods overlapping product and retail brands. This strategic choice is linked to the phenomena of store loyalty and brand loyalty relationships (Castaldo 1994, Lugli, Pellegrini 2005, Lugli 2007). At the same time the development of distribution strategies based on multi-brand store formats seems to be relevant to balance the growth strategy of many firms (especially their international market penetration). In both cases (monobrand and multibrand store formats) the ability to generate an effective brand experience is largely based on the companies' ability to harmonize their brand and distribution strategies; point of sale is one of the main experience providers that delivers this outcome (Burresi 2005). According to this, Pierre Martineau proposed the idea that also stores have a personality, that he states as "the way in which the store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes" (Martineau, 1958, p. 47). In particular, store personality is defined as the mental representation of a store on dimensions that typically capture an individual's personality (d'Astous, Lévesque, 2001). It must therefore be contrasted with the concept of store image that encompasses all dimensions associated with a store, including those dimensions that do not correspond to human traits (e.g., product selection). Store personality must also be differentiated from brand personality because the information sources that are used to infer the personality of a store are likely to be different.

International retailing. A widespread literature has been developed since the seminal work of Hollander (1970). Already in the '70s one of the categories of international retailers defined by Hollander was "dealers in luxury goods" and this definition already confirmed that luxury goods manufacturers were amongst the first companies to create a retail network and to expand it in the main world cosmopolitan cities during the end of the XIXth century and the beginning of the XXth. These vertically integrated manufacturers and retailers were already capitalising on the reputation of their brands amongst a small group of cosmopolitan customers travelling in the world or present in capital cities. This work introduced one of the main topics developed in the following year in international retailing literature, the possibility to export the competitive advantage of a company. The export of a competitive advantage is commonly accepted as one of the main reasons that can justify internationalization in retailing (Treadgold, 1988; Dupuis, 1991; McGoldrick, 1995). One of the components of competitive advantage is the image and the positioning of the company. Some studies have examined the possibility of transferring the retailer image and positioning at the international level; these studies have generally demonstrated that cultural differences exert a strong influence on the image perception of international retailers and on the positioning of retail brands in different countries (Salmon and Tordjman, 1989; McGoldrick and Blair, 1995; Dupuis and Prime, 1996; Burt and Mavrommatis, 2006; Burt, Johansson and Thelander, 2007; Burt and Sparks, 2006).
Another research stream has analysed the entry modes of international retailers in different countries. McGoldrick (1995) ranks these different entry modes according to the cost of the investment and the level of desired control. The companies' management orientation is one of the main elements that can explain the choice of specific entry modes, so different companies' attitudes have been described by scholars analysing the attitudes towards internationalisation (Treadgold, 1991; Williams 1992; Alexander, 1997; Tatoglu et al., 2003). Internationalization, however, is not a linear process and opportunities can arise and influence the orientations and patterns of companies (Dawson, 2001). In addition, there are other elements that can influence the entry modes of retail companies, such as the resources available for expansion, the cultural and geographical distance of the target country, the experience acquired in the international arena and the market and competitive conditions of the target country (Halliburton et al, 2010). According to the Uppsala model (Johanson and Valme, 1997) companies become more aggressive in their international expansion and more oriented toward cultural and geographical distant markets as their international experience increases.

Country of Origin. The effects of country-of-origin (country-of-origin - CoO) on consumer's perceptions and purchase intentions is a common theme in marketing research (Usunier, 2006; Verlegh et al., 2005; Burt & Mavromatis, 2006; Ahmed & d'Astous, 2008; Bloemer, Brij & Kasper, 2009; Verlegh et al., 2005; Pappu et al., 2007; Godey et al., 2012). The definition of CoO has gained in precision as the interest of the academic world in this issue has spread, thus supporting the economic development of international trade. Initially, the concept of CoO was related simply to that of "made-in" (Dichter, 1962; Schooler 1965, Schooler & Wildt, 1968; Nebenzahl, Jaffe & Lampert, 1997). A clear distinction can now be made between the Country of Design (CoD) and country of manufacture (CoM) (Jaffe & Nebenzahl, 2001; Samiee, 1994). Global companies using brand names to suggest a specific origin, the concept of Country of Brand (CoB) is also apparent (Samie, Shimp & Sharma, 2005). At a more global level, more and more research on CoO has specifically measured the image of the country of origin of goods through the Country-of-Origin image (CoI) (Roth & Diamantopoulos, 2009).

Methodology.

A qualitative research approach was adopted (Craig & Douglas, 2005). The empirical analysis of mono-brand and multi-brand point of sales located in France and UK-Scotland is based on the observational approach (Chisnall, 1986; Troilo, Molteni, 2003). Within the observational approach the authors chose the "mystery shopper observation" (Stucker, 2002), which facilitates an understanding, in real time, of what transpires within service delivery (Wilson, 1998). The on field research analyzes: a) the shopping area, where the point of sales are placed, in terms of typology, location, merchandise vendor mix; b) the mono or multi-brand point of sale, in terms of competitive positioning, layout, environmental elements; c) the role of 'Made in Italy' products within the store merchandise, identifying how they are recalled at the point of sale. The mystery shopping observation was carried out using digital devices for image collection.

For the data collection, a research protocol was drawn and shared by researchers to encompass the main elements of: the area surrounding the store under analysis; the store itself; and the presence of Italian brands, elements that can characterize the Italian brands in the stores.

In term of research design a total of 6 point of sales were analysed (3 in France and 3 in UK-Scotland). The point of sales were selected by a screening process starting from a list of Italian brands present in both markets (Euromonitor Reports and web secondary data research). In each country 1 furniture, 1 fashion and 1 food store were analysed. In terms of format 4 multibrands and 2 monobrands were considered. For the UK market the retail brands were Design Works, Diesel Store, and Sartis; for the French market Calzedonia, Carrefour and Printemps (see Table 1).

Findings and discussion.

Italian brands in the field of food, furniture and apparel are well represented in the retail landscape both in France and in the UK/Scotland, in multibrand stores as in monobrand stores. However, they are often not so visible and their country-of-origin is not well highlighted.

Italian brands are distributed in town center locations, where historically the retail sector has created a strong attraction for local customers and for tourists, but also in more recent out-of-town locations, very often built during the 1960s and 1970s and targeting almost exclusively local customers (see Tables 1 and 2).

The presence of multiple Italian food brands in these locations shows clearly that the knowledge and reputation of some Italian brands is widespread, at least in the UK and in France and that Italian brands have been fully integrated by leading international retailers (see Tables 1 and 2).

The positioning of Italian brands is coherent with the positioning in the home market, at least concerning apparel and furniture; Italian brands in these two sectors adopt a standardized positioning strategy between Italy, France and the UK (see Tables 3 and 4).
The situation is partially different for food Italian brands; they tend to position themselves higher than in the domestic market; in some case, they are not displayed in the normal department for each category, but rather in a specific "ethnic" zone. In this situation, Italian brands tend to position more up market or as "specialty brands" (see Tables 3 and 4).

Italian brands don't invest heavily in their CoO in the two countries under analysis, and this is true both for brands present in multibrand and for monobrand outlets (see Table 5 and 6).
There is insufficient information to explore this finding in depth however some potential hypotheses can be suggested:

- Italian brands may not be fully aware of the strong reputation they enjoy in fields like apparel (outside luxury brands), and food, so they don't consider CoO as an asset for their positioning and communication, at least in France and the UK (see Table 7; Calzedonia monobrand and Carrefour multibrand grocery stores).
- Italian brands may want to position themselves as global brands, not linked to any specific CoO if they intend to address global consumption trends, notably in the fashion sector, where global brands like Zara, H&M, Gap or Mango don't assume any specific nationality but tend to target global consumer segments (see Table 7; i.e. Design Works and Diesel Store cases).
- Italian brands may not have sufficient resources to invest in building a strong global reputation, so they may prefer be part of the branding strategy of multibrand retailers or build their reputation through location and WOM (see Table 7; i.e. Sartis and Printemps stores cases) .

Conclusions: managerial implications and limitations

The research aims to analyze the internationalization process towards European markets undertaken by Italian firms producing high symbolic value goods (fashion, furniture, food sectors). From the research data interpretation we can highlight the following managerial implications:

- There is room in the retail landscape in France and the UK for Italian brands with a distinctive and affirmed personality. If these brands don't have enough resources to develop a monobrand network, or if they intend to test foreign market with a low cost entry strategy, they can reach agreements with multibrand chains that are interested to enrich their assortment and expand their global portfolio or range diversity.
- It is very important, however, to define and follow a clear international strategy to build and defend a clear positioning because the international arena is crowed in all the different sectors. Some companies are strong examples of international or global success even if they didn't have a solid country-of-origin history and reputation at the beginning of their international journey, as it is the case for the Spanish Zara and Mango, the Swedish H&M or the Japanese Uniqlo.

- Italian brands may be too inhibited concerning their CoO, given that the Italian CoO is well reputed in France and the UK for design, refinement, and taste. CoO could help some brands that are not well known in foreign markets to build their reputation, if these brands are active in sectors when the Italian country image can reinforce their positioning.
- Findings from the Food category examples suggest that it may be feasible to at least explore a more premium positioning & pricing strategy in the other categories.
- The evolution of the fashion sector suggests that "global" brands are emerging and that these brands address some global customer segments, independently from their nationality. In this sector, Italian brands can choose to try to become global international brands or to build a differentiated positioning based on their CoO and the reputation of Italy in the field of fashion. This choice depends on the company strategy, but also on the resources available for internationalization, because the creation of a global brand requests huge investments to develop a network system in every main country.

This research has several limitations. It was restricted to six case examples in three categories and in two countries. Also there was not a wholly balanced composition of multi and monobrand stores and it is difficult to find completely comparable output types in each category (e.g. Calzedonia and Diesel). Finally this paper does not fully interpret and analyse the pictures and video gallery corpora collected in the field work.
Hence to amplify the generalizability of the research results, the authors aim to enlarge the number of countries and the point of sales under analysis, including also the use of videography approach in the next research steps.

Table 1: Shopping area analysis

Brand - Retail Brand	Country location	Industry	PoS Typology	Shopping area	Geographical location	Number of PoS in the shopping area	Vendor Mix	Competitive positioning	Made in Italy in the Shopping Area	Commercial traffic	Shopping Atmosphere
Design Works	UK	Furniture	Multibrand	Natural Shopping centre	Urban centre car traffic street	less than 25	Furniture and Restauration	medium	low	low	Historic - Green
Diesel Store	UK	Fashion	Monobrand	Natural Shopping centre	Urban centre pedestrian street	101-150	Fashion and Jewellery	high	low	high	Historic-Contemporary
Sartis	UK	Food	Multibrand	Natural Shopping centre	Urban centre car traffic street	less than 25	Food and Restauration	medium	low	low	Historic
Calzedonia	France	Fashion	Monobrand	Natural Shopping centre	Urban centre pedestrian street	101-150	Fashion and Jewellery	medium	low	high	Historic
Carrefour	France	Food	Multibrand	Planned Shopping centre	out-of-town area	more than 150	Food	medium	low	high	Artificial
Printemps	France	Furniture	Multibrand	Natural Shopping centre	Urban centre car traffic street	more than 150	Fashion and Jewellery	high	low	high	Historic - Contemporary

Table 2: Customer mix

Brand - Retail Brand	Customer nationality Shopping area	Customer nationality PoS	Customer Age Shopping Area	Customer Age PoS	Customer Main target Shopping area	Customer Main target PoS	Customer life style Shopping area	Customer life style PoS
Design Works	National and International	International	All	25-80	Mixed-Professional Student	Married, wealthy, with children, established home	Student	Affluent middle and upperclass
Diesel Store	International	International	All	25-35	Young female	Males, Females	Affluent,Professional, Fashionista	Trendy,cool, androgenous, individual,attitude, sexy
Sartis	National	National	30-80	30-80	Business, Ladies lunching	Business, ladies lunching	Business	Business
Calzedonia	National and International	National	30-60	30-60	All	All	Middle and upper middle class	Upper middle class
Carrefour	National	National	15-80	18-80	Families	Families	Traditional, young, middle class	Middle and low middle class, traditional
Printemps	National and International	National and International	20-90	20-90	Up market	Upper class	brand oriented, fashion sensitive, aspiration towards upper class	Affluent, fashion conscious, brand sensitive

Table 3: Point of sales Analysis

Brand - Retail Brand	Country location	PoS Typology	Location PoS	Format	Assortment	Number of brands	Merchandising prevalence	Competitive positioning	Nearby PoS competitive positioning	Windows (mt)	Sales area (m^2)	Number of storeys	Number of sales people	Commercial Traffic PoS
Design Works	UK	Multibrand	Stand alone	Specialty store	Specialised	more than 20	No Food	High	Very low	10-20	less than 200	2	less than 5	low
Diesel Store	UK	Monobrand	Stand alone	Specialty store	Specialised	1	No Food	High	Medium	6-10	201-500	2	1-3	low
Sartis	UK	Multibrand	Stand alone	Specialty store	Specialised	more than 20	Food	High	Very low	10-20	less than 200	1	less than 5	medium
Calzedonia	France	Monobrand	Stand alone	Specialty store	Specialised	1	No Food	High	Very high	2-5	less than 50	1	1-3	high
Carrefour	France	Multibrand	Stand alone	Hypermarket	Despacialised	more than 20	Food	Medium	High	no windows	more than 4000	1	more than 20	high
Printemps	France	Multibrand	Shop in the shop	Department Store	Despecialised	more than 20	No Food	High	High	more than 50	more than 4000	6	more than 20	high

Table 4: Main Italian Brands sold in the point of sales

	FOOD		FURNITURE	
	Brand Name	Merchandise category	Brand Name	Merchandise category
UK	De cecco	Pasta	Giorgetti	Sofa
	Barilla	Pasta	Flex Form	Light
	Gomo	Tomatoes	Porada	Table
	Cibon	Rice	Foscarini	Light
	Vignola	Rice	Rubelli	Material
	Moretti	Beer	Dedar	Material
	San Pellegrino	Drink	Missoni	Material
	Nostromo	Tuna	Etro	Material
	Griss d'or	Bread Sticks		
	Coelsanus	Pickled Vegetable		
France	Lavazza	Coffee	Gervasoni	Furniture
	Segafredo	Coffee	Zanotta	Furniture
	Barilla	Pasta	Minotti	Furniture
	Nutella	Chocolate	Moroso	Furniture
	Kinder	Chocolate	MDF Italia	Furniture
	Parmigiano Reggiano	Cheese		
	Rana	Filled Pasta		
	San Pellegrino	Water		
	Carapelli	Olive Oil		
	Pietro Coricelli	Olive Oil		
	Riso Gallo	Rice		

Table 5: How Made in Italy is recalled in the point of sale

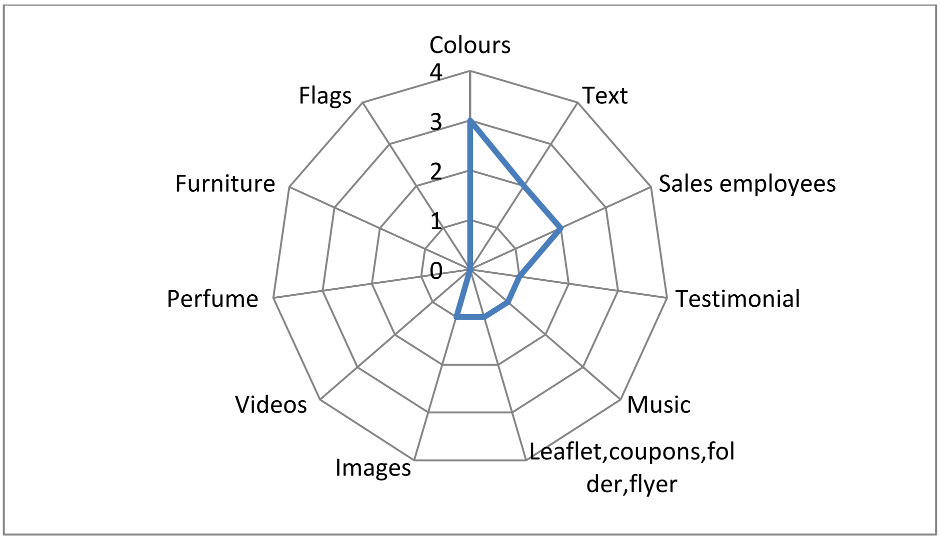

Table 6: Number of Italian Brands and space devoted to them

Brand - Retail Brand	PoS Typology	Number of Italian brands	Sales space devoted to Italian brands
Design Works	Multibrand	more than 10	…
Diesel Store	Monobrand	1	Total
Sartis	Multibrand	more than 10	Prevalent
Calzedonia	Monobrand	1	Total
Carrefour	Multibrand	more than 10	Complementary
Printemps	Multibrand	4-6	Complementary (in the furniture sector)

Table 7: Point of sale and Made in Italy positioning matrix

		Coherence level PoS and Made in Italy image		
		high	**medium**	**low**
Price positioning Made in Italy products	**high**	**Sartis Printemps**		**Design Works Diesel Store**
	medium		**Calzedonia Carrefour**	
	low			

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