Successful marketing by multinational firms to the bottom of the pyramid: connecting share of heart, global "umbrella brands", and responsible marketing

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Abstract

Purpose – This paper aims to contend that four significant ideas must be comprehended, and their connection and interaction understood if successful marketing to the 4 to 5 billion undeserved bottom of the pyramid (BOP) people in the world, by multinational firms is to be realized. These ideas are: the bottom of the pyramid (BOP) market itself; share of the heart versus consumer animosity; the nature and influence of global "umbrella" brands and responsible marketing as a guiding principle for all firms including those focusing on the BOP. Each of these ideas, in and of itself, represents an important dimension in today's global business environment, but taken together they offer a clearer understanding of how companies, particularly multinational companies, can do well (profit) and do good (improve humanity).

Design/methodology/approach – The paper briefly overviews the BOP literature, highlighting those parts most relevant to this work; expands upon the notion of "share of heart" and its twin components consumer affinity and consumer animosity; delineates the nature and impact of global "umbrella" brands in BOP marketing; synopsizes the notion of "responsible marketing" in the BOP context, and proposes a conceptual scheme of how these ideas are connected, how they interact in today's business world, and how they can lead to ongoing business success.

Findings – Mutlinational firms (MNFs) wishing to successfully pursue BOP markets need to blend their understanding of BOP uniqueness, with a clear understanding of the other three concepts, namely share of heart, gobal umbrella brands and responsible marketing. Tapping the potential of the BOP requires not only radicallly lowered priced products but also consumers with higher income. Marketers must address both parts of the problem since acting on either in isolation will not be effective.

Originality/value – Global umbrella brands of the rich world (BrandAmerica, EuroBrand, BrandNippon, etc.) must also play a part in successful BOP marketing. The future of such global umbrella brands lies to a great degree with BOP markets as these markets are still growing, and thus represent and will continue to represent either enormous partners or enormous rivals. MNFs that truly understand the nature, scope and potential of BOP markets, and act in concert to market responsibly to consumers in such markets, will not only garner the needed share of heart related to long-term success in such markets, but will see their own global umbrella brand continue to thrive and prosper in the ever evolving global market arena.

Keywords Multinational companies, International marketing, Globalization, Disadvantaged groups

Paper type Research paper

An executive summary for managers and executive readers can be found at the end of this issue.

Introduction

The literature to-date dealing with the bottom of the pyramid (BOP) has focused on the contributions that business can make to ameliorate the plight of the poorest of the poor. When Prahalad (2004) issued his call to engage marketers in one of the noblest applications of the profession, the idea was to do good, while doing well. He noted the problems that non-governmental organizations had in aiding those at the bottom of the pyramid and proposed a different model. Instead of charities operating to give to the poor, companies could adapt their products, promotion, distribution and prices to serve them. The poor would embrace those firms that served them best and fueled by subsequent profits such firms would sustain the process and gradually improve the BOP's standard of living. Prahalad offered many success stories of the potential profits available to innovative companies that provide the right products and services to this segment. By focusing attention on the BOP, Prahalad educated marketers about the needs, wants, and collective wealth of the very poor.

Prahalad's conceptualization relies on multinational firms to lead the effort to serve the BOP at a profit. The logic

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behind this rests on the nature of multinationals and their success as agents of competition and quality of life enhancement through brand building in the age of globalization. In short, globalization has intensified worldwide competition and in doing so has led to continuous product and service improvements as one successive wave of competitive innovation is followed by another. Arguably, one of the most important influences on marketing during the last several decades has been the continued success of globalized products and services.

When a firm extends its brand beyond its home market to other world markets, it must adapt to new conditions. Those conditions often include new sets of consumers with unique preferences, new competitors, new suppliers and new distribution channels. Likewise, such firms often face unfamiliar legal and political systems, different levels of technology use, and different customs, values and mores – and new ideas related to all of these. Those firm that succeed in these new markets, gain strength not only in terms of profit, but also in terms of knowledge, insights and understanding that greatly enhance their abilities to compete. Like steppingstones, successes in one country often lead to successes in others. With each successive step, firms and their brands that expand globally become better known, more accepted and more competitive and it becomes easier for them succeed in the next new market arena. In one sense, multinationals and their global brands are like top athletes. The process of competition makes them more competitive.

In a world containing multiple global brands, competing successfully means providing greater value to consumers and buyers than that offered by the competition. When firms truly have "global reach," they typically are continuously upgrading their knowledge of the arenas in which they compete and they are continuously leveraging such knowledge to create even greater value. Firms that embrace this "learning cycle" tend to flourish and prosper over the long-run. There are many examples of such firms (those with knowledge driven global brands) that span the spectrum of countries served and industries represented including IBM, Microsoft, GE, Nokia, Intel, Disney, McDonalds, Toyota, Samsung, Louis Vuitton, HSBC, Nescafe, UPS, IKEA, UBS, Siemens, AIG, Zara, HP, Reuters and so on. Each of these brands derives at least a third of its earning outside its home country, is recognizable outside its base of customers and has publically available marketing and financial data (see: www.interbrand.com/best_brands_2007).

As globalization has matured, countervailing forces have emerged. Globalization and the multinationals that ride its wave are viewed, in some parts of the world as invaders that compete unfairly with local options and local brands. Opponents argue that globalization ultimately leads not only to the destruction of cultural identities but also to the economic, political and social subjugation of underdeveloped nations to more dominate counterparts, particularly the United States, the European Union and Japan (Klein, 2001). More to the point, the triumph of giant companies over smaller ones means that power is more and more concentrated in undemocratic (no one elected them), globally branded multinational companies (Klein, 2007). To many who favor globalization, this growing animosity toward global brands and the firms they represent is a significant threat to global competition, global knowledge development, and global wealth creation. More specifically to this paper, those who speak counter to Pralahad's notions, represents a threat to the rise of those that are at the bottom of the pyramid, because those at the bottom, if convinced global multinational firms and their brands are correlated with their low economic status, cultural subjugation, and unfair resource exploitation will turn away from the benefits that such firms can bring.

This paper contends that four significant ideas must be comprehended, and their connection and interaction understood if successful marketing to the four to five billion undeserved BOP people in the world, by multinational firms is to be realized. These ideas are:

1. the bottom of the pyramid market itself;
2. share of the heart versus consumer animosity;
3. the nature and influence of global "umbrella" brands; and
4. responsible marketing as a guiding principle for all firms including those focusing on the BOP.

Each of these ideas, in and of itself, represents an important dimension in today's global business environment, but taken together they offer a clearer understanding of how companies, particularly multinational companies, can do well (profit) and do good (improve humanity). As such, this paper will:

- briefly overview the BOP literature, highlighting those parts most relevant to this work;
- expand upon the notion of "share of heart" and its twin components consumer affinity and consumer animosity;
- delineate the nature and impact of global "umbrella" brands in BOP marketing;
- synopsize the notion of "responsible marketing" in the BOP context; and
- proposal a conceptual scheme of how these ideas are connected, how they interact in today's business world, and how they can lead to ongoing business success.

We begin with a look at BOP markets.

Bottom of the pyramid

The bottom of the pyramid literature has created a high amount of interest. For marketers it combines the appeal of social action and profit. The tantalizing prospect of helping the poor while earning revenue speaks to the idealism within marketers. The ultimate prospect arising from marketing to the BOP is an increase in global prosperity with probable declines in conflict. The thought that inequities in income and opportunities fuel resentment and discord that leads to strife and war is a paradigm that has been present for centuries. Over time, researchers and practitioners have sought to implement bottom of the pyramid (BOP) concepts in a variety of settings. Some have born fruit; others have failed. As a result, the image of doing social good while doing well financially has become less cut and dried. As our understanding increases (and related literature matures), the opportunities and challenges of marketing to the BOP have become a clearer and more nuanced. Both market profile and market strategy must be carefully considered.

Today, while it is more and more accepted that the BOP marketing offers opportunities to create value for both the poor and for companies that engage this market, the early promises of a "fortune" seem to have been overstated (Karnani, 2007b). Two reasons for this are apparent including disagreement as to the real income of BOP consumers; and the shear size of the BOP market itself. The oft-quoted BOP figures of four billion people with per capita income below $1,500 per year or $4 per day (Prahalad and Hart, 2002), and four billion people with per capita income below $2,000 per year or $6 per day (Prahalad and Hammond, 2002), have been questioned by numerous researchers (Karnani, 2007a). These figures, and thus the scope of the BOP market were later cited by Prahalad (2004) as four billion people making less than $750 per year or $2 per day. Underpinning the uncertainty concerning the true nature of the BOP market, Karnani (2007b) reports that the World Bank estimated the actual size of the market to be 2.7 billion (as opposed to the oft cited four billion) and other respected sources characterized even the World Bank figure as an overestimation, with some estimating the poor at only 600 million (*The Economist*, 2004). In sum, differences ranging from earning of $2,000 per year to $750 per year and four billion in total to 600 million in total were large enough to give pause concerning the true nature and scope of the BOP potential. As our understanding of the basic profile of BOP markets has evolved, it is apparent that while this market is indeed potent, its potential contribution to any firm's profits needs to be tempered with a well grounded understanding of key demographics (income and size).

Concepts related to successful marketing strategies aimed at BOP segments around the world have also evolved. Like most markets, there is no "one size" fits all plan for companies engaging or contemplating engaging the BOP market. However, there are two elements of the BOP proposition that have been identified as highly correlated to successful marketing to individuals that fall within this market no matter where they are. First, an accurate characterization of BOP individuals both as consumers and as producers is required to fully understand their needs, perceptions, and behaviors. Indeed, more often than not, BOP individuals are producers and consumers of specific goods (food, clothing, shelter, etc.) and thus the typical separation of production and consumption, common among developed markets, is not readily apparent here. The need for firms marketing to the BOP to carefully cultivate perceptions of "partnership and cooperation" rather than "competitive-mercantile" perceptions is needed (see Rutherford, 2000; Martinez and Carbonell, 2007). Second, it is important to recognize that marketing to BOP individuals often requires a different business model than one typically found in advanced markets, one incorporating access to micro-credit as well as micro-finance, and the adaptation of the marketing mix that emphasizes function (specific utilities relevant to those of limited means) and identity (where products and services are also perceived as a means to a larger world of cherished values, and not just tied to physical or material wellbeing – see World Bank, 2002 – *Voices of the Poor*).

One enduring impression of the BOP poor is that they have few options and few opportunities to exercise options. Their economic status constrains them to pay a BOP penalty for items they purchase. They typically do not or cannot travel to locations that have better distribution infrastructure, lower prices or product or service alternatives. They are constrained and thus required to buy locally from the village monopolist who has all the market power. Given this historical and contemporary reality, the consumption experience more often than not leaves BOP people suspicious of business in general and feeling powerless to do much about it. Add to this, the typically lower educational level of BOP consumers, and their relatively limited awareness of the "outside" world and they, as a global consumer segment, have often been described as viewing global brands as suspicious outsiders to be shunned (Venkatagiri and Nair, 2005).

It is well known that success in BOP markets involves managing substantial challenges in technical and economic infrastructure, education, financial resources, and cultural differences. Related to this, are a number of questions that need to be addressed. Gardetti (2005) articulated them clearly. They include: How can companies transform their strategies aimed at developed markets into competitive advantage in BOP markets? What kind(s) of business model will work best? What messages resonate most with BOP individuals and how can they be used to build trust in this unique economy? What is our role in the educational and social development of BOP markets? The ultimate question multinational firms with global brands still remains – how can we do well, while also doing good in BOP markets?

Marketers now know that the pursuit of BOP profits is arduous and yields uncertain returns (Karnani, 2007a, b). However, a few clear examples can lend insights into the correlates of success and provide preliminary answers to the questions posed by Gardetti (2005).

Nestlé in India created a partnership with poor dairy farmers. Nestlé needed reliable sources of high quality milk. Farmers needed fairer compensation for their efforts. The current distribution channel aimed at keeping farmers at a disadvantage. Buyers paid low prices for milk and charged high prices for supplies. They sometimes bullied dissatisfied farmers and guarded market price information carefully.

To create a win-win situation, Nestlé engineered a parallel distribution system that corrected defects in the existing channel. It offered to pay for product at higher than currently available market rates. Adding value, it arranged to supply farmers with the supplies and materials needed to work at lower than market rates. The company also provided training that aided farmers in increasing their milk yields. The company started milk collection in Moga in 1961 in cooperation with 180 farmers. It has substantially expanded its operations with over 85,000 farmers in its own milk district. Nestlé uses local raw materials and develops local resources wherever possible. Nestle's corporate web site states:

> In Moga, Nestlé encouraged systematic development and injected resources into the system. It worked with the local community to gradually build confidence in the milk trade without compromising customs and sentiments.

Nestlé's actions did not stop there. They provided milking machines to the farmers with the largest dairy farms. Farmers were advised on good breeding and feeding practices, and on the health of dairy herds. Techniques for increasing milk yields at the farm were introduced. Nestlé has invested in chilling centers and farm cooling tanks. In addition to this, the company provides assistance to farmers in the areas of cattle feed, quality fodder seeds, veterinary medicines and mineral mixture and procurement of bank loans.

Nestlé also focuses on community development. It is helping with the construction of facilities for drinking water and lavatories in village schools in the Moga Factory Milk District. This is a joint effort with the schools, parent associations and village administrations. It acts as a true partner. In addition, it is concerned about local health and funds medicines for a tuberculosis clinic which is treating

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residents from Moga town and the nearby villages (www.nestle.in/mogasuccess.aspx).

A parallel innovation provided an additional benefit of immense value by empowering farmers with information. The Indian Space Resource Agency (ISRA) did so by providing computers for local villages, complete with a satellite based Internet connection and a solar power supply (Venkatagiri and Nair, 2005). This provided farmers with the opportunity to access daily market price information so that they could make informed choices about their selling prices.

Instead of just paying somewhat higher prices and charging somewhat lower prices, Nestlé created a partnership and a channel more like a cooperative channel than a traditional marketing channel. This is true responsible marketing. Getting farmers to agree to participate was not easy and not immediate. It took one or two pioneers to take advantage of the arrangement and convince others that it was realistic.

Examples like the one above reveal something about the BOP consumer. The dairy farmers were not easy to convince. As BOP members, they were at an economic and educational disadvantage. They were used to being treated in a manner best described as exploitation. Some did not know the range of opportunities that were possible. Others were risk averse and wary of anything new that might threaten the status quo, no matter how bleak it was. By using local agents, Amul overcame a fear of outside actors. By offering more than the competition and allowing the farmers to accept the new system voluntarily and at their own pace Amul gained acceptance and trust. Overall, Amul gained a measure of gratitude and a level of partnership. The conclusion is that the arrangement was win-win. Amul gained a stable source of supply at a reasonable cost; the farmers gained much more purchasing power and knowledge that further empowered them.

It is no surprise that the poor will respond favorably to products or programs, which increase their wealth as exemplified recently in Venezuela (Alvarez Herrera, 2008). As a nation, Venezuela accomplished a redistribution of wealth via social spending programs and government fiat. Its success was not unalloyed and was based in part on an uncommon national treasure, Venezuela's oil industry. One result was that the country's embattled leader, Hugo Chavez, has solidified his position because he gave them something of value (enhanced personal standard of living) and something to believe in (Venezuela as something larger than self and worthy of pride). Thus he earned the gratitude and allegiance of the poor. While other countries will find this feat difficult or impossible to emulate (Crawford, 2008), a major implication is that organizations (be they public or private) that aid the poor, and that are perceived to bring both functional utility and something with which to identify, gain their allegiance or affection.

Astute marketers know the value satisfying customers. When this is done correctly, profits result and companies gain lifelong friends and a "share of their hearts." Both results are very important to organizations. Making profits is of obvious importance and needs no amplification. However, winning share of heart can be even more important and deserves a brief overview.

Share of heart or consumer animosity

Marketers know the importance of emotion in consumer experience. While marketers pursue share of market and advertisers strive for share of mind, both have come to recognize the importance of achieving share of heart (Richins, 1997). Share of heart can be described as a series of positive emotional connections between an individual and an object. Share of heart in the business world denotes the affect relationship between a consumer and a particular brand, product or service provider. It occupies a position on a continuum some-where between share of mind and share of market; that is, it is predicated upon share of mind and usually manifests itself as a critical precursor to market share. Share of mind is cognitive, while market share is the result of behavior. In contrast, share of heart is based on enduring emotions that have been postulated to be a key ingredient to sustained competitiveness.

The understanding, correlates and measurement of share of heart is thus of considerable interest. However, share of heart, while defined in some depth (Day, 1989; Sisodia *et al.*, 2007) is still in its infancy with respect to correlates and measurement. It cannot be measured as easily as factors such as consumer response to marketing effort, market share changes, brand loyalty, and brand switching. These factors are behavioral measures that do not reveal share of heart. And while one might argue that share of heart correlates with share of market, market share is not a reliable measure of share of heart. Market share results from consumer purchases and there are three types of purchasers: non-buyer, new buyers and repeat buyers (Day, 1989). Repeat buyers may be the better indication of share of heart levels, since repetition may signal satisfaction, an emotion. Marketers have found it relatively easy to attract new buyers with functional appeals that are tied to incentives or deals. However, keeping new buyers is often a problem since short-term incentives typically do not create brand loyalty and long-term emotional bonds are tied typically to both a combination of functional, competitive value and identification with something of higher value (or the perception that the "exchange" at hand has a cause beyond immediate gratification). If deal-prone consumers comprise a substantial portion of a brand's market share, the brand is vulnerable to competition that either offers a better deal or one that "connects" with the consumer or both. Logically this connecting or achieving share of heart is essential for marketers wanting to become more firmly entrenched with their customers.

Brand loyalty is also not a reliable indicator of share of heart. Brand loyalty reflects behavioral consistency. It represents a series of repeat purchases. However, the reasons for the purchases may fall into two categories:

1. product commitment; and
2. product inertia.

Product commitment is closely related to share of heart because it contains an emotional element. However, product inertia is not. Measuring share of heart requires measuring the consumer's product commitment or the nature and strength of the emotional bonds to the product and brand. It also requires a deeper understanding of why a consumer made a particular purchase. Measuring share of heart requires exploring subjective feelings and identifying reasons for those feelings (Day, 1989). The term share of heart implies positive feelings but consumers can either like or hate a brand.

Share of heart may be viewed as a continuum ranging from consumer affinity, a generally positive set of feelings, to its opposite, consumer animosity, a generally negative set of feelings (Riefler and Diamantopoulos, 2007)

The share of heart literature supports the notion of competition based not solely on product or price, but the affective relationship of buyers towards sellers (Sisodia *et al.*, 2007). Share of heart applies to profit making companies (Apple corporations renown "coolness"), governmental institutions (FEMA's response to natural disasters in the US in New Orleans 2005 – perceived negatively and the Mid-West 2008 – perceived positively), or non-governmental, not-for profit organizations (the Red Cross and Christian Children's Fund). Individuals, be they ordinary citizens (firefighters) or rock stars (Bono of U2), can connect through the heart with millions. Politicians kiss numerous babies and pander to numerous special interest group in order to establish a positive emotional relationship with their constituencies. In many cases, share of heart, that emotional relationship that individuals or groups develop with an organization or brand or individual, is the most powerful factor in a person's decision to purchase a specific good or service, to support a politician or get behind a cause. Share of heart cannot only prompt action, it can serve as a powerful bond that resists competitive inroads (Nowak *et al.*, 2006).

Thus share of heart, consumer affinity, and consumer animosity can all be directed at a brand, a company or even larger entities such as a nation (the US, China, Japan) or a group of nations or region such as the European Union, Latin America, the Middle East (Oberecker *et al.*, 2008). Jaffe and Nebenzahl (2006) suggest, in reference to larger entities, individuals may consider specific nations with a positive or negative affinity, based on their perception (built on their direct and indirect experience) of those nation's companies and organizations, their citizen's lifestyle and wellbeing, the physical landscape and scenery of a country itself, its political and economic climate, its historical realities, it affiliation with higher causes and other attributes considered important. Notably, the literature shows that direct experience is the most powerful determinant of affinity or animosity.

Negative share of heart, negative affinity or consumer animosity may arise for many reasons and examples of such abound. These include:

- territory disputes (e.g. India and Pakistan both demanding the Kashmir region; Israel and the Palestinian Authority fighting for the area called either Israel or Palestine);
- economic arguments (e.g. the European Union's recent introduction of import limits for China-made clothing);
- diplomatic disagreements (e.g. France's and Germany's disagreement with the USA on the issue of the US intervention in Iraq); and
- religious conflicts (e.g. as recently experienced in the case of Arab countries' outrage against Denmark following the publication of Mohammed caricatures in a Danish newspaper).

Results from such animosity range from cool relations between countries, rejection by consumers of all products or services affiliated with a specific country or region, to armed conflicts and terrorism. While traditionally a political topic, practitioners have become more interested in the marketing effects of such animosity (Klein *et al.*, 1998; Klein and Ettenson, 1999; Klein *et al.*, 2004; Nijssen and Douglas, 2004).

One ground-breaking study used the Nanjing massacre by the Japanese in 1937 (in which 300,000 Chinese civilians died) as one of the events that caused Chinese consumers' enduring anger against Japan. Klein *et al.* (1998) verified empirically that animosity had a negative impact on Chinese consumers' willingness to buy Japanese products. Notably for marketers the negative feelings did not distort consumers' quality evaluations of the Japanese products. The results were sobering, as they imply that no matter how excellent a company's products or services are if the company is from a hated nation, effected consumers will refuse to buy.

For marketing practitioners, insights into the construct of consumer affinity, consumer animosity and the resulting share of heart towards nations or regions are valuable for several reasons. First, a direct relationship is apparent between affinity toward a nation (or region) and subsequent positive intentions to buy products and services "made in" that nation or region. And second, based on this reality, the importance of coordinated and concerted efforts aimed at inducing positive feelings towards one's nation or region is also apparent. Since personal experience (again both direct and indirect) is a major driver of consumer affinity, efforts at inducing positive feelings should focus on all "touch points" that together build collective affinity and thus share of heart towards a nation or region. Such touch points include all who visit host countries including professionals, tourists and students studying abroad, as well as all organizations that are more permanent representatives of their specific nation or region within a specific host country. The importance of building host country share of heart toward one's own nation or region cannot be overestimated. In the long run, the share of heart given by host country consumers towards the global "umbrella brand" of a given company paves the way to sustained success in such countries. This may be particularly true with respect to countries with significant BOP markets.

Global umbrella brands and BOP marketing

The construct "global umbrella brand" has its roots in the notion of "nation-brands" which have significance both at the macro (nation-state) and micro (citizen/consumer) levels. Consider that in today's global marketplace, the "true" brand-leader (that which commands the most attention from people around the world) is not a multinational company, nor an international trademark, nor a transnational logo. But rather it is a nation-state, which in the lexicon of marketing can be called BrandAmerica. And this brand, like all brands, is and will be shaped by the share of heart that it garners from citizens and consumers around the world. The level and degree of share of heart that it receives will either take it to new heights or relegate it to decline, decay and eventual replacement by another brand or brands that offer more value. More to the point of the present paper, the share of heart that any global umbrella brand receives from individual consumers around the world will directly influence the level of success that the firms associated with said umbrella brand realize. For example, companies associated with BrandAmerica (US firms that are perceived as being covered by the large umbrella of the nation state or region from which they originate) will find its level of success directly effected by the success or failure of this larger brand. This is particularly true for multinational companies, who affiliation with global umbrella brands is more readily apparent and is particularly true with BOP markets where inherent mistrust of outsiders is apparent and where low educational levels makes the association of a particular company and a particular umbrella brand easier to make.

BrandAmerica is but one global umbrella brand vying for the heart share of consumers in the global market arena. But this phenomenally successful symbol is the most known of all umbrella brands today and is the leading brand made by the American society. Among its domestic consumers (i.e. citizens of the US) and among many people of other nations, BrandAmerica's value proposition is quite strong and positive (although it does have its detractors and competitors which will be discussed later). This is because of its compelling benefits, including individual freedom and commercial opportunity leading to economic prosperity, and a sense that each of its users has at least some input into the nature and degree to which these benefits will be manifest in the brand (Rothkopf, 1997).

These benefits tend to be unambiguous to its heavy users and are closely linked to instructions in its "user manual" which include details on liberal democracy, free-market capitalism, rule of law, sound fiscal and monetary policies, transparency in business dealings, ethical and moral leadership, tolerance (if not outright embrace) of cultural and ethnic diversity, on so on (Friedman, 2000). Like any commercial brand, BrandAmerica's success has been contingent on its ability to continually outperform the competition (i.e. fascism, centrally planned economies, socialism, military dictatorships, croni-capitalism, tribal-based monarchies, religious fanaticism, and ethnic-focused alternatives), and upon reinventing itself when new challenges or new brands threaten its leadership position. Reinvention and change is critical to the survival of any entity that experiences a life cycle. Reinvention gives promise of an extended life cycle. And successful reinvention of any brand is critically tied to users having a say as to what alternative attributes will be represented by the brand. Indeed, much like successful changes in commercial products that are guided by environmental scanning, competitive analysis and consumer research, citizens of nations more readily accept national changes (e.g. new laws, regulations, policies concerning the balance between government and free-enterprise, new foreign policy initiatives) when they have a voice in such changes (through sanctioned elections and representative government). Again, because of these factors BrandAmerica has sustained the loyalty of its heavy users.

The challenge for BrandAmerica (or any global umbrella brand) today is with its light users, its potential users and its "never in my land" rejecters. While certain nations and their citizens have accepted some of BrandAmerica's manifestations or propositions (again, individual rights, entrepreneurial opportunity, business transparency, popular election of leaders), many have rejected others (including a conservative social-welfare net, limited regulation of multinational and other corporations, non-support of global environmental treaties, and military actions against rogue regimes). In marketing terms, many light or potential users of BrandAmerica perceive its value proposition as not being closely correlated with their wants and needs. And thus the challenge. For like all commercial products and services, while BrandAmerica's heavy user base (i.e. the American people), give it life, it will be its ability to attract new users (foreign nationals) that will maintain its vitality and by association that of its "covered" companies, organizations and institutions.

BrandAmerica represents an alternative whose competition includes other significant "nation-brands", "region brands" and other identifiable ethnic, religious and tribal brands (some would say private labels). Each of these offers distinct attributes and related benefits not only for their respective citizens (heavy users) but also to other citizens of other nations searching for better alternatives (light and potential users). Just like the multifaceted alternatives in the detergent aisle, these nation-brands compete for the hearts, minds and votes (both dollar and political) of their current and potential consumers. And, consistent with generally accepted marketing theory, the nation-brand with the largest set of loyal users (the "brand leader") is usually the most powerful and most capable of exerting considerable leverage over weaker competitors. On the flip side, those that fail to garner loyal users are, in time, replaced. Indeed, the Roman, Ottoman, British and other brand leaders of the past were all replaced in this manner.

BrandAmerica is by no means the first nation-brand with broad appeal. But it has served as the catalyst for the most recent globalization process. The introduction and subsequent growth of the BrandAmerica model was precipitated by the convergence of interrelated political, social, economic and technological factors, both internal and external to its birth. Internally, America's embrace of liberal democracy, with limited government intervention, spawned the development of a flourishing, prosperous free-market capitalist system and led to the many successes of its shaded companies that ply world markets (Proctor and Gamble, Wall Mart, GM, Microsoft, etc.). The success of this system was further enhanced by social mores that adopted tolerance of diversity, while shunning the aristocratic and oligarchic tendencies of other societies (e.g. Europe, Russia and China to name but a few).

Clearly, belief in this model has spread as recent reports indicate that 118 of the world's 193 nations are democratic, encompassing a majority, 54.8 percent, of its people. Indeed, acceptance externally grew rapidly following BrandAmerica's triumph over fascism in the Second World War and the failure of the British imperialism to regain its leadership on the world stage. This growth has bestowed untold benefits on the private and public organizations that bask under it shadow and are affiliated with its promise and appeal.

More recently, the appeal of BrandAmerica has benefited from the spread of modern information technology, and the resultant speed at which its value proposition has been transmitted to all corners of the earth. Similarly, financial democratization (the rise of multiple stock markets, junk bonds, mortgage securitization, and other sources of funding) and information democratization (the rise of global telecommunications and the internet) on a world-wide scale has exposed "light and potential users" around the world to the essence of BrandAmerica's value proposition (see – Halal *et al.*, 1997, Friedman, 2000). Again, the positive benefits from all this for its affiliated "under the umbrella" organizations have been significant.

As with any brand, challenges exist. At issue is whether or not BrandAmerica will remain the dominant option in the future. Or will brand switching occur causing BrandAmerica's life-cycle to eventually reach maturity, decline and death? Or will it continue to shine, sustaining its heavy users, while further attracting light and non-users? A brief look at the past is useful here.

The Roman Empire, the Ottoman Empire, the Napoleonic French Republic, and the German Third Reich were all nation-brands or global umbrella brands in their time. Each promised a variety of economic, political and social benefits including expanded trade, participative government (at least for some) and shared cultural values. Beyond initial conversion, however, these nation-brands failed to develop deep-rooted loyalty from their users. Each in turn eventually fell to nation-brands offering a more compelling portfolio of benefits to their respective followers.

Relative to BrandAmerica, these other nation-brands were either physically imposed through military conquest on large portions of their constituents, or the constituents were politically or economically coerced unwillingly into the relationship. Neither alternative reflected the freely given embrace, the share of heart necessary for any brand's long-term success. The empire-oriented nation-brands arguably delivered real benefits to some of their subjects but the majority opted for other choices when more compelling alternatives presented themselves. Even today, Friedman (2000) notes that such changes typically come not from the top (where power lies), but from the bottom (where the oppressed and powerless lie), and from the outside (where new users lie). When such brand switching occurs at the macro – global umbrella brand level, it occurs also at micro brand level where affiliate organization lie. A tarnished global umbrella brand, leads to tarnished company brands.

Early in the twentieth century BrandAmerica was a relatively obscure nation-brand that lacked a compelling proposition. The dominant nation-brand was Great Britain or "BrandBritannia" that controlled roughly twenty-five percent of the global landmass. Following the conclusion of the Second World War, however, it was clear that the British Empire had reached the end of its brand lifecycle. Although a nominal democracy, an often-brutal imperialist past, and a caste-oriented aristocracy – that continues to inhibit twenty-first century social mobility – tarnished its image. From peoples recently liberated from Axis tyranny to undeveloped, colonized peoples with aspirations for national sovereignty, BrandBritannia was no longer an acceptable nation-brand alternative. During this period, BrandAmerica, which unabashedly demonstrated its economic and military superiority, surpassed BrandBritannia as the nation-brand of choice. But soon another nation-brand emerged and it offered a distinct value proposition that would soon challenge BrandAmerica.

The Union of Soviet Socialist Republics attempted to exploit a perceived weakness in the BrandAmerica proposition. It promised similar results – high living standards – but the usage process contained none of the capitalist side affects (e.g. class superiority, poverty, inequality, etc.). To nations already distrustful of BrandBritannia, and other imperialist European nation-brands, the USSR ("BrandRed") proved to be a very enticing alternative to BrandAmerica, the new improved capitalist icon. To its detriment, BrandRed frequently extended its brand leverage via military conquest and repressive political regimes. Nevertheless, BrandRed enjoyed strong trial and high initial loyalty given its ability to quickly lift the standards of living among destitute populations. But, BrandRed failed to deliver on its core promise – sustained growth in living standards. Misleading loyal consumers with false promises soon became an art. Also, a class structure emerged, in a purportedly classless society, where party bureaucrats "were more equal than others." The falsity of RedBrand's message disenfranchised the heavy users and disillusioned the light and potential users. As a result the global thought-leader became BrandAmerica. Ultimately capitalism triumphed over communism and BrandAmerica emerged as the undisputed nation-brand of choice. Today, BrandRed has ceased to be a viable competitor in the nation-brand competitive arena, but it is still employed in isolated hard-line markets such as Cuba and North Korea – where the individuals at the BOP are either partially or severely restricted from exercising their choices.

Today, many believe BrandAmerica is top-of-mind, share of heart leader among the world's peoples and garners a near monopolistic market position. However, monopolies are prone to complacency as they more than often ignore the wants, needs and complaints of their light consumers, potential consumers or "never in my land" consumers. BrandAmerica is no exception and has been challenged repeatedly by competitive nation-brands and rising global umbrella brands claiming to offer greater benefits (i.e. high living or spiritual standards), at lower prices (i.e. without the capitalist social ills, or perceived cultural degradation that BrandAmerica might bring). As in the consumer products' area, this dissonance opens the door to competitors. As with organizational brands, consumers will seek out global umbrella brands, which deliver optimal performance and value for a given price.

Japan ("BrandNippon") challenged BrandAmerica in the 1980s with a proposition that promised high living standards by integrating government policy making with corporate business decisions (Sakakibara, 1993; Woo-Cumings, 1999). Initially successful, BrandNippon's appeal faltered due to its inability to sustain continued economic growth (Posen and Mikitani, 2000).

In Europe, formerly imperialist-oriented nations, who have languished beneath BrandAmerica for decades, have merged under a "EuroBrand" umbrella to compete more effectively (De Grauwe, 2000; Nelson and Stubb, 1998). Since inception, the EuroBrand has been remarkably successful as it leverages economies of scale and scope. Recent observations, and experience suggests that this relatively new brand may encounter difficulties, as it tries to satisfy the needs of its heavy users (Western Europeans) and seeks to attract new users (Eastern European, transitional economies of the former Soviet bloc and former colonial subjects), while also extending to latent users (particularly BOP users just now being considered attractive). The problem lays with the fact that most of the new users do not share the tradition of democratic values nor the economic, primarily capitalistic culture of the core EuroBrand consumers. Other observers suggest it will be the fact that EuroBrand lacks a clear identity as it strives to be "all things to all people" which leads to its ultimate demise (Meeusen *et al.*, 2002; Gauron *et al.*, 1999). Consumer dissatisfaction is already apparent as bickering states within the union demand more than the brand can offer (Rosa and Secara, 1999).

Interestingly, BrandRed is attempting to reposition itself with mixed success under the auspices of new owners. A good example of this is the People's Republic of China, which is attempting to meld the positive benefits of BrandAmerica with the defunct BrandRed to create a hybrid state capitalism oriented alternative. The "new and improved" BrandRed has displayed impressive results to date, but akin to the classic BrandRed it is maintained by forced acceptance and may well succumb to classic anti-monopolistic forces, or be forced to evolve and change in a more open alternative (Glassman, 1991; Santoro, 2000).

Finally consider one other contestant in today's global arena. Osama bin Laden and others are pursuing the development of a radical new brand – "RadBrandIslam." It is niche oriented, based more on religious/Islamic fundamentalism and tribal loyalties. It still has relatively little mass-market appeal but none-the-less threatens the very existence of the market leader, BrandAmerica (Booth and Dunne, 2002; Ali, 2001). Followers of RadBrandIslam have no interest in the benefits provided by BrandAmerica (or any other alternative), subscribing instead to an entirely different value system, based on fatalistic notions (versus deterministic ones) and identifying more with eternal harmony rather than internal harmony (Rubin and Rubin, 2002; Tibi, 2001; Sharansky, 2008). This brand represents perhaps the biggest challenge to BrandAmerica and the current globalized capitalistic/democratic-leaning system that prevails in the world today. And in order to remain the competitive leader among alternative such as RadBrandIslam, BrandAmerica must reassess its offerings and how they are communicated, packaged and positioned in certain markets and nation-states.

To continue and enhance the relevancy of BrandAmerica, its proponents must be cognizant of the potentially harmful side effects from its improper usage. Just as pharmaceutical companies are required by law to disclose harmful side effects in their advertising, and alcoholic beverage companies must clearly indicate the dangers of drinking and driving, and encourage users to drink responsibly, proponents of BrandAmerica must be up-front in making clear that usage might lead to the some loss of cultural identity, that followers may be required to subordinate their national economic interests to global interests. But they must also communicate effectively that the benefits far outweigh the costs of doing so. In the end, however, it will be the citizen – decision makers who will ultimately decide the fate of BrandAmerica, and by association its covered organizational brands, not its the proponents, nor opponents.

Can other nation-brands develop powerful propositions that capitalize on the positive equities of BrandAmerica and leverage them into new offerings? Can the BrandNippon be repositioned? Is the Chinese experiment a potential niche alternative for citizenry with a history of strong central leadership? What about the EuroBrand? Can it survive beyond its continental base? Or, can an Islamic-oriented nation-brand be developed that is not in direct conflict with BrandAmerica yet also delivers the same end-benefits? Or is it possible that BrandAmerica will lose its leadership position resulting in a subsequent fragmentation of nations into endless varieties of "private label" entries with woefully indistinct benefit?

Share of heart can be immensely valuable in the face of local opposition to global brands. Local opposition, often spurred by local competitors can lead to consumer animosity toward a brand or a nation brand.

Brands play a critical role in establishing a firm's visibility and position in international markets. Building coherent international brand architecture is a key component of the firm's overall international marketing strategy, because it provides a structure to leverage strong brands into other markets and integrate strategy across markets (Economist, 2004). As alluded to above, globalization has changed the nature, characteristics, and definition of a brand. Globalization and its ability to break down barriers and walls, has transformed the world, in many respects into a "global village" and where individuals are "citizens of the world" (Moffatt, 2008). Brands are no longer a local entity but a global reality. Globalization is now analogous to a fundamental doctrine in marketing – namely – the influence and power of a 'brand'. The brand in turn is a global brand- a brand that has worldwide recognition; a brand that represents products and services, which have value for people all around the world.

Currently, certain brands suffer from low share of heart. In some countries, global brands, perceived to be "outsider" brands, engender negative feelings that can rise to the level of animosity (examples include the American quick service giants McDonalds and KFC, the French retailer Carrefour, and the Japanese auto industry in general). When a significant number of consumers feel animosity toward a brand or a country's products, success may be impossible. One solution may be to proactively address the issue in a grassroots fashion. Instead of the top of the pyramid (TOP) approach favored by many (if not most) global brands, attempting to serve the BOP may position them as local players. They may capture enough share of heart to insulate them from consumer animosity.

Responsible marketing

The essence of this paper is to understand better how multinational firms, shadowed by global umbrella brands can develop a positive image resulting in significant share of heart when targeting the markets at the bottom of the pyramid. The last piece in this puzzle is the notion of responsible marketing.

Responsible marketing is the term given to socially conscious marketing, a focus that examines the negative effects of marketing efforts on society and attempts to ameliorate those effects. The current obesity epidemic in the US serves as a good example of the negative effects of marketing. Marketing fast food, prepared food, and food containing high levels of fat, sugar, or high fructose corn syrup, is blamed for increasing obesity rates. When fast food companies compete by increasing the size of their drinks and French fries, called super sizing, they provide a larger number of calories for a fixed price. However, calories alone do not account for the problem.

The Federal Trade Commission declared obesity as a serious epidemic and issued subpoenas to 44 food and beverage companies for a report it is preparing for congress on marketing to children. Marketing to children is only one such issue under examination. According to Adonis E. Hoffman, Senior VP and the counsel of the American Association of Advertising Agencies in Washington, and Director of American Business leadership institute's center on responsible media and marketing, marketing has become a scapegoat for the substantive ills of the society. Hoffman believes that the ensuing public policy fiction is that society's

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wrongs can be fixed by ceasing all marketing and advertisement. Responsible marketing is a powerful mechanism to deal with such allegations and beliefs, which might be false. In order to prevent marketing from becoming the scapegoat for the wrongs of society, marketers need to adopt a responsible approach; an approach, which is beneficial not only at the micro level (consumers/producers) but at the societal level as well (sustainability, environment etc.). The idea of responsible marketing holds that organizations determine the needs, wants and interests of target markets and then strive to deliver superior value to customers in a way that maintains or improves the customers or society's well being (Kotler and Armstrong, 2003).

For many years community development goals were philanthropic activities that were seen as separate from business objectives; not fundamental to them. Doing well and doing good were seen as separate pursuits (Marconi, 2002). The trend has changed. Many organizations now aim at offering the right benefits and providing superior value for goods and services to the customers and enhancing the local, regional, national and international communities in which they exist.

Brand image is of paramount importance in any market segment. Perceptions define a brand's image and can be accurate or inaccurate. In turn, image can determine a brand's success. Responsible marketing means marketing with a conscience which in turn means providing ease of choice, ease of use, ease of mind and ease of heart for all that are "touched" by one's firms and its offerings.

Responsible marketing is one technique that may overcome some accurate negative feelings toward a brand, a company, or a nation. Not all global brands have been marketed with sensitivity to host country customs and sensitivities. Some, like McDonald's in India, have reinvented their product lines in recognitions of local conditions. The Hindu prohibition toward eating beef would have doomed a product line featuring Big Macs and hamburgers. However, changing to more appropriate products can be viewed simply as an ordinary marketing response to customer needs. A truly responsible marketing approach would consider a company's impact on the environment, society, and even other competitors (all who are "touched"). Even paying workers a higher wage might raise the inflation rate and pressure local employers to pay more or face losing their best workers. The likely result would be negative feelings about the multinational interloper.

Multinational firms wishing to successfully pursue BOP markets need to blend their understanding of BOP uniqueness, with a clear understanding of the other three concepts discussed above, namely share of heart, global umbrella brands and responsible marketing. More importantly, they such firms need to grasp the connection and interaction between all of these.

Understanding the connections and interactions of share of heart, global umbrella brands, responsible marketing and successful marketing to the bottom of the pyramid

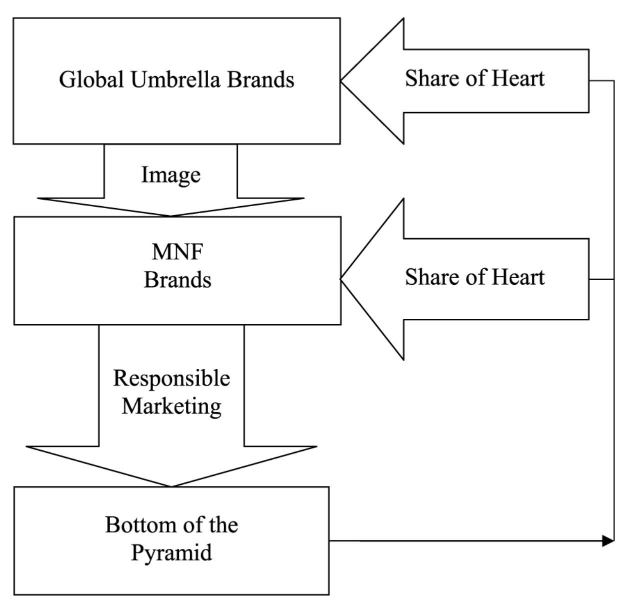
The relationship between share of heart, global umbrella brands, responsible marketing and successful marketing by multinational firms (MNFs) to the BOP can be understood in the form of a continuous cycle (see Figure 1). By clearly perceiving the size and nature of BOP markets, and their unique historical and contemporary realities (low education levels, suspicion of outsiders, exploitation by local monopolists, yet desire for value adding products and partnerships that empower and offer higher meaning in poor individual's lives) the need for a responsible marketing approach also becomes clear. MNFs that market responsibly to the BOP market (through cooperative engagement, partnership building, empowerment and trust) garner enhanced share of heart among BOP consumers, which it turn enhances the MNF's brands. If these actions are accompanied by positive perceptions of the global umbrella brand that covers the MNF, then BOP share of heart is further garnered and the overall image of the MNF brand is yet again enhanced. A cycle of positive perceptions, based on an astute cycle of learning (that connects the concepts depicted in Figure 1) leads ultimately to the much wanted, yet at times illusive "doing well and doing good."

The process also applies to marketing at the top of the pyramid but is not as urgent as TOP consumers are likely to already harbor a certain level of affinity for MNF brands. In contrast, apply the process (again Figure 1) and winning hearts at the BOP builds affinity among a most suspicious consumer segment that is vulnerable to anti-global feeling and manipulations that have been the demise of many MNF operations in poorer markets. In the end, a continuous and concerted effort on the part of MNFs to understand and apply the insights underpinning the process (connections and interactions) can act as the force that drive the blades of the turbine of future growth and long-term success in BOP markets.

Conclusions and implications for marketers

Prahalad has argued that the BOP represents an important marketing opportunity for multinational companies and that those companies should not overlook the long-term opportunity that it represents for profit and global

Figure 1 Enhancing share of heart



improvements. He also emphasizes that because the BOP market is so unique it must be approached with a different mindset than one might bring to other markets. One example of such is Nirma detergent made in India, which highlights this fact. A single entrepreneur created Nirma to compete with Hindustan Lever's market leading detergent, Surf. Surf gained market share because it is an excellent product. It has numerous additives that make it effective yet gentle to humans. However, its cost was significant. In fact, Nirma does not contain many of the ingredients and safeguards of its rival. It works but can cause blisters on the skin. Despite its harshness, the poor embraced it because they could afford it, they trusted it, and they were suspicious of an outsider's higher priced alternative. The implication is that "research must also seek to adapt foreign solutions to local needs, but they must also overcome mistrust and suspicions" (Prahalad and Hart, 2002). Tapping the potential of the BOP requires not only radically lower priced products but also consumers with higher income. Marketers must address both parts of the problem since acting on either in isolation will not be effective.

Arguably, a more important outcome of success marketing to the BOP is the positive feelings it can yield. If MNF efforts result in positive social action outcomes, the accompanying goodwill may be so valuable that it outweighs any slim profits that may be expected over the short term. Well informed and executed efforts aimed at the BOP can grow a poor market into a middle-class, if not rich, market that has enormous long-term potential. MNFs that get it right now may reap future benefits that will swamp those initially realized.

Global umbrella brands of the rich world (BrandAmerica, EuroBrand, BrandNippon, etc.) must also play a part in success BOP marketing. The future of such global umbrella brands lies to a great degree with BOP markets as these markets are still growing, and thus represent and will continue to represent either enormous partners or enormous rivals. MNFs that truly understand the nature, scope and potential of BOP markets, and act in concert to market responsibly to consumers in such markets, will not only garner the needed share of heart related to long-term success in such markets, but will see their own global umbrella brand continue to thrive and prosper in the ever evolving global market arena.

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