

Branding in China – An Institutional and Consumer Perspective

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Abstract

The aim of this paper is to investigate the Chinese branding landscape. First, the strongest Chinese brands are analysed. This analysis offers explanations for typical Chinese brand strategy and establishes current trends in Chinese brand management practice from a corporate perspective. The research includes an empirical study on the motivations of Chinese consumers investigating their preferences of Chinese- over foreign brands. While the discipline of brand management has a relatively short tradition in Chinese boardrooms, the outcomes of Chinese consumer preferences towards their favorite brands are both revealing and unexpected. The paper will conclude with the formulation of four Chinese branding trends that are likely to shape the Chinese branding landscape in the future.

Keywords: Branding, China, Marketing Strategy Consumer Behaviour.

JEL classification: M30.

1. Introduction

The label “Made in China” is foremost associated with cheaply and mass produced goods. This is particularly perceived by consumers in Western markets that have traditionally profited from affordable but generally low quality products made in the Middle Kingdom. Chinese consumers themselves evince less faith in domestic products, often preferring non-Chinese brands. To overcome such negative perceptions of ‘brand China’ in both domestic and international markets, Chinese companies are obliged to counter these perceptions, primarily by improving product quality (Backelar, 2014). However, the disciplines of “marketing” and “branding” are not yet as entrenched in Chinese boardrooms as they are in their Western counterparts. Brands, brand management practice, and consumer preferences in China differ significantly from more “brand mature” markets such as Europe, the USA, or Japan. To this day, China is seen as a mass consumer market, resulting in a marked paucity of studies of that market from a branding perspective. There are, for instance, no studies that analyses brands and brand management from a consumer perspective, identifying those sectors in which Chinese brands trump the foreign competition and those in which they do not. To understand why Chinese brands are the way they are, what consumers value, and how this plays out would profit Chinese and foreign companies alike.

This paper will first examine the current Chinese branding landscape. It will further describe and explain typical local brand management practice that has shaped Chinese brands over time. The corporate view will be supplemented by a consumer perspective with an investigation into preferences among foreign and Chinese brands. Finally, four Chinese branding trends will be identified and explored to further the discussion of the branding future in the second largest economy in the world.

2. The Chinese Branding Landscape

Few Chinese brands yet play a prominent role on the global stage. Only two Chinese brands make the most recent Interbrand Best Global Brand list. PC-manufacturer Lenovo is a new entrant, ranked at 100, and Huawei, mainly known for its smart phone branch, sits at number 88 (Interbrand, 2015). Overall, the Interbrand ranking is dominated by American brands (56%)

followed by European marks (35%). Brands from the Asia-Pacific region claim only 11% of the top 100 places on the list (ibid). Interbrand also investigates regional markets and composes brand rankings at a national level. In the Interbrand ‘2014 Best China Brands’ report, the internet services giant ‘Tencent’ claimed the number one spot in the top 50, ranking just above China Mobile (Interbrand, 2014). One striking feature of the Interbrand Chinese brand ranking is that 13 out of the top 20 are companies from the financial services sector. In comparison, the entire Best Global Brands 100 only contains 12 brands from the financial services sector (Interbrand, 2015). The strong representation of financial services brands in China is confirmed in the more recent ‘BrandZ™ Top 100 Most Valuable Chinese Brands 2016’ ranking, where seven brands from this sector make it into the top 20 (Millward-Brown, 2016). However, the relatively large representation in China with brands from the financial sector is coming under pressure. Shrinking brand values and lower brand value growth of finance brands is currently under way (Interbrand 2014).

Next to the atypical overrepresentation of financial services brands, the Chinese branding landscape offers abundant ground for brands from the technology and e-commerce categories. The combined brand value of Tencent (# 1), Alibaba Group (# 3), and Baidu (# 5) makes up over 30% of the entire brand value of all brands in the BrandZ top 100 brand ranking (Brown, 2016).

Other notable brands in the top 50 BrandZ ranking are Huawei (# 7), Lenovo (# 24), and Haier (# 35). All three brands are very successful locally and have also gained a global presence. Huawei, which has often been coined the ‘iPhone killer’ currently holds third place in global smartphone sales, trailing only Samsung and Apple (Glenday, 2016, IDC, 2016). Lenovo, which also manufactures smartphones, has become a worldwide household name for PCs and is the world market leader ahead of Hewlett Packard, Dell, and Apple (Huang and Mainelli, 2016). Lenovo CEO Yang Yuanqing has declared branding a key management priority in the company’s quest to become and remain a leader in its industry (Kirkland and Orr, 2013). It will be shown in chapter 3, that top management support of branding issues is not the norm in Chinese boardrooms. A focus on brand building has put Haier into a leading position in the home appliances market, both domestically and globally. Like Lenovo, the company puts a high emphasis on the brand and has recently purchased GE Appliances in the US, which marks another major take-over by a Chinese investor (Chang, 2016).

As mentioned above, technology brands take up prominent places in domestic brand rankings. Nonetheless, the success of some of these brands has also been a result of the protectionist policies of the Chinese government towards foreign online companies such as search engines or social media services. For instance, Baidu, the Chinese market-leading search engine is a NASDAQ-listed company and operates like its American counterpart Google, offering many other services such as online travel booking (Qunar), video streaming services, and a smartphone operating system (Baidu Yi) (IT-Times, 2014).

The Alibaba e-commerce platform has become a world-famous brand despite its main focus on the Chinese market. This is partly a result of the well-publicised stock market IPO in 2014 and the charisma of the company’s founder Jack Ma. Like some American role models, Ma has reached cult-status, due to his recognition of the importance of putting himself forward as the brand’s key ambassador and the industry’s thought-leader. In the most recent fiscal year ending in March 2016, the Alibaba Group counted for over 420 million active buyers with total cumulative revenues of 101.14 billion RMB (Statista, 2016a). This is equal to 14.085 billion EUR. Alibaba manages several online e-commerce platforms such as TMALL.COM, Taobao.com, all strong brands in China on their own (Alibaba, 2016b). Alipay is the company’s e-wallet payment system and handles over 70% of all Chinese online payment transactions. This makes it the world’s largest online payment processor (Osawa et al., 2014). Alibaba Group

has further diversified into entertainment (Alibaba Pictures), online video (Youlu Tudou), and is also a local market leader in cloud computing (AliCloud) (Alibaba, 2016b, Statista, 2016a). Alibaba is publicly traded at the NYSE and its stock majority is owned by Japan's Softbank and America's Yahoo (Zucchi, 2014) (See also chapter 3 on Alibaba's brand architecture). China's most valuable brand is Tencent, itself another digital giant with a calculated brand value of US\$ 82.107 billion (Millward-Brown, 2016). In comparison, Microsoft is valued at US\$121.824 billion and Intel at a mere US\$18.632 billion (Millward-Brown, 2016b). However, these US tech brands boast global reach and customer bases, whereas Tencent is mostly confined to the Chinese domestic market. The company is also diversified into several online markets, such as instant messaging, social media and online gaming. It also holds a 20% stake in JD.Com (online retailer ranked #15 in the BrandZ Top 100 most valuable Chinese brands 2016). A notable brand in Tencent's product portfolio is WeChat, the very popular Chinese social media app comparable to the WhatsApp instant messaging service owned by Facebook. WeChat had 762 million active users in Q1 2016 (WhatsApp 1 billion at the same time) (Statista, 2016b, Statista, 2016c). WeChat offers far more commercial possibilities than WhatsApp, which mainly focuses on instant messaging. With WeChat, users can pay restaurant bills, play games, and participate in online promotions (Tencent, 2016), by way of a tool that allows brands to target niche users who are likely to shop (Abkowitz, 2016).

The great advantage that digital brands in China possess is the extremely large proportion of the population with access to the internet. At the end of 2015, over 680 million Chinese had online capabilities (Huang, 2016). In 2016, it is expected that over 618 million users will access the internet via their smartphone alone (eMarketer, 2016). This offers great potential for any digital service that can be used on the go. Chinese consumers have embraced digital technologies with particular enthusiasm, making for exponential change and a landscape of ongoing disruption, as evinced by Alipay's mobile payment service and Didi's taxi service (Millward-Brown, 2016, p. 97).

Overall, certain industries are underrepresented in the Chinese branding landscape. For example, automobile brands are rare and their value is relatively low. Interbrand only ranks one brand in their national top 50; Great Wall Motor at #43 (brand value of US\$ 499 million) (Interbrand 2014). BrandZ Top 100 ranking already lists three car companies, namely BYD (#46, US\$ 1.573), Great Wall Motor (#61, US\$ 767 million), and Changan (#99, US\$ 245) (Millward-Brown, 2016). Emerging Chinese car brands indicate a growing influence on a domestic market still dominated by foreign automobile brands.

Half of the BrandZ Top 20 is made up of private enterprise companies and half of state-owned enterprises (SOEs) (ibid). Although the majority of revenue for these top 20 brands is mainly gained from domestic sales, some brands are truly international. Lenovo, for example, generates nearly 70% of revenue outside its home base, followed by Huawei (62%), ZTE (50%), and TCL (41%). Some brand heavyweights clearly still focus on the domestic market, with Haier at 12 % foreign sales, Alibaba Group 9%, and the brand value leader Tencent only generating 8% of sales abroad (ibid). To improve the image of the 'Brand China' abroad, the Chinese government initiated the "Go Global" policy in 2000 (Wu et al., 2011). With this initiative, up to 50 Chinese firms were intended to become "globally competitive" companies (Keller et al., 2012). The significance of branding in this context was underlined in 2011 by China's Commerce Minister Chen Deming, who informed the Chinese parliament that the government would "encourage the best firms to acquire or build up overseas operations and to license or acquire famous global brands in order to obtain international recognition and improve the image and competitiveness of Chinese products" (Backaler, 2012).

In summary, the Chinese branding landscape has characteristics that differentiate it from other markets. Although brick and mortar companies with brands in the banking, insurance, and retail

sector are still prevalent, most growth and value is contributed by technology brands and services in the digital sector. Brand growth in China has been driven mainly by the domestic market but Chinese companies may have to look beyond their own borders to compensate for the decelerating home economy.

3. Brand Management in China

Brand management is defined as the design and implementation of marketing programs and activities to build, manage, and measure brand equity (Keller, 2008, p. 38). An important aspect when building brands is the role and visibility of the corporate brand (Kapferer, 2008, pp. 351). Brand architecture is concerned with the way the corporate brand is used for the offerings and whether or not different brand names are used. The extant literature mentions two types of brand architecture: (1) the corporate brand dominant strategy “branded house” and (2) the individual brand dominated strategy “house of brands”. A branded house architecture uses one master brand, typically the corporate brand, to give consistency to all offerings (Rajagopal and Sanchez, 2004). The “house of brands” strategy on the other hand is characterized by independent and unconnected brands without a link to the corporate brand (Aaker, 2004, p. 48). In many Asian markets, including China, the branded house strategy is predominant (Kapferer, 2012, p. 323). This strategy has two advantages. First of all, the corporate name can be placed on many disparate products. Secondly, in Asia, “the more powerful a group, the more it is respected” (ibid, p. 324). Putting the corporate name on everything makes the corporation more powerful and respected (ibid). Huawei for example, to most Western consumers known for its mobile phone products, applies the corporate name for all of its services and products as diverse as cloud computing, network solutions, consumer electronics, and IT security (Huawei, 2016). Other notable Chinese brands such as Lenovo, Haier, and Hisense also apply the branded house brand strategy. Although some of Alibaba’s main business units do not bear its name, such as Taobao and Tmall, many of the group’s brands have an obvious brand name connection with its parent company, e.g. ‘Alipay’ (mobile payment), ‘Aliexpress’ (global ecommerce platform), ‘Alimama’ (marketing technology), ‘Aliyun’ (cloud services), and even its own news channel ‘Alizila’ which is dedicated to broadcast news about the Alibaba group (Alibaba, 2016b). All of these Alibaba subsidiary brand names begin with the significant ‘Ali’. Figure 1 shows how Alibaba visualises its corporate brand name in its brand logos.



Figure 1. Selected Alibaba Group brands with corporate brand affiliation Favorite Brands

Source Alibaba, 2016a

The use of corporate name dominated brand architectures is expected to continue in China. The same development is still prevalent in other Asian markets such as South Korea and Japan, where companies like Samsung in South Korea and Mitsubishi in Japan spread the corporate name across the board. The cultural dimension of ‘bigger is better’ will therefore likely

continue to impact the branding culture in China.

4. Chinese Brand Management Culture

The ruling form of corporate brand endorsement in China and many other Asian markets is in stark contrast with the idea of brand differentiation which dominates in Western markets. The FMCG maker Procter & Gamble led the way in insisting on a strategy whereby a brand has to stick to one product and offering (Kapferer, 2012). Even the job description of “brand manager” is known for being coined in the 1930s by Procter & Gamble (Hehman, 1984). The lack of focus on brand differentiation in China and the institutional provisions in Chinese companies have triggered branding scholar David Aaker to argue that most Chinese companies have weak branding (Aaker, 2013). He offers three reasons for the branding deficiencies in China. In his view, branding has not yet fully gained the necessary support from the top management in Chinese companies. Chinese managers still tend to focus on operational matters, costs, and finances and generally do not bring marketing skills to the table. Most importantly, they often lack international experience. The managerial focus on operations complements the second domain of reasons that Aaker identifies, and these include the lack of competition in China and the speed of the economy. Many state-owned enterprises (SOEs) have traditionally not needed to fear competitive behaviour. At the same time many Chinese companies have been busy with producing and distributing their goods just to meet the growing demands of the prospering Chinese consumer. Brand differentiation was simply not an obvious priority in many Chinese industries. Lastly Aaker states that due to the lack of a branding tradition in China, experienced brand managers are rare and this comes along with a lack of branding systems and established branding processes (Aaker, 2013).

Aaker’s arguments find eloquent support in the paucity of Chinese brands in Interbrand’s Top 100 Global Brand List. As mentioned above, only two Chinese brands have only recently made it onto the list. Yet, several valuable brands lead the way in the Chinese market. These are mainly young brands in the technology sector that show marketing excellence (see e.g. Tencent and Alibaba). Their brand success may lead other companies to invest more professionally in their brands. Furthermore, it may be assumed that with the ongoing rise of household purchasing power, Chinese consumers will become less cost-conscious and more brand-conscious, leading to a consumer-driven pull for desirable Chinese brands. The increased need for brand differentiation will thus come naturally to the attention of top-management. Branding and brand management practices will likely gain momentum.

That Chinese consumers have a preference for Western brands over Chinese brands will be discussed in the next section.

5. Foreign Vs. Domestic Brands – Consumer Preferences

In China, foreign multinationals have been very successful in marketing their brands as Chinese consumers continue to hold foreign brands in high esteem. Best practices have come from many foreign luxury automobile makers such as Audi, Porsche and Lexus, FMCG makers such as Procter & Gamble, or fast food chains like KFC and McDonalds to name a few (George and Anandkumar, 2015).

A survey was conducted in 2014 in Wuhan, China to identify and understand the brand preferences of Chinese consumers for Chinese or foreign brands. Wuhan is the provincial capital of Hubei province with a population of nearly 8 million (Statista, 2015). This specific location was chosen as Wuhan is a second-tier city in China where consumer behaviour is evolving as rapidly as in first-tier markets like Beijing and Shanghai. A sample of 600 young Chinese adults aged 18-25 was surveyed. This age group, also referred to as “Millennials”, generally receives much attention from marketers around the world. Most of these young

consumers are digital natives and their spending power seems bound to increase in China. The interviews took place face-to-face where the interviewees were guided through a self-administered questionnaire. Most of the questions were “top of the mind” questions leading to rating scales or frequency calculations. The method was chosen as it best suited a randomly selected area sample. Selected results from the study will be presented and discussed below. The interviewees were first asked to name their three favourite brands, top of the mind. Table 1 exhibits the results of this question. Apple leads the brand ranking followed by its main rival Samsung. In total five American brands were mentioned with German, Korean, Japanese, and Italian brands also having multiple entries in the ranking. It is remarkable, that no Chinese brand made it into the ranking by the sampled.

Rank	Brand	Industry	Country of origin
1	Apple	Mobile Phones	USA
2	Samsung	Mobile Phones	South Korea
3	Sony	Entertainment	Japan
4	Pizza Hut	Fast Food	USA
5	Adidas	Sports/Athletics	Germany
6	McDonald's	Fast Food	USA
7	Nike	Sports/Athletics	USA
8	KFC	Fast Food	USA
9	Lamborghini	Automobiles	Italy
10	Laneige	Beauty Care	South Korea
11	Lancôme	Beauty Care	France
12	Ferrari	Automobiles	Italy
13	MAC(Apple)	Personal Computers	USA
14	Mercedes Benz	Automobiles	Germany
15	Uniqlo	Apparel	Japan

Table 1. Favorite Brands

Source: (Bakker, 2016)

Respondents were further asked to rate the importance of six factors when purchasing a brand. The scale per item ranged from 5 to 1, with 5 being very important and 1 not important at all. Table 2 summarises the mean value per item.

Item	Mean value
Trust in the brand	4.82
Size of the company	4.1
Quality of the product	4.57
Reliability of the product	4.47
Price	4.16
Image of the brand	4.41

Table 2. Importance Factors when purchasing a brand

Source: own research

For another six factors the interviewees were asked to rate Chinese brands and foreign brands. These factors were quality, brand performance, price-value, trust in the brand, service, and the brand image. In all factors, foreign brands scored significantly higher. In another question, the preference of foreign brands over Chinese brands was indexed. Table 3 summarizes the results with respect to 10 industries or product categories. Overall, the results show that in most categories, foreign brands are favoured. The strongest preference is yielded in foreign automobile brands, which enjoy a preference of 92% over their Chinese rivals. Foreign brands

are also largely preferred in the mobile phone sector (84%), watches (84%), and airlines (75%). Soft drinks are nearly at par with only a small margin in favour of foreign brands (51%-49%). These results are surprising given the strong American brands such as Coca-Cola and Pepsi in this category. Chinese consumers still like traditional Chinese flavours in soft drinks that are often tea-based (Euromonitor, 2013). Chinese brands in the soft drink category continue to be popular. The questioned sample only preferred Chinese brands over foreign brands in the refrigerator category with a 53% majority. It can be assumed that this preference is the merit of strong local brands in this category such as Hisense and Haier.

Category	Foreign brand in %	Chinese brand in %
Mobile Phones	84	16
Automobiles	92	8
Apparel	58	42
Sportswear/Athletics	55	45
Soft Drinks	51	49
Personal Computers	66	34
Airlines	75	25
Watches	84	16
TV's	60	40
Refrigerators	47	53

Table 3. Preferences between Foreign and Chinese brands per category

Source: (Bakker, 2016)

The results show that overall foreign brands are mostly preferred by the sample surveyed. Due to the sample characteristics, the results cannot be generalised to yield hard data on the preferences of the 'average Chinese consumer'. Nevertheless the results confirm those from other studies in the field. Brand managers of foreign brands should build on creating further trust in their brands and emphasise quality as a key point of differentiation. The country of origin and implied exclusivity should also play a key role in the marketing programs for foreign brands. For certain product categories, entering the Chinese market may be more difficult as the results show. This is the case, for example, in the soft drink and white goods categories. In these instances, incumbent brands could learn from domestic brands as to what Chinese consumers value. In this context it is worth mentioning that foreign brand acquisitions by Chinese investors have been prominent in recent years. Some famous automobile brands such as Volvo, Saab, and Rover changed ownership and were kept alive by Chinese investors. Although struggling, these car brands are still stronger than most Chinese automobile brands, with high customer appeal. Another prominent foreign brand acquisition by a Chinese company was made by Lenovo, which purchased the ThinkPad brand from IBM, helping Lenovo to market leadership (Lenovo, 2004). The purchase of Western brands by Chinese investors remains prevalent. Wherever Chinese companies are lacking know-how or brand appeal, the acquisition of established Western assets will continue.

6. Summary, Conclusion, Limitations and Further Research

This paper examined the Chinese branding landscape and took a further look at the digital brands sector in China. Brand management practice and Chinese branding culture were highlighted and a consumer perspective on preferences towards foreign and domestic brands was researched. From these four areas, four branding trends were developed and are presented below.

- *Chinese Branding Trend #1: Brand Building As a Top-Management Priority*

Leading Chinese brands show the way in making strong and valuable brands. The success of Lenovo, Huawei, and Haier are good examples and strong advocates for the brand management discipline. When markets become more competitive and brand strategy calls for differentiation, brand strategy, as a top-management domain, will gain the attention in many other Chinese boardrooms. Moving past a production and distribution focus, branding will likely be recognised more prolifically by leadership as a competitive advantage in gaining consumer support and loyalty.

- *Chinese Branding Trend #2: More Chinese Global Brands*

Fuelled by government policies and successful Chinese brands abroad, more global brands from China will emerge on the world stage. Although China represents an enormous domestic market, when growth slows down, Chinese companies will have to look beyond their own borders. Then, strong branding will play a key role to overcome the inferior ‘Made in China’ image to which Western consumers still widely subscribe. With brand building becoming more the norm in Chinese corporate strategy, together with production cost-advantages and technological know-how, Chinese corporations will be fierce competitors on the global brand stage. White-goods products, consumer electronics, digital brands, and smart-phones in particular will likely be internationally branded.

- *Chinese Branding Trend #3: Extension of the Corporate Brand*

As in many other Asian markets, Chinese companies favour a corporate brand strategy. Building large brands and exploiting corporate brand equity appeals to managers and Chinese consumers alike. Similar to South Korean and Japanese corporations, Chinese companies will continue to stretch their corporate brands both into new fields of business and across product lines. This can already be witnessed with digital brand Alibaba, which uses its name across diverse business fields and Huawei, which displays the corporate name on a wide range of consumer products and industry services.

- *Chinese Branding Trend #4: Foreign Brand Appeal and Acquisition On the Rise*

Strong foreign brands are widely preferred by Chinese consumers. This trend will continue as long as foreign brands can keep a preferred spot in the Chinese consumer’s imagination. Product categories where quality, trust, and brand image are important will continue to have an advantage over Chinese counterparts. At the same time, foreign brands will continue to fall into Chinese ownership. Access to foreign distribution systems, technology transfers, or prestige of ownership can be key motivators for Chinese companies to hold stakes in foreign brands. Sectors of interest will be in the technology sector, B2B markets, automotive and Western football clubs.

These four branding trends are not exclusive to the Chinese market. Rather, they represent likely outcomes in the four areas broached in this research. That said, domestic and foreign marketers can include these trends in their efforts to build brands for the Chinese market. The former may further consider the branding discipline as a priority in their attempts to capture consumer loyalty in China. The latter can embrace typical Asian branding strategies and get a better understanding of Chinese consumer preferences when reviewing their Chinese marketing strategy.

Although this research provides initial insights into the Chinese branding landscape and possible branding trends, further research using different samples, product categories and research methodologies is necessary to establish the robustness of these findings. Each of the established four Chinese branding trends above would require a separate examination on its own for further substantiation. Moreover, the research focused on China’s biggest brands, leaving out second- and third-tier brands that make up a large part of the country’s branding landscape. Another interesting area of further research may be found in the rapid development

that marks the Chinese digital sector. Only currently established brands have been highlighted amidst a plethora of nascent and promising brands.

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