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WHEN A LOCAL COMPETITOR (SLIGHTLY) SHAKES UP THE GLOBAL GIANT:
A CASE ON THE SOFT DRINK MARKET

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Dissertação apresentada à Escola de
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Fundação Getúlio Vargas como requisito para
obtenção do título de Mestre em Gestão
Internacional

Campo do conhecimento: Marketing
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To my dear friend M. Mouton.

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ABSTRACT

Global brands have retained much attention in the marketing field (Kotler, 1997; Holt, Quelch, and Taylor, 2004; Özsomer and Altaras, 2008) while local brands have often been underestimated (Ger, 1999; Schuiling and Kapferer, 2004). Nevertheless, the adaptation-standardization debate has been widely discussed. It focuses on defining how an international company should build its strategy: by standardizing its marketing strategy or by adapting to better fit with local needs and culture (Levitt, 1983; Subhash, 1989; Herbig, 1998; Holt, 2004; Melewar and Vemmervik, 2004; Heerden and Barter, 2008). However, this subject has not been discussed in the specific context of alternative consumption offered by specific local competitors. Nowadays, an increase in the offer of alternative products is observed. The socially responsible consumption is growing (Sen and Bhattacharya, 2001; Holt, 2002; Loureiro, 2002; François-Lecompte and Valette-Florence, 2006). The cola soft drink market is of particular interest. Alternative colas are cola soft-drinks that have been emerging during the last decade in some regions or specific zones of the world. These colas clearly position themselves as an alternative to the global Coca-Cola soft-drink. The alternative is not built on price but on special characteristics of the products that usually constitute a specific value proposition, different from Coca-Cola. In France, for one decade, regional colas have grown in number, being more than fifteen today. Breizh Cola has been launched in 2002 and achieves almost a 10% market share in the Brittany region today. In 2009, Coca-Cola Entreprise started a specific marketing campaign in Brittany based on regional visuals and partnerships. This case of adaptation in a context of specific local competition is explored in this thesis which focuses on the reasons of the preference for Breizh Cola on the one side, and on the actions undertaken by Coca-Cola in Brittany on the other side. This study shows that Coca-Cola walks in the footsteps of Breizh Cola in order to better meet local expectations.

KEYWORDS:

Soft drink, cola, adaptation, standardization, globalization, glocalization, anti-globalization, anti-Americanism, socially responsible consumption, regionalism, local competition, marketing strategy.

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I. Introduction

I.1. Context

I.1.1. The Coca-Cola Company and Coca-Cola Entreprise in the Soft Drinks Market: World and French Overviews

Coca-Cola is often taken as a symbol of the so-called globalization. The Coca-Cola Company was created in 1892 in the United States. The Coca-Cola drink was invented in 1896 (Euromonitor International, 2010, p.30). There is no denying that Coca-Cola is the major player on the soft-drink market worldwide. Coca-Cola is indeed the world leader with net sales of 22,29 billion euros in 2009 (Xerfi Global, 2010, p.14. See **Exhibit 1**). It is headquartered in Atlanta. 13,9% of its net sales are made in Europe (Xerfi, 2010, p.66. See **Exhibit 3**). Contrary to PepsiCo, Coca-Cola profits come mainly from overseas, around 80% (Xerfi, 2010, p.68). The sales in France represent 2 billion euros (Botta, 2011). Leaders on the soft drink market are mainly American and Japanese. Coca-Cola is challenged by PepsiCo which is, contrary to Coca-Cola, also an important actor on the food market. In other words, Coca-Cola is a pure player while PepsiCo is a diversified company (Xerfi Global, 2010, p.17). The largest consumer markets of soft drinks are the Northern American and the Western European markets. These markets are mature compared to countries such as Mexico, India, China, or Brazil. Per capita household consumption is higher in mature markets than in high growth markets such as Mexico, India, China, and Brazil, where, on the contrary, growth of per capita household consumption is higher than in mature markets (Xerfi Global, 2010, p.33. See **Exhibit 2**). In 2010, Coca-Cola has been ranked the number one brand by Interbrand in the best global brands report for the 11th year in a row (Interbrand, 2010, p.4), and ranked the 6th most valuable brand in the world by Millward Brown Optimor in the Brandz ranking 2011 (p.12). The Coca-Cola Company manufactures and distributes concentrates to more than 300 third-party bottlers who produce, package, distribute and merchandise Coca-Cola products worldwide. The Coca-Cola Company offers more than 3500 beverages in more than 200 countries (The Coca-Cola Company, 2011a).

In France, The Coca-Cola Company has two subsidiaries: Coca-Cola Services France, which takes care of long-term development of brands, communication, consumers' relations and consumers' marketing; and Varoise de Concentrés S.A. which produces concentrates, syrups, and juices. Then, there are three bottlers which are Coca-Cola Entreprise, the main

one, producing Coca Cola beverages for the entire France and taking care of commercialization and distribution, especially promotion in points of sales; Coca-Cola Production which is a subsidiary of Coca Cola Entreprise that produces for France and Benelux; Socobo, a bottler for the Corsica region only. Coca-Cola Entreprise is a subsidiary of Coca Cola Entreprises Inc., a bottling company that produces, markets, and distributes soft drinks. The firm operates in Great Britain, France, Luxemburg, The Netherlands, Belgium, Norway and Sweden. Its headquarter is in Atlanta. Coca Cola Entreprises Inc.'s revenues reached \$21 645 million in 2009 (Datamonitor, 2010, p.4). In France, Coca Cola Entreprise has 7 regional directions and 5 production sites (Coca Cola France, 2011. See **Exhibit 4**). In France, Coca Cola products are sold in more than 400 000 points of sale: 70% in supermarkets, 25% on the away-from-home market, and 5% in automatic distribution (Coca-Cola France, 2011). On the French soft drinks market, colas represent 57% in volume and 55% in value of the soft drinks sold in supermarkets and hypermarkets (Xerfi 700, 2010). The soft drink market in France is clearly dominated by Coca-Cola brands. There are 50 Coca-Cola drinks of which 22 are without sugar (Xerfi 700, 2010, p.47). Coca-Cola regular has a 36,1% market share, Coca-Cola Light a 9,1% share, Coca-Cola Zero a 5,6% share (Xerfi 700, 2010, data from the April 2009-March 2010 period). Coca-Cola brands represents a 53,5% of supermarkets sales in value on the soft-drinks market between April 2009 and march 2010 (Xerfi 700, 2010, p.13). The main competitor in France is not PepsiCo but Orangina Schweppes with a 19% share on the soft drinks market (Oasis, Schweppes, and Orangina brands) but PepsiCo Tropicana juice brand is very successful (Xerfi 700, 2010, p.39). Private labels are significant competitors on the fruit juices' market but they are far from dominate the soft drink market since they only represent 9,9% of sales' value on this market (Xerfi 700, 2010, p. 9). Coca Cola Entreprise's sales decreased by 4,7% in 2009 reaching 1 850 million euros. However, sales increased by 26% over the 2005-2009 period (See **Exhibit 5**). On the cola soft drinks segment, Coca-Cola has an 83% market share while Pepsi one is around 2% (Botta, 2011). In France, the 2011 soft-drinks' volume growth forecast is 6% (Xerfi 700, 2010, p.8).

Since 2000, Coca-Cola strategy evolved towards more regional freedom in the company and thus more local adaptation of both products and communication strategies. Indeed, the Coca-Cola Company has started to grant more freedom to its Euro managers in 2000 (Echikson, William, Foust, Dean, 2000). Coke's chief executive from 2000 to 2004, Douglas N. Daft, loosened up the company's bureaucracy. Decisions about advertising, packaging, and even products, were, before 2000 (CEO Douglas Ivester), completely coming

from Atlanta. As Daft said, Coca-Cola “used to make TV commercials in Atlanta for China. That's not appropriate”. Since 2000, European instead of American managers have been running most of the European units. This increase in freedom is illustrated by several decisions taken at the local level. For instance, some local teams are developing flavors especially for European consumers. In Germany, a berry-flavored Fanta has been launched. In Turkey, a pear-flavored drink has been created. Besides, managers can sponsor local sport teams. Coca-Cola has suffered from a Coke contamination in Belgium in 1999. Since Coca-Cola’s “localism” has been implemented, the brand seems to regain trust but it is a hard task for global companies to go “native”. For instance, in France, McDonalds started to use local products in order to improve its image but it did not impede French farmers to destroy a restaurant in 1999 (Echikson, William, Foust, Dean, 2000). A concrete example of local freedom is the fact that in 2003, Coca-Cola Classic budget was given to various agencies such as Mother in London, Berlin Cameron in New York and BETC Euro RSCG in Paris (Statégies, 2004). It should be noticed that taking regional aspects into account was not totally new in 2000. For instance, as detailed below, Coca-Cola launched a guaraná soft drink in 1997 in Brazil to fit with the local taste. Nevertheless, Coca-Cola is usually perceived as a global brand offering the same product the same way all over the world. It is true that the graphic standards used for adverts or communication support in retail outlets are always the same, wherever the customer is. In fact, this is not always the case since this thesis shows how Coca-Cola exceptionally adapted its graphic standards in Brittany, a French region where a local competitor is becoming pretty strong. This competitor is Breizh Cola, an alternative regional cola which now has a 10% market share in Brittany, a region where regional cultural identity is very strong.

I.1.2. Local Players as Specific Competitors

Coca-Cola is the soft drink world leader but it does not mean it is invincible. Even leaders face competition. As it has been shown, Coca-Cola faces competition from other world leaders, especially its historic challenger PepsiCo. Private label products are also competing with Coca-Cola products since they are now seen as quality products by consumers (Datamonitor, 2010, p.9). Besides, this thesis underlines that local players are specific competitors of the global giant. A map of famous distinctive regional soft drinks and alternatives colas is offered below (**Figure 1**). The map is not exhaustive. It aims at giving an overview of important local soft drink players and at giving a base for the study of local

adaptation by Coca-Cola. As explained below, some of the soft drinks appearing on the map have been bought out by Coca-Cola and are thus not considered as competitors anymore.

Regional distinctive soft drinks can be defined as soft drinks that have kept for many years consumers' preference in some countries of the world. These soft-drinks usually have something very specific compared to the classic cola soft-drink, such as a different flavor or a different color. They illustrate well how local drinks constitute a specific competition for Coca-Cola. In Brazil, in 1997, Coca-Cola launched Kwat, a guaraná soft drink (The Coca-Cola Company, 2011b; Coca-Cola Brasil, 2011. See **Exhibit 6**) to compete with the historic Brazilian soft drink called Guaraná Antarctica created in 1921 (Antartica, 2011. See **Exhibit 7**). The Coca-Cola Company asserts that "In Brazil, drinks flavored with the guarana berry are a local favorite. Our guaraná drink, Kwat, was carefully developed to appeal to local guarana drinkers" (The Coca-Cola Company, 2011b), thus showing its interest for local adaptation. Many other cases are relevant. In Russia, Coca-Cola created Krushka and Bochka kvass drink (RT, 2011) to compete with the traditional kvass brown drink. Coca-Cola also bought out several regional soft-drinks such as the yellow Inka Cola in Peru in 1999 (The Coca Cola Company, 2011c), the pink Guaraná Jesus in the brazilian Maranhão region in 2001 (Renosa, 2011), the cola called Thumps Up in India in 1993 (Coca-Cola India, 2011). Many other distinctive regional soft-drinks exist: Irn-Bru in Scotland (Barr, 2011), Selecto in Algeria (Hamoud Boulaem, 2011), etc. This overview shows that Coca-Cola is all but alone and has to face competition from these specific distinctive soft drink companies.

Alternative colas are cola soft-drinks that have been emerging during the last decade in some regions or specific zones of the world. The products discussed here are all carbonated cola soft drinks. A carbonated soft drink is a non-alcoholic beverage that has been made fizzy through the carbonation process (Xerfi Global, 2010, p.22). These colas clearly position themselves as an alternative to the global Coca-Cola soft-drink. The alternative is not built on price but on the intrinsic characteristics of the products that usually constitute a specific value proposition, different from Coca-Cola. The overview of alternative colas offered in this introduction is not exhaustive but reveals the diversity of the exiting alternatives to Coca-Cola. The main fair trade, organic, humanitarian, and religion-based colas are described here (a focus on French regional colas is offered in the paragraph below). There are three French fair trades colas, which are also regional drinks, as described in the next paragraph. These colas are Beuk Cola, Ehka Cola, and Meuh Cola. In 2007, another fair trade cola certified by Max Haavelar has been launched in the UK. It is called Ubuntu. It is made with fair trade sugar from the Kasinthula Cooperative in Malawi and from the Kaleyá Cooperative in

Zambia. A part of profits goes to the Ubuntu Africa Programme (Ubuntu, 2011. See **Exhibit 8**). Then, Bio Cola has been launched by Oxfam in 2009. It is both an organic and fair trade product made with sugar from Paraguay (Ethik Boisson, 2011. See **Exhibit 9**). Another kind of alternative cola is the brand-new humanitarian cola, Uman cola born in France in 2011. 50% of the profits go to two organizations: Action Contre la Faim and A Chacun son Everest. Uman Cola is sold in four Leclerc supermarkets in Brittany and in all Franprix supermarkets in France (Uman Cola, 2011. See **Exhibit 10**). Other famous alternative colas are those targeting Muslim people. The most famous muslim cola, Mecca Cola, has been created in France in 2002. Mecca cola is now sold in more than thirty countries. Mecca Cola is now based in Dubai but still made in France. The Mecca Cola World Company has regional offices in France, the UK, Algeria, Morocco, Malaysia, Gabon, Pakistan. Mecca Cola aims at “drinking committed”. Indeed, a part of profits go to Palestinian organizations. The founder Tawfik Mathlouthi (involved in several court cases concerning the management of Mecca Cola) asserts that he is not anti-Jewish but only anti-Israel, anti-Zionist and pro-Palestinian (Mecca Cola, 2011; Mongaillard, 2004). Another muslim cola which is pretty famous is Zam Zam cola. Since 1998, Zam Zam is known as the Iranian cola apparently due to its first factories’ location (Theodoulou, Bremner, McGrory, 2002) but the company ZamZam refreshments is now headquartered in the United Arab Emirates (ZamZam refreshments, 2011). The cola name comes from the Zamzam holy spring in Mecca (Theodoulou, Bremner, McGrory, 2002). According to Theodoulou, Bremner, and McGrory (2002), ZamZam was founded in 1954 and has been for many years the partner of Pepsi-Cola until their contract was ended after the 1979 revolution. Zam Zam soft drinks (various flavors) are distributed in UAE, Saudi Arabia, Iraq, Syria, Oman, India, and African countries such as Mali, Senegal, South Africa and Zambia (ZamZam Refreshments, 2011. See **Exhibit 11**). Arab Cola has also been created in France in 2002 to “offer a specific cola to the 100 million muslims in Europe of which 8 million in France”. It is now also sold in Italy and aims at growing on the European and Maghreb and Middle-East markets (Arab Cola, 2011. See **Exhibit 12**). Another muslim cola is Evoca. It has been created in UK and is now sold in France, South Africa, Germany, Italia, and Algeria. Evoca watchword is quality. Evoca cola contains extract of black seed (Evoca, 2011. See **Exhibit 13**). Black seeds are said to treat all pains due to Prophet Muhammad’s words (Al Habba as Sawda, 2011). At a national scale, and with a marketing based on patriotism, the Chinese group Wahaha launched Future Cola in 1998 (Miller, 2011). Wahaha asserts on its website that “with its unique characteristics of nationality, it has become one of the symbols of Chinese national brand” (Wahaha, 2011. See

Exhibit 14). Another example is Cola Turka which has been launched in 2003 in Turkey by the company Ulker (Cola Turka, 2011. See **Exhibit 15**).

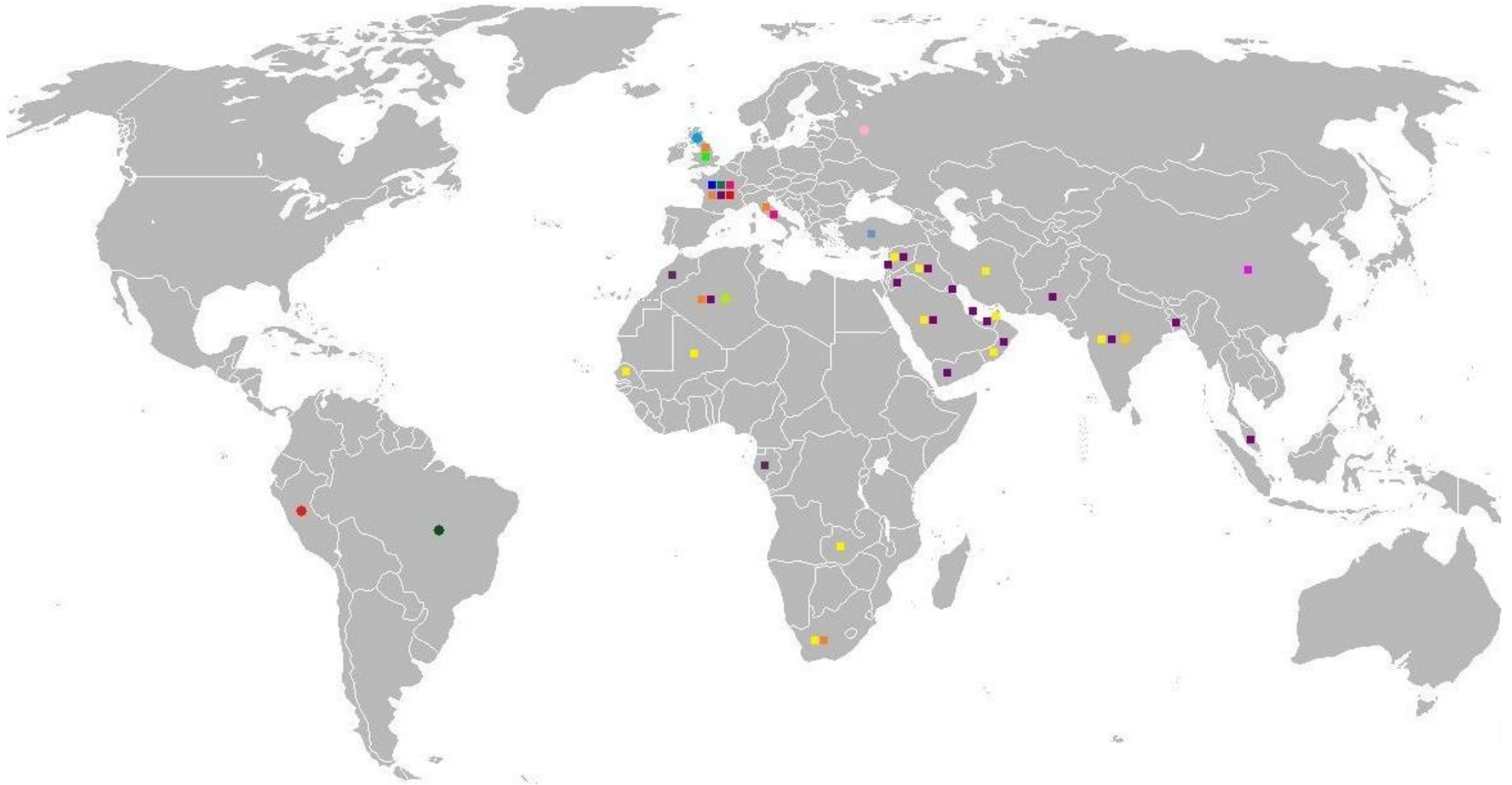
In this context of specific competition between local players and global leaders, namely Coca-Cola and Pepsi, this thesis focuses more specifically on a specific kind of alternative cola in France, the regional colas. For one decade, regional colas have grown in number, being more than fifteen today (see **Figure 2** for a map of French regional colas). In fact, each regional cola does not necessarily correspond to a French administrative region. Some of these colas are indeed marketed in non-administrative regions which can correspond to a department (region subdivision) or several ones. In 2002, the company Phare Ouest Productions and the Brasserie Lancelot were the first to launch a regional cola. The brewery launched Breizh Cola in Brittany region (Martel & Moreau, 2009. See **Exhibit 16**). In 2003, the Pietra Brewery launched Corsica Cola in Corsica (Brasserie Pietra, 2011. See **Exhibit 17**). Breizh Cola and Corsica cola are marketed as regional drinks and also insist on the quality of their products. Elsass Cola has been launched in 2004 by Lisbeth, a limonade and water company (Lisbeth, 2011. See **Exhibit 18**). The company Ouest Market markets Vendée Cola, Anjou Cola, and Poitou Cola. Vendée Market launched Vendée Cola in 2008 in the Vendée department which is a department in the Pays de la Loire region. Vendée Cola is marketed as a drink created to support local diversities and cultural heritage (Vendée Market, 2011. See **Exhibit 19**). Anjou Market has launched Anjou Cola in 2010 in the Anjou non-administrative region of Anjou which approximately corresponds to the Maine-et-Loire department in the Pays de la Loire. It is marketed as a citizen festal drink that also gives support to the cultural heritage of Anjou territory (Anjou Market, 2011). Poitou Cola has also been launched in 2010 in the Poitou-Charentes region by Poitou Market, also part of the company Ouest Market (Poitou Market, 2011). In the Northern part of France, Chti'la Cola has been launched in 2004 (Stratégies, 2004). In 2008, Chti'la Cola became Ch'Nord Cola due to a lawsuit forcing the company not to use the previous name anymore. In 2010, the right to use the name Chti'la was finally granted again to the creator Jean-Claude Delforge. In between, consumers have been lost and sales dropped. Jean-Claude Delforge is thus going to restart from scratch (L.L., 2010). Fada Cola has been launched in 2007 in the city of Marseille by the company Midi et Demi which markets the beer La Cagole (Midi et Demi, 2011. See **Exhibit 20**). Auvergnat Cola has been launched in 2009 by the food company Julhes and is bottled by a brewery in the Auvergne region (Julhes, 2011). Bougnat Cola is also marketed in Auvergne since 2009 by the company Audebert Boissons which makes limonades, colas and beers (Audebert Boissons, 2011). In 2010, Beauce Cola has been launched by a family in a village of 1700 inhabitants in

the Beauce, a natural agricultural region in the Centre, a French administrative region. The sugar for Beauce Cola comes from beetroot (Le Monde, 2010). In 2009, the Bourganel brewery has launched Cola'rdèche in Ardèche, a department in the Rhône-Alpes region (Brasserie Bourganel, 2011). There are two other regional colas in the Rhône-Alpes region. Alp'Cola has been created in 2005 by Brasseurs Savoyards. Alp'Cola is an organic product (Brasseurs Savoyards, 2011). Montania Cola has been created in 2010 by the company Routin, specialist of syrups and beers. The genepi plant from the mountains is one of the ingredients of Montania Cola (Routin, 2011). Besides, there are three fair trade regional colas in France. Beuk cola is a fair-trade cola produced in Brittany by the Kan Ar Bed cooperative. It is made with Costa-Rican sugarcane from the Coopecañera cooperative. Kan Ar Bed is distributor of fair trade products in alternative distribution network, bars, etc (Morlaix Communautés, 2008. See **Figure 2**). Another fair trade cola is Ehka Cola from the Basque Country in France, created by the company Alterka in 2003 with the support of Kan Ar Bed. It is a certified fair trade product by Max Haavelar. It is also made with Coopecañera cooperative's sugarcane (Alterka, 2011; Robert-Demontrond & Joyeau, 2004). Meuh Cola is the Normandy Cola since 2010. It is a fair trade and organic product (Solibulles, 2011. See **Exhibit 21**). The newest regional cola born in France is from Brittany. It is called Britt Cola and has been launched in June 2011 by Brasserie de Bretagne. It contains salted butter flavoring, a Breton specialty. A Brittany flag that really looks like the American one and a typical motorcycle on the bottle aims at recalling the positive values of the US, especially liberty (Pochet, 2011).

They are all regional colas since all their names are based on a regional belonging. Moreover, no one is distributed nationally. As explained, some of them only target a department; others target natural or historical regions. Many target an administrative region and the surrounding area. They all claim to be local but they try to differentiate through a specific ingredient, such as beetroot sugar and genepi plant, or a specific characteristic such as being fair trade or organic, being a festive or citizen drink. Most of these regional colas are distributed in supermarkets, except some of them such as Beuk cola, Ehka Cola, and Meuh Cola which are fair trade products and focus on small fair trade, organic or simply alternative point of sales. Some are way more discussed than others in the press, or on the internet in general. Some have very fancy and original websites such as the ones of Bournat Cola or Fada Cola. Others have high quality corporate websites such as Elsass Cola or Corsica Cola. Others have very simple internet pages such as Breizh Cola. Of course, success does not depend only on websites' quality. The most obvious case is that Breizh Cola is the most

successful while having a very simple web page. The success for all these regional colas is far from being uniform. All together in France, the regional colas only account for 1% of the French cola soft drink market, while Coca-Cola has an 83% market share. It thus clear that many regional colas have a tiny market share. Nevertheless, some regional alternative colas, namely Breizh Cola, Elsass Cola, and Corsica Cola, have between 7 and 10% of the market in their respective regions which are Brittany, Alsace, and Corsica (Botta, 2011). In this context, through the case study of Breizh Cola and the specific actions undertaken by Coca-Cola in Brittany, this thesis studies a specific case of competition between a local player and a global giant on the French cola soft-drink market.

Figure 1. Main Distinctive Regional Soft Drinks and Alternative Colas in the World



Source: created by the author from websites cited in the introduction part.

Map's Legend

Alternative colas

- French regional colas (See **Figure 2**)
- French fair trade colas: Ekha Cola in Basque Country, Beuk Cola in Brittany
- Humanitarian cola: UmanCola in France
- Fair trade cola Ubuntu in the UK
- Arab Cola. Born in Nice, South of France. Now also sold in Italy
- Mecca Cola. Produced in France. Sold in more than 30 countries (main markets appear on the map)
- Evoca Cola. Born in the UK. Sold in France, South Africa, Germany, Italia, and Algeria
- Zam Zam Cola. Born in Iran. Sold in Middle East, Asian and African countries
- Future Cola in China
- Cola Turka in Turkey

Distinctive Regional Soft Drinks (some of these are also distributed in neighbor countries)

- Selecto in Algeria
- Irn-Bru in Scotland
- Kvass in Russia, and Eastern Europe
- Guaraná Antartica in Brazil and Guaraná Jesus in the Maranhão Region
- Thums Up in India
- Inka Kola in Peru

Figure 2. French Regional Colas



Source: created by the author from websites cited in the introduction part.

I.2. Problem

Some global brands, such as Coca-Cola, are so widespread that one may think that a local competitor is never an issue for an MNC. Global brands have retained much attention in the marketing field (Kotler, 1997; Holt, Quelch, and Taylor, 2004; Özsomer & Altaras, 2008) while local brands have often been underestimated (Ger 1999; Schuiling and Kapferer, 2004). Nevertheless, the adaptation-standardization debate has been widely discussed. It focuses on defining how a an international company should build its strategy: by standardizing its marketing strategy or by adapting to better fit with local needs and culture (Levitt, 1983; Subhash, 1989; Herbig, 1998; Holt, 2004; Melewar and Vemmervik, 2004; Heerden and Barter, 2008). However, this subject has not been discussed in the specific context of alternative consumption offered by specific local competitors. Nowadays, an increase in the offer of alternative products is observed. The socially responsible consumption is growing (Sen and Bhattacharya, 2001; Holt, 2002; Loureiro, 2002; François-Lecompte and Valette-Florence, 2006). The cola soft drink market is of particular interest. Indeed, alternative colas have been emerging during the last decade in some regions or specific zones of the world. These colas clearly position themselves as an alternative to the global Coca-Cola soft-drink. The alternative is not built on price but on special characteristics of the products that usually constitute a specific value proposition, different from Coca-Cola. In France, for one decade, regional colas have grown in number, being more than fifteen today. Breizh Cola has been launched in 2002 and achieves almost a 10% market share in the Brittany region today. In 2009, Coca-Cola Entreprise started a specific marketing campaign in Brittany based on regional visuals and partnerships. By studying a specific case of local competition faced by Coca-Cola, the aim is thus to fill a gap in the marketing field. No specific case of competition between a French regional cola and the global leader Coca-Cola, and a consequent adaptation by the global leader, has been treated in the academic field. Meanwhile, there are plenty of newspapers, magazines, and social networks that discussed and are still discussing this phenomenon.

I.3. Objective

The general aim of this thesis is to gain strong insights into the Breizh Cola regional consumption phenomenon and the reaction of the soft drink market leader Coca-Cola. To be more concise, the objective of this thesis is twofold. The first goal is to understand the

preference for Breizh Cola. To do so, the research question to be answered is: Why do many customers prefer buying the regional soft drink Breizh Cola? The second aim is to observe how the leader Coca-Cola reacts. The second research question thus is: how does Coca-Cola react to this specific regional competition and act in Brittany? This study shows that Coca-Cola walks in the footsteps of Breizh Cola in order to better meet local expectations.

I.4. Justification

The subject chosen is topical and can thus be useful for various actors. It is of course of interest for marketing researchers and students. This work aims at bringing some new highlights to the international marketing field. Then, it is of interest for MNCs since this thesis looks for elements explaining the success of a local player offering a product quite similar to the one already offered by the global leader. It is also interesting for local players to know about the potential reactions of a leader they are challenging.

As defined by Maxwell (1996, p. 14), the purpose of a study in a broad sense includes goals, motives and desires. Here are detailed the motivation for doing this specific study. Personal purposes are those that motivate the researcher to do a specific study (Maxwell, 1996, p.15). Coming from Brittany, the main personal purpose of this research is a curiosity about a current phenomenon, namely the success of Breizh Cola in stealing market share to Coca-Cola. Besides, competition between local and global players in the food industry is a fascinating subject. As explained in the methodology part below, qualitative research has been chosen because it is the design that fits the best with the aim of gaining insights into a phenomenon. Nevertheless, this choice is also tied to a second personal purpose which is to follow the desire to engage in a qualitative research. Qualitative research consists in meeting people, understanding their behavior, asking about their opinions, etc. It really enables to lead a deep research by focusing on specific situations and people. The subject chosen allows to do so. Research purposes are those explained in the objective part. Finally, a practical purpose, which focuses on meeting some need or achieving some goal (Maxwell, 1996, p.16), also led to this research. Indeed, this thesis aims at completing a Master in International Management at FGV-EAESP.

I.5. Structure of the thesis

First of all, the main theoretical references for our subject are discussed. The literature review examines the academic findings in relation to the present research. Therefore, a focus on each relevant study in the international marketing and consumer behavior fields is offered to strengthen this thesis by making it coherent with the past researches. The subjects discussed are: globalization and glocalization; global brands and the standardization versus adaptation debate; anti-americanism and anti-globalization; the country-of-origin effects; local competitors assets and local brands; consumer culture theory, consumer resistance and socially responsible consumption, regional cultures as a specific marketing resource.

Then, details about the research methodology are given. The exploratory research design is justified. Secondary data are considered as the basic source of evidence. Primary data are those created by a qualitative research strategy which consists in an embedded single-case study. The main source of evidence for the case study is a set of fourteen in depth interviews of consumers/shoppers, sector's professionals, and a Coca-Cola manager. The worldview followed in this research is pragmatist. Finally, the issue of validity is discussed. In particular, proofs of reliability are detailed.

Afterwards, the case study results are exposed. An overview of Breizh Cola in Brittany is offered. Consumers' preference for Breizh Cola is defined. Buying Breizh Cola gives the opportunity to avoid Coca-Cola, which illustrates anti-Americanism and anti-globalization. Then, Breizh Cola materializes the Breton feeling of belonging. Also, choosing Breizh Cola is a socially responsible purchase. Besides, consumers like Breizh Cola's taste. It is also perceived as a successful product. Finally, these factors of success are supported by Breizh Cola's efficient marketing strategy

The thesis is finally summed-up. The conclusion first focuses on the main findings of the thesis. It then states the limitations of this thesis and suggests further research.

II. Literature Review

II.1. Globalization and Glocalization

We generally define globalization as the increasing integration of economies, namely financial markets and goods and services markets, around the world, and goes with a global liberalization (Feenstra, 2007). But it is not a simple process. As argued by Scholte (2008,

p.1473), globalization cannot be a simple synonym of internationalization, liberalization, universalisation, or westernization. According to Scholte, these are redundant concepts. They cannot entirely define globalization. Nevertheless, they are key elements in the process of globalization. Internationalization is the growth of transactions and interdependence among countries. Liberalization is the “process of removing officially imposed restrictions on movements of resources between countries in order to form an ‘open’ and ‘borderless’ world economy” (Scholte, 2008, p.1475). Universalization is a process of dispersing diverse objects or experiences to people in every part of the world (Scholte, 2008, p.1476). With this meaning, global is thus equivalent to worldwide or everywhere. Globalization as universalization generally implies homogenization and a cultural, economic, legal and political convergence. Westernization is then a particular form of universalization coming from the Western society, built on capitalism, industrialism, urbanism, and this process destroys “pre-existent cultures and local self-determination” (Scholte, 2008, p.1477). According to Scholte, these four conceptions do not exhaust the definitions of globalization. Scholte goes further these conceptions and suggests a fifth one. According to him, a relevant vision of globalization is the spread of transplanetary connections between people. People engage physically, linguistically, culturally for instance with people from all over the Earth (Scholte, 2008, p.1478).

More complex is the vision of globalization developed by Ritzer. Globalization is in fact made of two central processes, which are glocalization and grobalization. The modernization theory argued that the world would develop following the Western democratic, capitalistic, and consumption-oriented model. At the opposite, glocalization is an interpenetration of the global and local that results in specific outcomes in different geographic areas (Ritzer, 2003, p.193). It thus implies a global heterogeneity and goes against the idea that the West and the US in particular are leading all the globalization process building an economic, political, institutional, and cultural homogeneity (Ritzer, 2003, p.194). While rejecting most of the modernization theory but retaining a focus on Westernization and Americanization in the process of globalization, grobalization complements glocalization. Nations, organizations, companies, have indeed an imperialistic ambition. They want their influence and/or their profits to grow over various geographic areas. Globalization cannot be resumed to one direction since these two processes coexist. But these processes are kind of opposed. Indeed, what is particularly interesting for this thesis is the idea, defended by Ritzer, that grobalization is associated with nothing and glocalization with something, along with the local. Nothing is “a social form that is generally centrally conceived, controlled, and

comparatively devoid of distinctive substantive content” while something is “a social form that is generally indigenously conceived, controlled, and comparatively rich in distinctive substantive content” (Ritzer, 2003, p.195). For instance, a credit card is nothing because it is centrally conceived and controlled by the company and there is not much to distinguish one credit card from another. A Gucci bag is nothing because it is mass-produced and not tied to any person or specific service. On the contrary, a line of credit negotiated by local bankers and personal clients is one thing. Nothing goes with a nonplace, a nonperson, a nonservice while a thing goes with a place, a person, a service. Most of the times, there is a relationship between nothing and global and something and glocal (even if there are in-between situations). Nothings are often mass-produced and mass-distributes. Ritzer speaks about Coca-Cola as nothing and thus the sales of Coca-Cola as a globalization of nothing (Ritzer, 2003, p. 199). Nevertheless, if demand grows and that an entrepreneur thinks there is a global market for a something, it would probably become a glocal nothing (Ritzer, 2003, p. 202), or a global something but this is less probable since the soft-drink would become produced at a very large scale, with no more tie to the local place.

Another fact to notice is that globalization is far from being total. As assessed by Rugman & Verbeke (2004), Multinational Enterprises are the drivers of the globalization process since they foster economic interdependence among national markets. Nevertheless, their observations remind us that globalization is not so global. The vast majority of the 500 largest MNEs’ sales are made at home. The level of market coverage is not as global as one could imagine. In fact, very few of the top MNEs are really successful globally. “For 320 of the 380 firms for which geographic sales data are available, an average of 80.3% of total sales is in their home region of the triad.” (Rugman & Verbeke, 2004, p.3). Ohmae (Rugman & Verbeke, 2004, p.4) speaks of global impasse to describe the problems faced by the largest companies to repeat their home performance even in the two other triad markets. Very few firms succeed to do so, but Coca-Cola did. Coca-Cola is a triad power, which means, following Ohmae’s definition “a company that has equal penetration and exploitation capabilities, and no blind spots, in each of the triad regions” (Rugman & Verbeke, 2004, p.4).

In the article “Local consumption cultures in a globalizing world”, Jackson goes beyond the claim that we advance in the name of globalization. He prefers to talk about a globalizing world than a globalized one. Indeed, economic, political and cultural transformations are uneven. Products are not the same worldwide. Many producers customize their offer for different markets. Consumption is considered as a social practice, which varies according to places. Giving details about consumer nationalism in China, public culture in

India, and artful consumption in Russia, Jackson asserts there are various consumption cultures in the world (Jackson, 2004, p.166).

II.2.Global Brands and the Standardization Vs Adaptation Debate

A brand is traditionally defined as a “name, term, sign, symbol, or design, or combination of them which is intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competitors” (Kotler, 1997, p.443). Due to the globalization process, global brands are everywhere, on the streets, in stores, in the media... Global brands are defined as having “widespread regional/global awareness, availability, acceptance, and demand and are often found under the same name with consistent positioning, personality, look, and feel in major markets enabled by centrally coordinated marketing strategies and programs” (Özsomer & Altaras, 2008, p.1). Many researchers tried to answer the question: Why do customers prefer global brands? In the economic domain, global brands have the power to make consumers pay high price premiums with not much resistance. In the psychological domain, global brands are perceived as building identities among consumers, symbols, global values (Özsomer & Altaras, 2008, p. 1).

The debate “standardisation versus adaptation” can also be called “globalisation versus localization” and may also refers to “global integration versus local responsiveness” (Heerden and Barter, p.37).

As defined by Subhash C. J., “standardization of international marketing strategy refers to using a common product, price, distribution, and promotion program on a worldwide basis” (1989, p.70). In the HBR article published in 1983 “The globalization of markets”, Theodore Levitt announced that a global market for uniform products had emerged and that companies should grow through the sales of standardized products worldwide. He stated “Companies must learn to operate as if the world were one large market – ignoring superficial regional and national differences” (Levitt, 1983, p.92). The idea following this assessment was that MNCs should create standardized products, communication, and packaging in order to achieve the “least-common-denominator possible that would be effective across cultures” (Holt et al., 2004, p.68). This idea was popular during the 1980’s, when Japanese and American companies started entering new markets worldwide. Researchers defending standardization believe that differences across markets or cultures are not so huge. For instance, Herbig (1998, p.31) states that a common global culture emerges. Companies should thus focus on international common points over cultures rather than on differences.

Companies should thus act as a true global actors on a global unique market. This standardization can bring strong advantages due to lower costs. According to Melewar and Vemmervik (2004, p.863), the gain of standardization consists of synergies across markets and economies of scales. Besides, the brand will benefit from a particular image worldwide thus avoiding confusion for consumers, for instance when traveling. However, product standardization is increasing, but differences remain. The homogeneization is not total (Heerden and Barter, p.38).

On the other side, those who defend local strategies assert that differences between cultures are strong and that standardization could thus represent a loss of competitive advantage (Melewar and Vemmervik, 2004, p.863). On the contrary, being receptive to the local needs, a company can build a specific competitive advantage. Besides, having a successful marketing strategy worldwide, that is meeting consumers' needs worldwide, is very difficult. Adaptation allows marketers to take advantage of differences and have an efficient international strategy (Heerden and Barter, 2008, p.38).

As stated by Nagashima (1970, p.68), "the critical issue for international marketing is adjusting existing marketing strategies to the world market by taking into account such factors as language, customs, living standards, religion, and tradition". According to Heerden and Barter (2008, p.38), "the absence of the advantages that emerge from standardization is in essence the disadvantages of adaptation, and visa versa where the absence of the advantages of adaptation constitutes the very disadvantages of standardisation. In fact, considering the remaining existence of different cultures worldwide, a debate focusing on extreme position, that is choosing between standardization or adaptation makes no sense" (Heerden and Barter, 2008, p.39). In reality, the idea of standardization quickly slowed down since consumers were not so much into generic products. Therefore, companies started to implement "fashion hybrid strategies" (Holt et al., 2004, p. 68). Indeed, while their production, technology, and organization were considered globally, the products characteristics, ways of distribution, and sales practices were designed to fit with local tastes. The in-between solution is called "Glocalisation" and follows the logic "think global, act local" (Herbig, 1998, p.43). According to Heerden and Barter (2008, p.43), the target market must be studied to know which elements might be standardized in order to obtain economies of scale. At the same time, it may be necessary to customize some elements for the strategy to be successful. Local culture needs to be considered in order to build the marketing strategy. Heerden and Barter conclude that "although a more localised strategy would possibly reach the market and achieve better results, a standardised strategy could provide relatively good results too,

with no additional cost of localization". In fact, marketers should "standardize marketing strategy as far as their markets will allow, and once that threshold is reached, localization needs to be considered". An international company should adapt to local culture and it is important for customers (2008, p.44). This idea developed by Heerden and Barter brings the same insight than the position of Baalbaki and Malhotra who assert that it is possible to obtain the advantages of both standardization and adaptation. Indeed, the company should standardize its marketing strategy in similar segments over the world but differentiate when segments are very different (1993, p.43). Finally, localization is often necessary but it really depends on the market concerned.

"Glocal strategies" have been the rule until now. But another element appeared at the beginning of our century. MNCs have been under critics, mainly through anti-globalization protests. The study led by Holt, Quelch, and Taylor (2004, p.68) for the article "How global brands compete", gives a good idea of the dilemma between the "aura of excellence" given by the only fact for a brand to be marketed worldwide, and the obligations implied by global branding. Famous cases are those of the most global brands we know, such as Coca-Cola, McDonald's, or Nike. Consumers, political parties, and NGOs criticize the globalization's side effects, such as children exploitation, threatening of local economies, pollution, and cultural imperialism. Consumers consider transnational corporations different from other companies. Indeed, Holt, Quelch, and Taylor conducted a research with 3300 consumers in 41 countries and found that people choose a global brand over another one because of the differences in brands' global quality (Holt et al., 2004, p. 69). That's why companies should learn how to manage their global characteristics. It is essential since future growth for most companies will be in foreign markets, especially in developing countries which will account for 90% of the world population of 9 billion in 2030, according to the World Bank (Holt et al., 2004, p.69). According to Holt et al. (2004, p.69), "the rise of a global culture doesn't mean that consumers share the same tastes or values". In other words, there is no homogenization, but there are for sure shared symbols. Global brand is one shared symbol. People may love them or not but they are not indifferent to them. Holt et al. found three global brands' characteristics according to which consumers evaluate global brands while purchasing. The first and main characteristic is quality signal. Global companies are perceived as offering better products, mainly because they compete fiercely to offer new products, key technologies... Thus, country-of-origin is no more the only quality criterion. This element is still important but only "one-third as strong as the perceptions driven by a brand's globalness" (Holt et al, 2004, p.70). The second characteristic is the global myth. Indeed, global firms

suggest global cultural ideas and symbols, they participate to the building of a global identity, belonging, citizenship (Holt et al, 2004, p.70). The third characteristic is social responsibility. People expect companies to positively influence society's well being by addressing social issues. Holt et al did not find an important anti-American sentiment in their qualitative research. Nevertheless, many consumers cared such as a French who spoke about "imperialistic threats that undermine French culture" (Holt et al, 2004, p.70). In fact, people may not like American world politics (Iraq war), but they still like American products. Interesting is the segmentation of consumers offered by Holt et al (2004, p.71). To succeed, global firms that usually compete with other global firms should not only focus on price, performance, features, but also on global characteristics of brands. First, executives should stop focus only on the least-global-denominator or only on glocal characteristics. They should keep in mind their status of global symbol. Second, they should manage the dark side, which means that they should try to build a positive image of the company. Third, they should build credible myths. Fourth, they should treat antiglobals as consumers. Antiglobals are those who are skeptical that transnational firms deliver higher quality goods, dislike brands focused on American values, and don't trust global companies. They represent 13% of Holt's research respondents (Holt et al, 2004, p.72). Holt's study showed that "one person in ten worldwide would not buy global brands if given a choice. That's an extraordinary number." (Holt et al, 2004, p.74). Companies cannot ignore this segment which represents potential consumers. Investments in social activities can convince the skeptics. Five, corporate social initiatives should not be hypocritical and opportunistic but should imply entrepreneurship such as finding solutions at the base of the pyramid.

These elements, developed by Holt et al, explaining how global brands appeal to consumers are reused in the article "Global Brand Purchase Likelihood: A Critical Synthesis and an Integrated Conceptual Framework", in which Özsomer & Altaras build "a model of global brand attitude and purchase likelihood" based on consumer culture theory/CCT, signaling theory, and the associative network memory model/ANMM (2008, p.1). The vision developed in this article is way broader than the one by Holt et al which aim was not to sum up all criteria in a model, but more to present an exploratory analysis with a deep qualitative study. This article says that several constructs from several theories have effects on global brand purchase likelihood. The first stream of research used is consumer culture theory. CCT focuses on the process by which consumers "appropriate and recontextualize the symbolic meanings encoded in marketer-generated goods to construct individual and collective identities" (Özsomer & Altaras, 2008, p.7). Global brand authenticity, cultural capital (the

myths that global brands provide evoked by Holt et al. create cultural ideals), and perceived brand globalness constructs are based on consumer culture theory. A focus on consumer culture theory is offered below. The second stream of research used is the signaling theory. Signaling Theory says that firms are encouraged to use brands as signals because of high consumer uncertainty and imperfect and asymmetric information in the marketplace (Erdem & Swait, 1998, p.135). A brand becomes a signal because “it embodies a firm’s past and present marketing strategies” (Erdem & Swait, 1998, p.136). Brands are credible market signals. The construct global brand credibility comes from the signaling theory. Brand credibility reflects to what extent the product position information contained in the brand is perceived as believable (Özsomer & Altaras, 2008, p.9). Then, in the ANMM theory, consumer memory is considered as a complex of nodes connected by relational links. Nodes store informations. “This network of brand associations constitutes the brand image and represents the perceived value of the brand in the eyes of consumers” (Özsomer & Altaras, 2008, p. 10). The constructs global brand quality, social responsibility, prestige, and relative price as brand associations, come from the associative network memory model. All these constructs explain the likelihood of a global brand’s purchase.

II.3. Anti-Americanism and Anti-Globalization

It is a common idea that American brands are often badly perceived, for instance McDonald’s or Coca-Cola are targeted by anti-American sentiments (Halpem, 2004). According to Martin, the 21th century is anti-American. The US have a dismal reputation: “in marketing term, America has a brand problem. America is “a brand,” not in the sense that the name itself has commercial value (though it does) or because it’s familiar from boardroom to backwater (though it is), but because the notion of America occupies a special place in the hearts and minds of people around the world” (Martin, 2007, p.54) This brand is tarnished today while it was symbol of freedom of opportunity during the 20th century. Martin notices that America is today a symbol of violence, money and sex. It is said to practice salvage capitalism and neocolonialism. Nevertheless, the US are not disliked uniformly and many people still admire the country, for instance for its entertainment products. In fact according to Martin, the issue is trust. While trust is the heart of branding, the US are no more trusted. A strong brand generates loyalty. This loss of trust is, according to him, based on doubts people have today concerning American competence. He mainly refers to Irak war and catastrophes such as Hurricane Katrina. It is also based on doubts concerning US sincerity. People accuse

the US to break with the values of “international law, universal human rights, and the peaceful resolution of conflicts” (Martin, 2007, p.56). What is more interesting for this thesis is the “perceptions of America as a materialistic, narcissistic society in which the powerful exploit” (Martin, 2007, p.56). For instance, many consider that US companies are obsessed with their stock price and, as a consequence, mistreat employees. According to Martin, American leading companies can’t change foreign policy, but they must reestablish their legitimacy in international markets. He notices that for many people, globalization and Americanization bring the same negative results. “No matter how “global” US-based businesses are, their American roots show”, hence the importance of managing their image. For Martin, the answer to fight anti-Americanism is better public relations, but not better advertising. Companies’ practices must fit with consumers and citizens’ needs and expectations: “Alleviating anti-Americanism is not a matter of patriotism; it is good business” (Martin, 2007, p.56). In the book “In Your Face: How American Marketing Excess Fuels Anti-Americanism”, Johny K. Johansson, a specialist of international marketing, focuses on one specific reason for anti-Americanism. He explains that this anti-Americanism is due to “marketing efforts that produced the fast-food nation. They have been the downfall of companies that market internationally and don't bother to be culturally sensitive” (Halpem, 2004). Consumers are more likely to attack fast foods, beverages companies or retail stores because they are industries’ leaders. Thus, consumers attack them instead of American electronics or automobile companies. Johansson thinks that American marketers should adapt more in foreign markets, even if beyond these reasons, there is also political aversion such as an anti-Bush sentiment during the Irak war (Halpem, 2004).

“It is wide in its tactics and ambitions, violent and revolutionary on the edges, peaceful and reformist in the main. It rushes in often contradictory directions, anti-corporate and entrepreneurial, anarchist and nostalgic, technophobe and futuristic, revolutionary and conservative all at the same time”. This phenomenon is usually called the “anti-globalization movement” (Green and Griffith, 2002, p.49-50). Discontent about globalization is due to a growth in its intensity as a public issue since the last twenty years. It is the political reaction in front of globalization issues that built this movement of movements. In the early 1990’s, there was a consensus over neoliberalism promoted by global institutions and powerful state players. The consequent erosion of national sovereignty made a protest grew to fight “the undemocratic and closed nature of increasingly powerful global institutions and the influence and lack of accountability of global corporations” due to the liberal globalization. Opposition to the liberal globalization grew with various crises such as the Mexican crisis in 1994 and the

Asian crisis in 1997 (Green and Griffith, 2002, p.52). It is not a single movement but rather a movement of movements or even a mood. The movement is made various labour organizations, environmentalists and development NGOs, some political parties, etc. and is not uniform. For instance, Green and Griffith (2002, p.57) notice that “anti-capitalism and anti-Americanism are two complex and cross-cutting issues which threaten to divide the movement” since anti-capitalism is strong among the alternatives, and quite recognized by the statist, while reformists thinks the market is useful. According to Green and Griffith (2002, p.50), the movement is not only “anti” but suggests changes on issues such as democracy, ecology, international trade rules. For instance, it aims at increasing grassroots participation, favoring accountability in policy-making and companies, improving environmental protection, reforming world trade rules in order to benefit the weakest countries and communities.

II.4. The Country-of-Origin Effects

As underlined by Bilkey and Nes (1982, p.89), the international product life-cycle need to be studied through supply-side variables on the one side, such as product competition, complexity of production, and production costs, and demand-side variables on the other side, such as the effect of the country-of-origin on the demand for a product. The significance of the location of production on demand can be approached as an information cue question. According to Bilkey and Nes, products consist of “an array of information cues, both intrinsic (taste, design, fit) and extrinsic (price, brand name, warranties)” (1982, p.89). Each cue, among which the country-of-origin, is a basis for the customer to evaluate the product. The country-of-origin (COO) effects describe how consumers perceive products coming from a particular country (Roth and Romeo, 1992). Country image is defined as a set of ideas, emotional background and connotation. It is the stereotype that people attach to products of a specific country. This image is the result of representative products, national characteristics or economic and political facts, tradition or history (Nagashima, 1970, p.68). As stated by Nagashima, “consumers attitudes toward the products of a particular nation are of major importance in determining international marketing strategies” because the country image perceptions have an impact on consumer behavior. According to Roth and Romeo (1992), a product-country match occurs when key dimensions for a product category are also associated with a country's image. A strong positive match happens when the country is perceived as being very strong in an area that corresponds to a feature for a product category.

Understanding favorable or unfavorable (mis)matches is useful to managers in order to improve the use of COO information in advertising. For instance “the presence of a favorable product-country match would indicate that the product's COO could enhance product evaluations. A favorable mismatch, however, would indicate that the COO would not enhance evaluations” (Roth and Romeo, 1992).

While Bilkey and Nes (1982, p.89) admit that usually the country-of-origin is communicated by the words "Made in (name of country)", according to Roth and Romeo, “The COO phenomenon mirrors the global marketplace's increasing complexity” (1992). Indeed, products may be designed in one country and manufactured in a different country. There are various COO effects, mainly the effects of country of design (COD), country of assembly (COA) and country of parts (COP) of a product (Chowdhury and Ahmed, 2009, p.496-497). Chowdhury and Amhed showed that when COD, COA and COP associations are available to consumers, they affect product responses in different manners. For instance, countries that already have positioned themselves with a positive reputation for specific skills related to product development and manufacturing may expect a transfer of those associations to new products from the country (Chowdhury and Ahmed, 2009, p.499). Recently, Balabanis & Diamantopoulos have studied the consequences of brand origin misclassification and non-classification on consumers’ brand image evaluations and associated purchase intentions. They have shown that misclassification and non-classification have adverse consequences on brand evaluations and purchase intentions. Hence, the importance of ensuring that consumers know the true brand’s COO (2011, p.96). As described by Bilkey and Nes (1982, p.90), referring to Nagashima (1970), Lillis and Narayana (1974) about the US and Japan and Bannister and Saunders (1978) for England, it is observed that consumers evaluate the products from their countries more favorably than foreigners do.

II.5. Local Competitors Assets and Local Brands

Local brands are defined as brands that exist in one country or in a limited geographical area (Wolfe 1991, p.49).

In the article “Localizing in the global village”, Ger (1999), explains how local corporations can compete with transnational ones in both home and foreign markets. Triad transnational corporations have a huge influence in determining what is produced and consumed worldwide. There are brands visible all over the world, such as Pizza Hut, Mc Donald’s, Benetton, Coca-Cola, BMW... When competitive strategies are discussed in the

global marketing field, the focus is on such transnational companies and more precisely how western firms can enter foreign markets (Ger, 1999, p. 64). But, as underlined by Ger, less powerful local companies are also part of the business area. Local firms are often threatened by transnational corporations at home, and abroad. But, Ger assesses “Local corporations cannot catch up with TNC’s who are far ahead in the road and going very strong. However, they can take a different road” (1999, p. 65). Indeed, local companies can operate in alternative domains. Thanks to a focus on their local cultural capital, local brands are able to “out-localize” the influence of global companies and brands in local and international markets owing to their deeper understanding of the local culture and market. As affirmed by Ger “the intrinsic advantage retained by local corporations is their local identity and culture” (1999, p.65). Local strategies define the authentic by focusing on cultural goods and products for local conditions. A positioning based on localness enable local players to make the most of their cultural capital, thus creating a unique perceived value through differentiation. For sure, global products provided by global firms are desirable in every society since they improve life (high-quality, modern, etc). But, consumers are interested in more than only standardized products. Consumers pursue the desire for social meaning (Ger, 1999, p.67). There is a revival of localism in consumption. People express a return to their local roots and reconfigure global goods and their meanings to fit with their local culture. Local is thus a good alternative to the “modern normal global” and local firms can reinvent, reconstruct and repackage local products. They can offer non-conformist or ethically concerned products (Ger, 1999, p.76).

Schuilung and Kapferer analysed local brand differences and competitive advantages relative to international brands (2004, p.97). They notice that in Europe, there are more local brands than international brands. For instance, in France, the most famous whisky is not J&B or Johnny Walker but Clan Campbell or Label 5. In Belgium, the leader on the mineral water market is Spa, a local company, which overtakes the international leader Evian (Schuilung and Kapferer, 2004, p.100). Local brands have strategic advantages. First of all, they have better response to local needs. They have more flexibility to answer local specific needs. Their positioning and advertising campaigns are more able to reflect local insights than international brands which have to satisfy very different customers in the world and thus often represent the largest common denominator in products and marketing campaigns. Then, pricing strategies for local brands is more flexible too while international brands “must remain within a pricing corridor” (Schuilung and Kapferer, 2004, p.101). Besides, a local brand is able to respond to both local and international competition while international brands usually follow regional or global strategies. Afterwards, an international portfolio is harder to manage: “This

was illustrated in 1998 by the example of Coca-Cola in Belgium. Some consumers became sick after drinking a particular batch of the product. The news circulated quickly and globally, and it had a negative impact on Coca-Cola's brand image" (Schuiling and Kapferer, 2004, p.101). Thus, it is good for a company to have local brands in order to lower the risks. Nevertheless, local brands, due to lower economies of scale, may not bring significant profits.

II.6.Consumer Culture Theory

CCT has contributed to consumer research by focusing on the cultural dimensions of consumption. Consumer culture theory studies the sociocultural, experiential, symbolic, and ideological aspects of consumption (Arnould & Thompson, 2005, p.868). It is not a unified theory. CCT talks about culture in a more complex way than the common idea of homogenization in a globalized world. Indeed, CCT explores "the heterogeneous distribution of meanings and the multiplicity of overlapping cultural groupings that exist within the broader sociohistoric frame of globalization and market capitalism" (Arnould & Thompson, 2005, p.869). Consumer culture describes a network of global connections through which local cultures are more and more penetrated by global ideals and products. The expression "consumer culture" builds a concept of an interconnected system of images, texts, and objects which are produced commercially and that groups use to orient their lives and to make collective sense of their environment. (Arnould & Thompson, 2005, p.869). In other words, as assessed by Holt (2002, p.72), "Consumer culture is an irresistible form of cultural authority that generates a limited set of identities accessed through commodities. Firms act as cultural engineers that specify the identities and pleasures that can be accessed only through their brands". Consumer culture theory says that one resource used by consumers to construct their identities is the cultural capital perceived in global brands (Özsomer & Altaras, 2008, p.7). According to Bourdieu (1979), an individual has three types of capital: the economic capital, which means financial resources; the social capital, which is composed of networks, affiliations, relationships; and cultural capital. Cultural capital is defined as the culturally valued taste and consumption habits. Art and education are for instance part of this cultural capital. In other words, cultural capital is a set of distinctive tastes and skills, knowledge, and practices possessed by people. In CCT, cultural capital is used not to define an individual but a brand.

According to Gouez, alimentation is at the heart of the collective identities formation process (2007, p. 15). A totem-drink is a beverage of reference for a social group, a nation. A

totem-drink is considered as a good that is specific to the group. In *Mythologies*, Barthes talks about wine as a totem-drink for the French Nation (Gouez, 2007, p.15).

II.7. Consumer Resistance and Socially Responsible Consumption

Consumers protest punctually and collectively. But they also resist in silence, isolated, and sometimes during a long period of time, which implies even more negative consequences for companies. This phenomenon is called consumer resistance and has become a stream of research (Roux, 2007, p.59). It is of interest for marketers since it enables to understand the origin of consumers' critics. For instance, some rebel consumers decide to consume less in order to find a better way of life, and others are skeptic to consume products perceived as unethical. We can talk about a resistance continuum going from simple avoidance behavior to active rebellion, such as complaining or boycotting (Fournier, 1998, p.88).

Holt (2002, p.72) distinguishes two main kinds of consumer resistance that explain how people can emancipate themselves from the market's cultural authority. The first kind is the reflexive resistance, which consists for the consumer in filtering out marketing's influence. Indeed, Ozanne and Murray (1995, p.517) call "reflexively defiant consumer" a consumer who is able to reflect on marketing works and can use this critical mind to challenge the code in his consumption. The consumption code is the set of cultural meanings that marketers include in commodities (Baudrillard, 1998). The other kind of consumer resistance evoked by Holt (2002, p.72) is the creative resistance which consists for consumers to be cultural producers. In the market system, consumers are supposed to be passive and marketers are those who dominate social life. But, consumers are more and more eroding marketers' powers thanks to micro-emancipatory practices. The market becomes heterogeneous due to the variety of self-productive consumption habits and practices (Firat and Venkatesh, 1995, p.255). Details about the growing Socially Responsible Consumption are given below. Also, we can observe that brands have been under attack by some countercultural movements during the last decade (Holt, 2002, p.70). Contrary to the modern consumer culture which principle was to accept brands' cultural authority, the current postmodern consumer culture, appeared in the 1960's, consists in building a personal sovereignty through brands (Holt, 2002, p.82). The postmodern branding paradigm emerged with this postmodern consumer culture. Holt presents four postmodern branding techniques that are based on the idea that brands are authentic cultural resources. The first technique is a campaign based on "ironic, reflexive brand persona", which consists in ads distanced from persuasion attempts. The

second technique is “coat tailing on cultural epicenters”, which consists in building relationships with epicenters such as art, fashion, or sport communities and ethnic subcultures. The third technique is “life world emplacement”, which consists in building brands’ value on disinterested everyday life situations far from the commercial world. The fourth technique is stealth branding, which consists for the brand to have a cool image (Holt, 2002, p.84-85). Antibranding sentiments we observed during the last decade are due to contradictions in these postmodern branding techniques. The first contradiction is the “ironic distance compressed”, which means that, since irony was becoming very common and becoming a cliché, it is not so efficient anymore. The second contradiction is the “sponsored society”, which means that stealth branding efforts are so numerous nowadays that they are more and more criticized. The third contradiction is the “authenticity extinction”, which means that texts considered as authentic are starting to be scarce. The fourth contradiction is “peeling away the brand veneer”, which means consumers take into account the gap between the brand’s exposed ideals and the real corporate activities. The fifth contradiction is the “sovereignty inflation”, which means that consumers have not enough free time to absorb a so large set of fashions, tourist experiences, cultural texts... Due to these contradictions, Holt thinks a new post-postmodern branding paradigm will rise and will be based on the idea that brands as citizen-artists (2002, p.87).

The best illustration of today’s consumer resistance is the growing socially responsible consumption trend which is in fact a soft synonym of consumer resistance. Today’s society is characterized by a growing realization of ethical and social issues, including the environment. This social movement affects many businesses which embark on social projects concerning the environment, labor conditions or animal protection for instance (François-Lecompte and Valette-Florence, 2006, p.67). For these actions to be efficient, consumers need to support them. A study by Loureiro (2002, p.203) showed that consumers are in favor of ethical products and are ready to pay a price premium for this purchase. Nevertheless, the market share of ethical brands remain weak (François-Lecompte and Valette-Florence, 2006, p.68) and consumers often act in a non-ethical way for instance buying counterfeit products (Eckhardt, Devinney, and Belk, 2010, p.426). The socially responsible consumers are people who consider the social consequences of their consumption and who use their purchasing power to influence society. They “act beyond their own interests and pay attention to the physical environment and/or people groups (employees, underprivileged sections of the population, etc” (François-Lecompte and Valette-Florence, 2006, p.68). The socially responsible consumption can take various forms. It can take the form of avoidance behavior,

for instance if the consumer refuses to buy a product that is harmful for the environment (Sen and Bhattacharya, 2001, p.226). For Bourdieu (1979), aversion is a form of consumer resistance to goods. Aversion corresponds to distastes. Distastes contrast with tastes, which represent preferences for goods. In fact, tastes are affirmed by the refusal of other tastes. There are several product or brand criteria that can motivate the buying of a product and thus the refusal of a product, for instance: the inherent aspect of product (taste), the symbolic aspect of the product (a high end product), the packaging or container practical aspects... (Hogg & Savolainen, 1997). The socially responsible consumption can also be activism through boycott of irresponsible companies. Another form of socially responsible consumption is approach behavior, for instance through the purchase and the promotion of ethical products. No matter the form, these actions foster companies to act differently (Sen and Bhattacharya, 2001, p.226). According to François-Lecompte and Valette-Florence (2006, p.72-73), the socially responsible consumption has five dimensions. The first one is “behavior of organizations” means refusing to buy products from irresponsible companies. The dimension “purchase of product-share” refers to the purchase of products of which benefits are given to a particular cause/organization. The dimension “small businesses” refers to the will of helping small businesses. The dimension “product’s origin” corresponds to the idea of favoring the purchase of products made locally. Finally, the dimension “consumption’s volume” refers to the reduction of personal consumption. It has to be noticed that consumers are more willing to be socially responsible when they believe their actions have a real impact, for instance on the economy, the environment, etc (Shaw, 2006, p.1049). According to Carrigan and Attalla (2001, p.560), most of consumers think it is important that companies act responsibly but refuse to assume the consequences such as higher price or loss of time (2001, p.560). According to Eckhardt, Devinney, and Belk (2010, p. 427), consumers are not ready to lose their comfort for social causes. Mainly, the argument of economic rationalization is based on a cost-benefits analysis. Consumers think that socially responsible consumption is costly. Price and quality are often considered as more important than ethical characteristics. Also, the perceived efficiency of actions increases the probability of socially responsible consumption (Shaw, 2006, p.1050).

Robert-Demontrond and Joyau have studied the emergence of alternative colas in their article «L'altermondialisme sous sa déclinaison marchande : une étude exploratoire d'offres commerciales entre équité, éthique, ethnicité », “Market applications of Alter-globalization: an exploratory study of commercial offers, between equity, ethics, and ethnicity”. According to them, the emergence of alternative colas is a manifest signal of resistance to the

globalization process (Robert-Demontrond and Joyeau, 2004, p.3). They classify alternative colas in two main categories: an offer based on ethics and an offer that ignores a priori the ethical discourse. There are four kinds of alternative colas based on ethics. The first kind is the fair trade cola (Ekha Cola, Beuk Cola). The second accounts for a communitarian logic (Mecca Cola for instance). Colas which declare political claims form the third kind of colas based on ethics (Mecca Cola that fosters the boycott of the American imperialism and sionism). Finally, some colas reflect a devotional religious act (Mecca Cola, Zam Zam Cola). There are three different kinds of colas corresponding to the offer that ignores a priori the ethical discourse. First, there are the colas which integrate an ethnic dimension (Breizh Cola, Corsica Cola, Ehka Kola, Arab Cola, Turka Kola). Then, there are the colas founded on political claims (Beuk Kola and Ehka Kola distributed in bars that do not distribute multinationals' products, letting no choice for the consumers). Finally, there are the colas based on authenticity instead of modernity (Breizh Cola).

II.8. Regional Cultures, a Specific Marketing Resource

The article entitled "Regional Cultures as a Marketing Resources" (originally in French) written by the French researchers Dion, Rémy, and Sitz, focuses on the regional belonging feelings. In Europe indeed, regional belonging feelings are strong, especially in some regions: being Breton or Corsican in France, being Asturian in Spain, or Flemish in Belgium... These feelings are not new but are re-emerging nowadays. These regional aspirations are not tied to independentist movements but they aim at defending a cultural capital. Regional, National, and Supranational identities co-exist. The authors suggest seven possible marketing actions for regions. The first action is to build a narrative from the region's representations. People having regional belonging feelings can represent this belonging with a "identity check-list". For instance, a Breton would tend to represent elements such as a lighthouse in a storm, a Brittany flag, some food specialties such as crepes or kouign-amann, a traditional costume, a Guy Cotten's brand yellow oilskin, etc (Dion, Rémy, & Sitz, 2010, p.16). This identity check-list is often used by brands to build differentiation axes and communication strategies. Using these elements enable a quick identification of the origin and characteristics of the product. These symbols are easy to use on packaging. This check-list can also be used to tell a story about the brand. For instance, the Brewery Lancelot in Brittany built a brand inspired by historic Breton characters and legends. In some cases, a brand or a product can even become a typical element of the region, such as the Guy Cotten oilskin in Brittany. The second action is

to create a regional atmosphere around the consumer. To do so, it is possible to build a sensorial environment, for instance recalling a smell, a music, a noise, etc, in a commercial (Dion, Rémy, and Sitz, 2010, p.17). The third action is to emphasize the regional treasures, by valorizing traditional recipes, or talking up geographic qualities for wines, etc. It can also consist in sponsoring regional events (Dion, Rémy, and Sitz, 2010, p. 17). The fourth action is to favor the regional exhibitionism, which means to show the pride of belonging to a specific a region in a product. The product is thus becoming a support of pride (Dion, Rémy, and Sitz, 2010, p.18). The fifth action is to position a brand as an alternative to globalization. The regional product would thus appear like a way to resist (even it is only symbolic or passive) to globalization, along with its market standardization and cultural homogenization. For some companies, such as Breizh Cola, the objective is to embezzle the international brands, symbols of the globalization process, in order to build regional brands of resistance (Dion, Rémy, and Sitz, 2010, p.19). The sixth action is to favor the community experience. Some local brands champion local places (bars, restaurants, etc) to favor contact between consumers, some others offer classes to learn about a regional tradition, etc (Dion, Rémy, and Sitz, 2010, p. 20). The seventh action is to emphasize the regional solidarity. Some people buy product to support their region. In this perspective, a collective brand called “Produit en Bretagne”, “Produced in Brittany” has been created. Buying a product labeled “Produit en Bretagne” thus means helping the Breton economy. Some international brands, such as Coca-Cola (visual marketing adaptation in Brittany) or McCain (Chtis Fries in the North), use the regional culture resources in their marketing strategies. But, most of the time, theses resources are used by small and medium companies to become strongly establish on regional markets. Nevertheless, all these actions cannot be taken in every region since the belonging feeling is not strong everywhere. Also, companies should pay attention not to caricaturize regional belonging through folklorization and stigmatization (Dion, Rémy, and Sitz, 2010, p.23).

III. Methodology

A research design is the framework for conducting a research. It gives details about the procedures necessary for obtaining the information needed (Malhotra, 2009, p.70). In this section, the detailed research design of the thesis is formulated: type of research design, type of data used, case study details, etc. As underlined by Mason, a choice of method should reflect an “overall research strategy” (Silverman, 2005a, p.109). Therefore, every reason that led to each choice is exposed. A scheme detailing the research design used in this thesis is

offered at the end of this section (**Figure 5**).

III.1. Exploratory Research Design

First of all, the type of research design chosen for this thesis is the exploratory research. The main objective is to explore or search through a problem or situation in order to provide insights and understanding (Malhotra, 2009, p.72). The findings of exploratory research are considered as tentative or as input for further research. This design has been chosen because it is the design to be used for the purpose of this thesis, which is gaining insights for developing an approach and hypotheses to the problem studied. The aim is not to lead a conclusive research, which would consist in testing hypotheses and examining specific relationships. Thus, the information needed is not precisely defined. The process of this research is flexible and less formal than for a conclusive research (Malhotra, 2009, p.73).

III.2. Secondary Data as Basic Source of Evidence

Secondary data analysis is one of the main methodologies used in exploratory research. Secondary data are those that have already been collected for purposes other than the specific problem of this thesis.

First of all, secondary data have been used in the introduction part in order to set up the context and give a broad view of the market of regional distinctive soft drinks and alternative colas. Secondary data used mainly come from corporate websites, paper or online newspapers and magazines articles. To write the literature review, mainly academic articles have been used, but also some paper books. The computerized databases used for the literature review are JStor, EBSCO, and Google Books. To write the methodology part, paper books from the FGV library have been used. Every source of secondary data is provided in the reference list.

Second, secondary data has been used to build the case study. News articles and corporate websites have been extensively used. As stated by Yin, documentary information is relevant to every case study topic (2003, p.85). Documentation is stable and can be reviewed (this is, however not always the case with internet resources that may evolve with time), thus leading to reliability. It is unobtrusive, which means that it is not created as a result of the case study. It is thus useful to build the context for our findings and to put them into perspective. One strength of documentation is also to be exact, it contains names and details that can bring

strong insights. Also, documents cover many aspects of an issue, which is interesting while considering the context and defining the key elements of analysis. Other advantages of using these secondary data were clear. They were easily accessible, inexpensive, and quickly obtained (Malhotra, 2009, p.100). Moreover it enabled to better define the problem at the beginning of the research and then it helped to interpret primary data more insightfully. These secondary data were in fact the prerequisite to the collection of primary data (Malhotra, 2009, p.101). Nevertheless, some weaknesses of documentation should not be forgotten. These justify the use of at least one other method (like the one chosen in this thesis: the in depth interviews for case study). One disadvantage is that documents can be biased (unknown bias), or for instance deliberately blocked. Another disadvantage of secondary data is that, as it is abundant and very easy to collect, they may not be relevant or accurate. In order to face this issue, quality of these secondary data has been evaluated before being used. Only reliable sources have been used. Data have been compared from different sources. Most updated and reliable (corporate websites, famous magazines' articles, etc) data available have been kept. I used only the data that could bring insights for the subject. Data have also been reconfigured to increase their usefulness (figures created by the author). When possible, data available from an original rather than an acquired source have been preferred (corporate websites instead of articles using the same kind of data). Social networks and readers' comments on newspapers' websites have also been useful all along the analysis. To some extent, they can be considered as secondary data since they help to understand the situation, especially consumer behavior. All the secondary data used are external since no data published by FGV have been used. External data are those that originate from sources outside of the organization for which the research is being conducted (Malhotra, 2009, p.105).

III.3. Qualitative Research as Primary Data

Qualitative research is the major methodology used in exploratory research. Primary data are originated by the researcher in order to address the problem at hand (Malhotra, 2009, p.100). Primary data can be qualitative or quantitative. Since the difference between qualitative and quantitative research is very similar to the distinction between exploratory and conclusive research designs, the primary data used in this thesis are qualitative data. Indeed, the outcome of this research is to develop an initial understanding while the result of a quantitative study is to recommend a final course of action. Basically, qualitative research aims at providing insights and understanding of the problem setting, while quantitative

research aims at quantifying the data through a statistical analysis and at generalizing the results from a sample to the population of interest. A quantitative research is based on a large number of representative cases while this thesis, as a qualitative research, is based on a unique case. Malhotra (2009, p.139) talks about a “small number of non representative cases”. Malhotra (2009, p.139) also says data collection in qualitative research is unstructured while it is structured in quantitative research. The term “unstructured” is misused. Asserting that qualitative research is unstructured is exaggerated. There is no denying that quantitative research is more structured, or better said rigid, via statistical data analysis, than qualitative research. Nevertheless, to a certain extent, data collection in qualitative research is structured (see case study and in-depth interviews methodology), even if data collection in qualitative research is less structured, or better said more flexible, than data collection in quantitative research.

III.4. Case Study as a Qualitative Research Strategy

There are several strategies of inquiry in qualitative research, such as ethnography or narrative research for instance (Creswell, 2009, p. 13). According to Creswell (2009, p.13), the researcher explores in depth an activity, a program, a process, an event, or one or more individual for instance. But we should notice that, as underlined by Yin, citing the topic is way insufficient to define a case study. In the words of Yin (2003, p. 12), a case study is indeed a research strategy per se and has to be considered as distinct from other types of strategies such as the participant-observation or the ethnographic method. First of all, a case study is an “empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident” (Yin, 2003, p.13). The case study method has been chosen for the reason developed by Yin. Indeed, it is because contextual conditions are pertinent for the phenomenon that this methodology has been used. Since local competition is studied, it is clear that the regional context is a key element in understanding the phenomenon. An experiment would have totally cut the phenomenon from its context. A history would have deal with non contemporary events. The study case strategy is really the way to start in order to gain deep insights into the phenomenon. Indeed, a survey would have limited the number of variables and thus questions answered while the aim of this thesis was to discuss with both consumers and managers first. Survey could be used in a second step in order to test our results, as suggested in the conclusion’s suggestions of further research. Two important elements in the definition given

by Yin have been taken into account. First, a case study inquiry relies on various sources of evidence (2003, p.14), and second, it benefits from a prior development of theoretical propositions in order to guide the data collection and its analysis. This is indeed what has been done. A theoretical proposition has been shaped. This proposition is: the Coca-Cola Company reacts to specific local competitors by reshaping its marketing strategy thanks to the inclusion of the apparent main elements of success that helped the local competitors to thrive. Then, there is no denying that, as suggested by Yin, a case study is not a mere data collection tactic, or a simple design feature but a true research strategy. More concretely, a case study involves an intensive examination of the phenomenon of interest (Malhotra, 2009, p.42). A case study as developed by Punch in 1998 consists in “the basic idea that one case (or perhaps a small number of cases) will be studied in detail, using whatever methods seem appropriate. While there may be a variety of specific purposes and research questions, the general objective is to develop as full an understanding of that case as possible” (Silverman, 2005b, p.126).

The five components of a research design developed by Yin have been followed: study’s questions, proposition, unit of analysis, logic linking the data to the proposition, and the criteria for interpreting the findings (2003, p.21). The two research questions have been detailed in the introduction. Then, proposition which is the second component of the research design has been suggested: Coca-Cola walks in the footsteps of Breizh Cola in order to better meet local expectations. The third step is to define the units of analysis. It consists in defining what the case is. The case accounts for a situation of competition. The first unit of analysis is a phenomenon: the preference for Breizh Cola and the related market share gained by this local competitor over the global leader Coca-Cola. Our second unit of analysis is a set of actions: the ones taken by the Coca-Cola Company to face this phenomenon. The fourth component of the research design is linking the data to the proposition. The fifth element is the criteria for interpreting the findings. Here, the idea was to interpret the results from our interviews and secondary data analysis in the light of the existing theory exposed in the literature review.

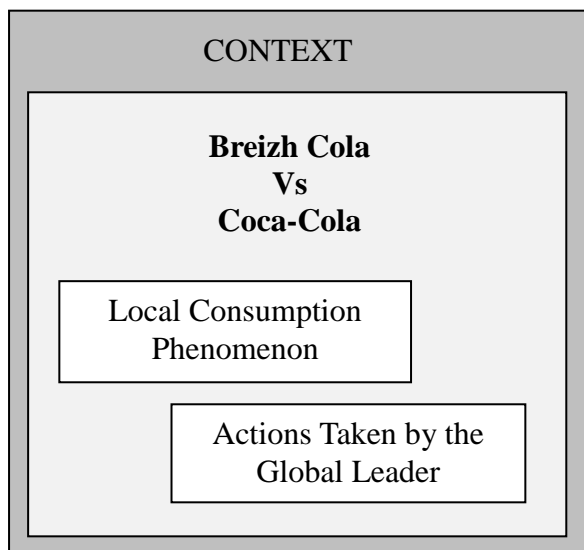
Stake has defined three types of case study (Silverman, 2005b, p.127): the instrumental case study (which goal is not the case itself but generalization), the collective case study (which goal is to investigate a general phenomenon), and the intrinsic case study. This thesis consists in one intrinsic case study since there is no attempt to generalize beyond the case. This does not mean this thesis brings no analysis, but this work aims at gaining insights into specific situations rather than generalizing. It is not a weak position as some people could think about intrinsic cases. The focus of this thesis is limited and thus helps to

bring concise insights and analysis. Data have been obtained from external secondary sources as explained above, and in-depth interviews as explained below.

III.5. Embedded Single-Case Design

This thesis is made of an embedded single-case design. Contrary to the assessment of Yin stating that single-case designs are more vulnerable (Yin, 2003, p.53), a single-case has been chosen to offer a greater focus on the issue thanks to a good source triangulation (consumers, sector's professionals, companies' managers). Embedded case study has been chosen since the case involves two units of analysis (Yin, 2003, p.42), which are a phenomenon and a set of actions (**Figure 3**). Consumers' interviews constitute the base for the study of the first unit of analysis which is the local consumption phenomenon, and the interview of the Coca-Cola manager constitutes the base for the second unit of analysis which is the set of actions taken by the global leader. Nevertheless, every interview has been used for each unit of analysis. Indeed, assertions of each actor enabled to balance the various positions taken during the interviews.

Figure 3. Embedded Single-Case Design



Source: Adapted by the author from Yin (2003, p.42).

III.6. In Depth Interviews as Source of Evidence in the Case Study

Secondary data, also simply called documentation by Yin (2003, p.86) has been the basic source of evidence used in order to both introduce the thesis and build the case study. More details have been given below. Then, in depth interviews have been the main source of evidence in the case study. As assessed by Yin, interviews focus directly on the case study topic and are insightful, which enabled to provide many reasons, in the case Breizh Cola Vs Coca-Cola, for a product preference, or an action taken. Nevertheless, interviews are not easy and the researcher has to be careful. Questions have to be well-constructed in order to prevent bias, and the interviewer should be aware of the possible reflexivity, which means that the interviewee gives what the interviewer wants to hear (Yin, 2003, p.86); hence the necessity to prepare for interviews and to choose a specific method. The interviews are to be considered as guided conversations rather than structured queries. The interview usually has to be fluid. In order to format the questions, one type of interview has been chosen among the three interview alternatives suggested by Patton: the informal conversational interview, the general interview guide approach, and the standardized open-ended interview (2002, p.342). What differs in these different options is to what extent the interview is prepared and the questions determined before it occurs. The general interview guide approach has been chosen. The informal conversational interview was too unstructured for the thesis' purpose. Since the first aim was to understand a consumer's preference for a local product on the one side, and the Coca-Cola Company reactions on the other side, it could not be totally spontaneous. Consumers and managers would probably not have understood what information was asked from them and answers would not have been obtained if the discussion had been too informal. Then, the standardized open-ended interview was too narrow and did not allow any flexibility, while more time would have needed sometimes to change the way the interview would take in order to obtain information or to go deeper into a subject according to a particular answer. An interview guide approach seemed the best option for this thesis. Indeed, an interview guide provides every subject area the interviewer has to explore. The guide is nor totally flexible neither totally rigid. A conversation can thus be shaped according to the answers while following a pretty closed set of subjects. This enabled to have the same basis for each interview, in order to then analyze all the results in the same way. At the same time, it enabled to build and order the questions according to the interviewee, its inclination to talk about every subject...Also, this type of interview was practical because asking questions about several subjects was possible without breaking the flow of the interview. It was easily possible to

choose which information to pursue in greater depth. Indeed, there was no barrier to build transitions and change the order of questions. Thanks to the guide, the best way to use the limited time available was decided in advance. If the interviewee did not evoke what was expected, it was then possible to try to understand why, by formulating more concise questions. At the beginning of each interview, basic principles were exposed to the interviewee by the interviewer. It has been explained that questions may be surprising and in the case the interviewee did not know what to answer or did not see the point of the question, the interviewee could openly say he did not get the question, or had nothing to answer. Thus silence could be analyzed. Silence was indeed a tool to better understand the consumer's choice. For instance, to check if preference for Breizh Cola was based on an anti-globalization position, the question "What do you think about globalization?" was asked (See **Appendix 15** for the interview guide). Basically, the consumers and shoppers' interview guide has been built around the supposed reasons for preferring to buy Breizh Cola, namely: regionalism, local economy development, anti Coca-Cola, anti-Americanization, anti-globalization, relationship during the buying, and taste of course. Besides, each consumer/shopper interview started by basic questions about occupation, city, etc., but also about soft-drink personal consumption patterns in order to better understand each consumer's position. The interviews with sector's professionals were made during the same period as consumers' interview since they also focused on understanding the choice of Breizh Cola. The interview with the Coca-Cola Enterprise distribution network manager was made at the end to counterbalance the consumers' vision. Indeed, the questions have been built according to the consumers' answers in order to get the opinion of Coca-Cola about specific ideas developed by consumers. Of course, specific questions about Coca-Cola marketing strategy in Brittany were also asked. Breizh Cola did not answer to several requests of interview by phone and e-mails. The secretary explained that only Stéphane Kerdodé (co-President of Lancelot brewery and Phare Ouest, the company that launched Breizh Cola) could answer questions for a thesis project but that he was very busy and would answer when available, what he did not do. It has not been able by the secretary to talk to him directly. Breizh Cola's vision has therefore been analyzed through secondary data, mainly their corporate website and news articles. In total, fourteen people have been interviewed: eight consumers/shoppers including six consumers/shoppers having a preference for Breizh Cola and two consumers/shoppers having a preference for Coca-Cola; two shoppers (not consumers) having a preference for Breizh Cola; three sector's professionals including one bar manager commercializing Coca-Cola, one bar owner commercializing Breizh Cola, and one drinks' department supervisor commercializing both

Breizh Cola and Coca-Cola (**Table 1**). Each interview lasted between forty-five minutes and one hour. All interviews have been transcribed (See **Appendices 1 to 14**).

Table 1. Table of Interviewees: Names, Role, Occupation, City of Origin, Current City, Age.

N°	Name	Role	Occupation	Current City, Department, Region	City of Origin, Department, Region	Age
1	Guy	Shopper and Consumer Preference for Breizh Cola	Student, teaching master degree	Brest, Finistère, Brittany	Tréméven, Finistère, Brittany	24
2	Anais	Shopper and Consumer Preference for Breizh Cola	Nurse	Brest, Finistère, Brittany	Quimperlé, Finistère, Brittany	29
3	Christelle	Shopper and Consumer Preference for Breizh Cola	Student in languages, fast- food employee	Noyal-sur-Vilaine, Ille-et-Vilaine, Brittany	Lorient, Morbihan, Brittany	23
4	Axel	Shopper and Consumer Preference for Breizh Cola	Job-seeker	Quimperlé, Finistère, Brittany	Quimperlé, Finistère, Brittany	23
5	Jean-Baptiste	Shopper and Consumer Preference for Breizh Cola	High school student	Nantes, Loire-Atlantique, Pays de la Loire	Paris, Paris, Île-de- France	18
6	Céline	Shopper and Consumer Preference for Breizh Cola	Socio-cultural coordinator	Saint-Brieux, Côtes d'Armor, Brittany	Saint-Brieux, Côtes d'Armor, Brittany	30
7	Sarah	Shopper and Consumer Preference for Coca-Cola	Junior financial analyst	Paris, Paris, Île-de- France	Vannes, Morbihan, Bretagne	28
8	Simon	Shopper and Consumer Preference for Coca-Cola	Town hall employee	Rennes, Ille-et-Vilaine, Brittany	Rennes, Ille-et-Vilaine, Brittany	32
9	Charlène	Shopper Preference for Breizh Cola in	Mathematics teacher	Paris, Paris, Île-de- France	Paris, Paris, Île-de- France	40

		Brittany				
10	Annie	Shopper Preference for Breizh Cola	Doctor	Clohars-Carnoët Finistère, Brittany	Clohars-Carnoët Finistère, Brittany	57
11	Pierre	Sector's Professional	Bar Manager at L'Aethernam, Rennes	Rennes, Ile-et-Vilaine, Brittany	Quimperlé, Finistère, Brittany	25
12	Jacques	Sector's Professional	Le Surcouf Bar Owner, Quimperlé	Quimperlé, Finistère, Brittany	Quimperlé, Finistère, Brittany	39
13	Pierre- François	Sector's Professional	Drinks' Department Supervisor at Intermarché, Lorient	Lorient, Morbihan, Brittany	N/A	28
14	Arnaud Jobard	Coca-Cola Enterprise Manager	Coca-Cola Enterprise Distribution Network Manager	Paris, Paris, Île-de- France	N /A	N/A

Source: created by the author.

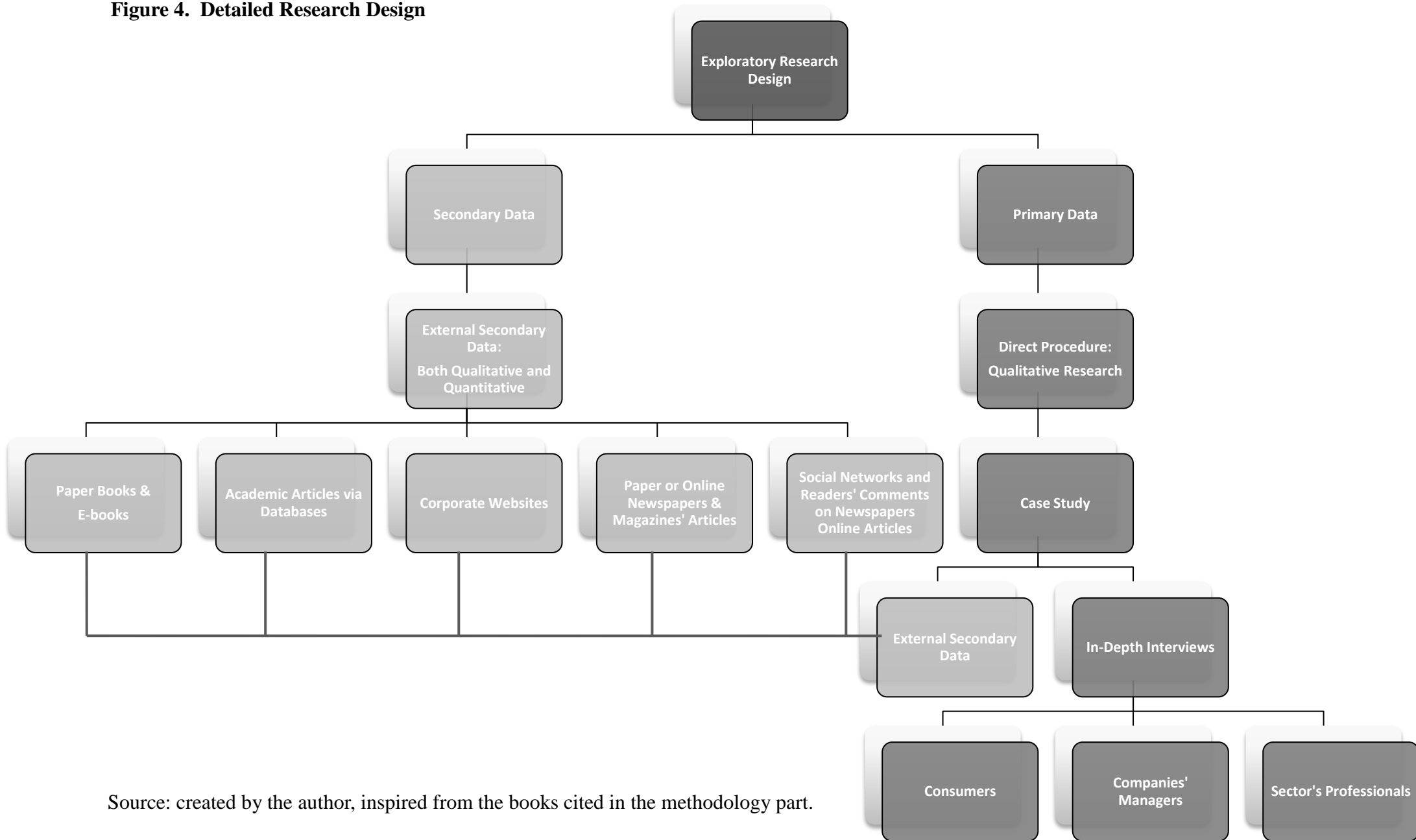
III.7. Worldview

Cresswell defines a worldview as a “general orientation about the world and the nature of research that a researcher holds” (2009, p.6). The type of beliefs held by researchers lead to embrace a certain type of research, either qualitative, quantitative or mixed method. Creswell discusses four different worldview, which are postpositivism, constructivism, advocacy/participatory, and pragmatism. This research is based on a pragmatist worldview. Above all, it is pragmatic because this thesis is real-world practice oriented. Also, as done by pragmatists, this work studies consequences of actions. Indeed, the reactions of Coca-Cola while facing a specific kind of local competition are discussed. The practical consequences of a market trend are thus studied.

III.8. The Issue of Validity

To establish the quality of this research, its validity has been checked (Yin, 2003, p.34). Construct validity has been induced by the use of multiple sources of evidence for data collection. External validity is not complete since this thesis does not aim at generalizing the results. As explained before, the objective is the exploration of a current phenomenon. Nevertheless, the results brought in this study will help to identify other cases that could be comparable to the ones already explored. Finally, reliability has also been achieved. Indeed, if another researcher follows the same steps to do the same research, he should arrive at the same findings (Yin, 2003, p.37). In order to enable this process and thus to minimize the biases and errors, all the procedures followed to build these case study has been described. Besides, the documentation used is available to anyone who would like to check the sources. Every interview is reported in appendices (See **Appendices 1 to 14**). Also, a detailed references’ list is available and every text is consultable on the internet (databases, websites) or at the FGV library. Furthermore, since internet sources vary in quality and reliability (Hancock, & Algozzine, 2006, p.51), each piece of information has been treated in accordance with its status. For instance, a consumer post on Facebook has not been interpreted as if it was a consumer insights’ conclusion published in a market study from a university database. As suggested by Clark in 1967, several questions have been considered each time a document was used, such as: How did the document become available? Who created the document and with what intention (potential bias)? Can the information of one document be checked with another source of information? (Hancock, & Algozzine, 2006, p.53).

Figure 4. Detailed Research Design



Source: created by the author, inspired from the books cited in the methodology part.

IV. Results

IV.1. Breizh Cola in Brittany: an Overview

Brittany is a administrative and historic region located at the very West of France. It stretches over 300 Km. The region is divided in four departments, namely Côtes d'Armor, Finistère, Ille-et-Vilaine, Morbihan. Loire-Atlantique is an historic department but not a current administrative department of Brittany (See **Exhibit 22** for localization of Brittany in France and Europe and **Exhibit 23** for Brittany departments). Nowadays, Loire-Atlantique is part of the region Pays de Loire. There are 4,5 Million inhabitants in Brittany and Loire-Atlantique. Over 1 268 towns, 16 account for more than 15 000 inhabitants. However, population remains more rural than the national average (Tourisme Bretagne, 2011).

Brittany is the French region where the soft drinks consumption is the lowest. In France, Coca-Cola reaches its worse results in Brittany (Botta, 2011; Arnaud Jobard, Coca-Cola Entreprise). On the cola segment, Coca-Cola has a 78% market share in Brittany while it reaches 83% in total in France (Botta, 2011).

Breizh means Brittany in the Breton regional language. Breizh Cola has been launched in 2002 (Martel and Moreau, 2009) by Stéphane Kerdodé and Eric Ollive, employees of the Brasserie Lancelot. The company Phare Ouest was created especially to launch the product with the help of Bernard Lancelot, director of the brewery from 1989 to 2004. Phare Ouest produces the Limonade Morgane and Breizh Cola. In 2004, Stéphane Kerdodé and Eric Ollive took over the brewery. The Lancelot Brewery offers Breton beers inspired from Breton legend and historic characters (See **Exhibit 24**). In 2010, the two companies' total sales reached 15 million Euros, equally divided between beers on the one hand, and cola and lemonade on the other hand. Phare Ouest and Brasserie Lancelot which is now Breizh Cola distributor employ the equivalent of 33 full time employees. Breizh Cola has a 3% market share in the Great West which corresponds to four French regions: Brittany, Basse-Normandie, Pays de la Loire, Centre (See **Exhibit 25** for French regions). This is twice than Pepsi. In Brittany itself, Breizh Cola achieves almost a 10% market share (Botta, 2011). Breizh Cola is a bigger competitor than Pepsi and private label brands together (Martel and Moreau, 2009).

Breizh Cola exists in various formats: plastic bottles of 33cl and 1,5L, glass bottles of 33cl, 75 cl, 100cl. The line is composed of three cola types which are Breizh Cola, Breizh Cola Hep Sukr, whitout sugar, and Breizh Cola Stévia, with a natural stevia sweetener (See **Exhibit 16 and 26**).

IV.2. Consumers and Shoppers' Preference for Breizh Cola

Consumers, shoppers, and sector's professionals' interviews as well as comments on regional newspapers' websites and pages on Facebook enabled to define the reasons for preferring Breizh Cola. These reasons are not presented by order of importance. They rather overlap.

IV.2.1. An Opportunity to Avoid Coca-Cola: Anti-Americanism and Anti-globalization at Work

Choosing Breizh Cola enables to avoid Coca-Cola. The preference for Breizh Cola is based on aversion which is a form of consumer resistance to goods (Bourdieu, 1979). It is an avoidance behavior, which is a form of socially responsible behavior (Sen and Bhattacharya, 2001, p.226). Preference for Breizh Cola is affirmed by the distaste, the refusal of Coca-Cola (Hogg & Savolainen, 1997). For instance, Guy asserts he does not prefer Breizh Cola "consciously". He says "It's not that I prefer buying Breizh Cola, but I prefer not buying Coca-Cola". According to him "it works not because it's different but because it's opposed to Coca". In the same way, Annie who does not drink colas but buys it for guests asserts "Breizh Cola enables me not to buy Coca-Cola. I am not a big consumer so, it must not bother them so much". Pierre, a bar manager thinks that Breizh Cola enables consumers "not to buy American".

The criterion that motivates consumers no to buy Coca-Cola is not the inherent aspect of the product, for instance the taste (Hogg and Savolainen, 1997). Indeed, the consumer does not boycott Coca-Cola. All consumers interviewed also buy and drink Coca-Cola, especially if there is no Breizh Cola available. Christelle states "In fact I buy Coca-Cola when Breizh Cola is out of stock". Anais assesses "In bars, it depends if they have Coca or Breizh [...] I like Coca Cola. It comes in second position, after Breizh Cola". Also, Charlène who goes for holidays in Brittany buys Coca-Cola in Paris but Breizh Cola in Brittany. Thus, it is rather the symbolic aspect of the product that makes consumers willing to avoid Coca Cola (Hogg and Savolainen, 1997). Various deciding factors have been detected. They are based on anti-Americanism and anti-globalization ideas. It has to be noticed that some arguments overlap and may refer to both anti-Americanism and anti-globalization for instance. These arguments illustrate one of the five elements of socially responsible consumption developed by François-Lecompte and Valette-Florence (2006, p.72-73), which is "behavior of organizations". This

dimension focuses on refusing to buy products from irresponsible companies.

While there were few anti-American comments in the interviews made for the purpose of the thesis, they are quite numerous on the internet, rather on Facebook or on regional newspapers' websites. According to Martin (2007, p.56), anti-Americanism is based on a loss of trust which is mainly based on doubts people have today concerning American sincerity. What is interesting for this thesis is the "perceptions of America as a materialistic, narcissistic society in which the powerful exploit" (Martin, 2007, p.56). Many consumers' opinions support this argument. On Breizh Cola Facebook page, Bernard Le Lous asserts "Even if I don't drink it, I prefer that my friends drink the cola of Brittany, Pepsi and Coca, the Americans only want our money. For sure, I will buy some tomorrow...the Breton one!". In the comments below regional articles concerning Breizh Cola and Coca Cola campaign in Brittany, Reunicbreizh29 writes "Coca Cola must stop invading Brittany. We are fond of Breizh Cola and we will push Coca Cola away from Brittany. Since Breizh Cola exists, the sales of the Americans dropped", Gaelle232 writes "I have doubt concerning the human side of this brand. Profit is its driving force, no matter how to achieve it" (Le Gall, 2010) and Bitoulic asserts "Coca Cola has no new identity to show, it will remain American. Here, in Brittany, the motto is "Drink Breizh Cola". US GO HOME" (Lastennet, 2010). Some anti-American comments have also been observed in the interviews made. Jean Baptiste says about the image he has about Coca Cola "The Americans, so not so good. The Americans invade us with their Coca".

To a lesser extent, Anais states "obesity started in the US, and now it's appearing in France because of soft drinks". This comment is interesting for the link it establishes between Coca-Cola and the US. Obesity is part of the country image French people have of the US. It is a stereotype (Nagashima, 1970, p.68). While one could think that the fact that a soft-drink comes (originally) from the US is positive because the US are the place where famous soft-drinks were born, it is in fact an unfavorable mismatch (Roth and Romeo, 1992) because, nowadays, soft-drinks are perceived as unhealthy. Thus, a soft-drink coming from the US is negatively perceived because of the obesity phenomenon in the US today.

Also, Arri asserts "on this market, one brand is queen due to a permanent hype", thus criticizing marketing methods used by multinationals, especially by Coca-Cola (Le Gall, 2010). Céline states "there is Coca-Cola everywhere, even in desert places" and Anais develops the same idea: "Cola-Cola floods the landscape. They are a bit invasive. In some desert places, there are Coca adverts". Even if these arguments are used against the brand Coca-Cola more than against the US, these statements fit with the argument developed in the

book “In Your Face: How American Marketing Excess Fuels Anti-Americanism” by Johny K. Johansson, explaining that this anti-Americanism is due to “marketing efforts that produced the fast-food nation. They have been the downfall of companies that market internationally and don't bother to be culturally sensitive” (Halpem, 2004). Consumers do not appreciate invasive marketing employed by Coca-Cola and thus develops an anti-Coca-Cola sentiment. These comments concerning Coca-Cola's hype illustrates what Holt (2002, p.72) call the reflexive consumer resistance, which consists for the consumer in filtering out marketing's influence. Indeed, Ozanne and Murray call “reflexively defiant consumer” (1995, p.517) a consumer who is able to reflect on marketing works and can use this critical mind to challenge the code in his consumption.

Most of the consumers interviewed do not have clear ideas about globalization. Most of them could not answer the question “What do you think about globalization” which shows that their thinking is not ideological. For Guy, globalization has “good sides and bad sides” and he admits he does not have a lot to say about it. Christelle even answers “What a question! I am no fond of politics. I don't care. If somebody forces me to think about it, I will think about it but no...The last time I spoke about globalization, it was in preparatory class I think”.

Several consumers who have an opinion acknowledge that globalization has positive aspects. These assertions are in accordance with Scholte's vision of globalization as the spread of transplanetary connections between people, through the fact that people engage physically, linguistically, culturally for instance with people from all over the Earth (Scholte, 2008, p.1478). For instance, Jean-Baptiste asserts, about globalization “It's a good thing. It enables people to discover other cultures, eat asian food for instance. It's nice” and Anais affirms “At the beginning it was positive because, it means openness of countries”.

Beyond these positive aspects of globalization, Anais asserts “But now it's pretty negative because the world is swarming with huge companies. They are everywhere. For me, globalization means profits and money. It doesn't go with sustainability or with respect of workers”. Céline evokes the issue of globalization before the interviewer does: “It's more in opposition to the brand Coca, to what this brand conveys, the idea of globalization and the homogenization of the world”. Then, she states about globalization “I think it's an homogenization of the world, there is a will that everybody does the same things, at the expense of local cultures. They want to rub out particularities to obtain a uniform world culture. For relationships, globalization is important, but I think we can and we should do it without damaging cultures”. In the same way, Annie thinks that globalization is “worrying”

and “goes towards an uniformization of food consumption. Everybody will eat the same, at the expense of the local production and the food culture of each country”. These positions fit with Phare Ouest discourse: “And yet, there is a unique economic model for the entire world. And yet, there is a cultural model that imposes itself upon everyone. And there are products which, by their global spread, tend to a single model of consumption” (Phare Ouest, 2011). Here, globalization is considered as universalization, the process of dispersing diverse objects or experiences to people in every part of the world (Scholte, 2008, p.1476). And, obviously for these consumers, globalization as universalization implies homogenization and a cultural convergence (Scholte, 2008, p.1477).

More clearly, Guy develops anti-capitalist arguments saying about Coca-Cola “It’s a multinational, I don’t want to make them even richer” and stating he has a rather negative image of Coca Cola for anti-capitalist reasons: “It represents...Yes, let’s say the word, it’s capitalism. I don’t want to take part in this”.

Also, if consumers interviewed are usually not against international brands and admit that they usually reflect quality, several of them formulate strong critics about brands. Nevertheless, for food, many consumers trust national or private label brands. Anais criticizes the way products are made, denouncing labor conditions in Asian countries for instance. Annie also underlines that international brands “have their production sites in countries where they take advantage of small producers and the country itself”. Christelle says “I am not anti-brand. But [...] Many brands are not as good as before. There is a decrease in quality. Everything is made to be dropped three years after. It’s the consumption society’s result”. These comments are part of the anti-globalization movement discourse which aims for instance at favoring accountability in policy-making and companies, improving environmental protection, reforming world trade rules in order to benefit the weakest countries and communities (Green and Griffith, 2002, p.50).

Due to all these anti-Coca-Cola statements based on anti-Americanism and anti-globalization, but considering at the same time that consumers do not boycott Coca Cola and usually buy it if they don’t have the opportunity to buy Breizh Cola, it is possible to consider that the purchasing of Breizh Cola brings an opportunity gain. An opportunity cost is “the cost of an alternative that must be forgone in order to pursue a certain action. Put another way, the benefits you could have received by taking an alternative action” (Investopedia, 2011). In order to buy Breizh Cola, the consumer usually forgives the buying of Coca-Cola, but instead of considering this renunciation as a cost, he considers it as a gain since this choice enables him not to give support to a brand he does not share the values with. Breizh Cola is not an

absolute choice but rather what could be called an opportunity or relative choice. This is indeed the idea contained in Breizh Cola Motto: “Le Cola du Phare Ouest”, “The Cola from Phare Ouest”. Phare Ouest means West Lighthouse in French, thus playing with the words, since in France, Far West symbolizes the US, the West wild.

It is also important to notice that all these arguments are not illustrating strong political and ideological commitments. Indeed, most of the consumers interviewed buy other soft drinks brands from market leaders also, and sometimes from the Coca-Cola Company. Also, most of them eat at McDonald’s. Thus, choosing Breizh Cola rather than Coca Cola is symbolic but does not illustrate any anti-American and anti-multinational boycott. For instance, Guy also buys “Schweppes, 7Up, Orangina” and Christelle sometimes buys “Fanta, Sprite, 7Up”. This fits with Stéphane Kerdodé’s intentions. Indeed, Stéphane Kerdodé asserts “The idea is to offer a different choice. We did not copy-paste Coca or Pepsi” but he refuses anti-Americanism, “When my children want to go at McDonald’s, we go” (R. T., 2011). Also, it should be noticed that some people interviewed do not criticize Coca Cola. For instance, Axel states that Coca-Cola exists in every country like McDonald’s and that he considers it as the imperialism of the drink. But he adds “according to me, it’s not a problem”. Besides, many consumers don’t think there is clear americanization of the world. Even if Jean-Baptiste criticizes the Americans, he assesses “For food, there is McDonald’s for sure but there is also Kebab”. Christelle also underlines that Asian food is also very successful and that people eat many different kinds of food.

IV.2.2. The Breton Feeling of Belonging Materialized in Breizh Cola

Consumers like Breizh Cola because it is Breton. It’s a reason in itself.

The interviews emphasize the fact that Bretons are proud to be Breton. To the question “Are you proud to be Breton”, Axel answers “Oh yes, for sure. Almost everybody is proud of his region. And it’s true that in Brittany, we are lucky”. Even Jean Baptiste, who comes from Paris, and has been living in Nantes in Loire-Atlantique, an historic but non-administrative department affirms “We can say yes, even a lot. I think it comes before being French. I say more that I am Breton than French”. Charlène, from Paris, asserts “Well I am not Breton, but my Dad is. So I like to feel like I belong there too, and yes, it does make me proud”. Céline affirms “I am glad I am Breton. There is a festive atmosphere. It’s a beautiful region. The atmosphere is nice, it’s convivial. This conviviality doesn’t exist everywhere”.

According to the interviews, Brittany is one of the regions where people are the most

regionalist. Jean Baptiste thinks that “In Brittany, people have a stronger identity. It’s the same in Corsica. People distance themselves from the others”. For Céline, the success of Breizh Cola is not surprising in Brittany since “there is a regional identity and it’s getting out again nowadays. Bilingual schools are expanding in Brittany. It’s a little region which resists to a huge brand”. For Christelle too, the success is logical: “Yes, we are very chauvinist, very attached to Brittany”. Anais states “Bretons are very proud of their region. The Corsicans also. Bretons consider themselves different. We don’t really like what is coming from elsewhere”. On Breizh Cola Facebook page, Ramin Célia expresses ironically the fact that she feels more Breton than Auvergnate and that this certainly have a consequence on her preference for Breizh Cola while she does not like Auvergnat Cola: “Half Auvergnate half Breton (yes, weird mix), I can affirm that Auvergnat Cola is really disgusting... While Breizh Cola... Yes, it’s true I am way prouder to be Breton than Auvergnate, I am not necessarily neutral” (Facebook, 2011).

The pride of being Breton is materialized by the buying and the consumption of Breizh Cola. Céline clearly expresses this idea by affirming “Breizh Cola is Breton, so I buy it by chauvinism”. Jean-Baptiste says “I like Brittany. If we can buy Breton products, we go for it. It’s better to pay a Breton thing than an American one”. To the question “Why do you prefer Breizh Cola?”, Christelle “It’s Breton, so... I would say that first, it’s for the region”. And to the question “Why is it good for the region?”, she answers that it is good for the economy but also “just because it’s Breton, by chauvinism”. Sarah, who is from Brittany but lives in Paris and often visits Brittany also evokes this reason: “I love Brittany, so when I buy a Breizh Cola, it’s part of the trip”. On Breizh Cola Facebook page, Julien Guilloux suggests “a motto for our coca: You’re Breton or you’re not” (Facebook, 2011), thus showing the clear link between being Breton and choosing Breizh Cola. Pierre, bar manager in Rennes clearly confirms this idea: “In Brittany, we have a strong culture, when you sell something with Brittany on it, it works”. Pierre-François, drinks’ department supervisor also considers the good sales of Breizh Cola as a consequence of the fact that “Bretons like Brittany”.

It is possible to speak about a region-of-origin effect. For sure, there is no product-country/region match (Roth and Romeo, 1992), Brittany is not known for the quality of its soft-drinks but Brittany is loved by Bretons. But, as shown above, Bretons are proud to be Bretons and thus consider that Breton brands are good, as Brittany is. Breizh Cola, as it is based on a regional belonging (Breizh Cola means Brittany) benefits from the good image of the region consumers have. Breizh Cola uses the regional culture as a marketing resource. Indeed, it favors the regional exhibitionism, which means to show the pride of belonging to a

specific a region in a product. It is one of the seven possible marketing actions for regions developed Dion, Rémy, & Sitz (2010, p.18).

Even if Stéphane Kerdoé refuses “anti-Americanism” (“When my children want to go at McDonald’s, we go”, R. T., 2011), Breizh Cola embezzles an international brand, symbol of the globalization, in order to build regional brands of resistance. This is also one of the seven possible marketing actions for regions developed Dion, Rémy, & Sitz (2010, p.19). As claimed by Phare Ouest on Breizh Cola website: “For several years, the awareness has grown about the importance of cultural diversity. Do we not speak, for example, of the importance of saving local languages?” (Phare Ouest, 2011). It is important to notice that this discourse fits with consumers’ pride to be Breton and the will to maintain their differences.

As affirmed by Ger “the intrinsic advantage retained by local corporations is their local identity and culture” (1999, p.65). Indeed, thanks to a focus on the local cultural capital, the Breizh Cola local brand is able to “out-localize”, to a certain extent, the influence of the global player Coca-Cola.

IV.2.3. A Socially Responsible Purchase

More than being only a chauvinist purchase, buying Breizh Cola means fostering the local economy and participating in the environment-friendly consumption movement. Breizh Cola purchase is can thus be considered as a socially responsible purchase. The socially responsible consumers are people who consider the social consequences of their consumption and who use their purchasing power to influence society (François-Lecompte and Valette-Florence, 2006, p.68).

In the comments below *Le Télégramme*’s article “Coca Cola. The company refines its Breton rooting”, Thrasybule asks “Where do the generous dividends of Coca Cola, in Brittany/France or in the US?” (Le Gall, 2010). This questioning shows the interest for the results of the purchase, the destination of profits. Anais states, about international brands: “they don’t have any problem, it’s not very important if I don’t buy them...They don’t need my help”, thus considering that when she buys local product, her choice has a real impact on the economy. These comments emphasize one of the five dimensions of socially responsible consumption developed by François-Lecompte and Valette-Florence (2006, p.72-73), which is the “small businesses” dimension that refers to the will of helping small businesses. Anais indeed buy some products from cooperatives or directly with the producer. She affirms she pays attention to the origin of products she buys. She also buy fair trade products, mainly

basic ones such as rice, tea, sugar, coffee, etc.

Axel thinks buying Breizh Cola is “ethical because it is produced in Brittany. It favors local companies”. Simon, who prefers to buy Coca Cola acknowledges “The only good thing is that the factory is in Brittany, it creates jobs. The rest, I don’t care”. These arguments are consistent with the “product’s origin” dimension which corresponds to the idea of favoring the purchase of products made locally (François-Lecompte and Valette-Florence, 2006, p.72-73).

Green impact is also to be considered to explain the preference for Breizh Cola. Céline buys basic products in cooperatives or directly with the producer and she asserts: “With small producers, we can easily be sure of the way products are made”. This comment gives support to the idea that consumers are more willing to be socially responsible when they believe their actions have a real impact, for instance on economy, environment, etc (Shaw, 2006, p.1049). Christelle also says that if she has the choice, and that products are more or less the same price, she prefers to buy products from the region. For instance, she also buys traditional apple juice. She is sensitive to proximity and likes to know that the product does not come from a very far place. She says “it’s green”. Annie who does not like colas assesses “I don’t like the product, being Coca-Cola or Breizh Cola, but I prefer to buy a product produced locally”. For her, it is good for ecology: “There is less transportation when the product is local”. These positions fit with Phare Ouest discourse: “And in the environmental field, there is no dispute today about the absolute need to maintain diversity (biodiversity) of plant and animal species, the only solution to consider a sustainable development” (Phare Ouest, 2011).

Also, some consumers may consider it helps but does not buy the product with this idea in mind, such as Guy who answers to the question “Do you think you help local economy by buying Breizh Cola?” by “I don’t buy it for that but I think that yes, at the same time, it helps. I think it’s good.”

It has to be noticed that Breizh Cola consumers do not only consume in a socially responsible way. As stated by Carrigan et Attalla (2001, p.560), most of consumers think it is important that companies act responsibly don’t assume the consequences such as higher price or loss of time (2001, p.560). Indeed, as already underlined by Christelle, she buys regional products only if the product is more or less the same price than an international brand. She thus states “if there was a 1 euro difference, I would certainly prefer to buy Coca Cola”. Many Breizh Cola consumers interviewed do not consume fair trade products because of the price and do not go to markets or cooperatives because it takes more time than the supermarket.

IV.2.4. A Good Taste

A product such as a cola could certainly not be successful without a good taste. The taste is an important explanation, or better said a necessary condition that enables Breizh Cola to thrive. For Pierre François, Drinks' Department Supervisor, "the product is fun and good compared to other non Coca-Cola colas". For Jacques, bar owner offering Breizh Cola, "it is a good product, nice packaging, good taste compared to many colas". A consumer who wrote in the comments below *Le Télégramme's* article "Coca Cola. World first ; a special poster in Brittany" expresses well the importance of taste, beyond the fact to be a Breton product: "The Breizh Cola with Stevia is the best cola ever tasted (green cap and tag). And it's not because it is Breizh but clearly because its flavor is unique, slightly sour" (Lastennet, 2010). There are more than 25 pages in favor of Breizh Cola on Facebook. The main one has more than 8000 members. Several others have more than 300 members. Many members write on these several Facebook walls focusing on the good taste of Breizh Cola. For instance, Corentin Magrex says "I never finish a coca-cola can, it's too heavy. However, I don't let a drop of it, it's too good" (Facebook, 2011), Cécile Carceles writes "Because it's the best cola in the world!" and Anna-Louise Rouaud affirms "Simply delicious and way better than Coca Cola". To the question "Why do you prefer breizh Cola", Anais answers that it's because she prefers the taste: "it's sweeter, less bitter, there's no aftertaste". Céline even underlines that "Breizh Cola does not make burp! And it's good, more caramelized". Axel also prefers Breizh Cola's taste because "It's more caramelized".

It has to be noticed that some consumers don't care about the taste, especially Guy who considers that colas have the same taste except the very cheap ones. Also, everybody does not like Breizh Cola's taste, which is clearly different for most of people. Simon affirms "Coca's taste is Coca's taste. Breizh Cola is more caramelized, sweeter, I prefer Coca. I started with the true taste of Coca, I'm fan of the true Coca's taste". Pierre, the bar manager, also uses this expression "true coca": "From my experience, when I worked in Belle-Ile, quite many people were refusing Breizh Cola. We were selling only Breizh Cola and people wanted the true Coca". Coca Cola remains the reference and Christelle notice "we even call "Coca" every cola soft-drink. Even for very cheap brands we say "Coca". And they do everything to make it similar to the true Coca-Cola. It's red...".

IV.2.5. A Successful Product in the Consumer's and Professional's Eye

What plays a role in the preference for Breizh Cola is also the fact that it is seen as a successful business, a good initiative.

People are impressed and happy of Breizh Cola's success. Christelle assesses "I am a bit impressed by what they achieved. They now have a good place in the supermarkets". Sarah, who goes on holidays in Brittany since she is from Vannes, states: "I usually buy a bottle of Breizh just because it's fun to compare and to support their initiative [...] I clearly prefer Coca. I am addicted to the taste. Unfortunately (laugh). Breizh Cola is not bad, but I am really used to the true Coca-Cola. In fact, if I sometimes buy Breizh Cola, it's because it's local and fun, I think they has a good idea, their marketing is quite good. They succeeded to create a good recipe, which is not the case of all these very cheap colas, or the distributors' brands".

Besides, a kind of local pride has to be noticed in the regional press. In *Le Télégramme's* article untitled "Coca Cola. The company refines its Breton rooting" Le Gall, journalist, asserts "Coca Cola is titillated by its smaller rival local Breizh Cola, the giant Coca Cola wants to strengthen its market presence in Brittany, playing on the identity register too", "U.S. giant has a bit of trouble in Brittany". Nevertheless, the journalist recalls that Coca Cola is locally anchored in France with production sites and French suppliers (Le Gall, 2010). The other regional newspaper *Ouest France* shows some pride too in the article "The nice shot of Breizh Cola with stevia" in which the journalist Gentric asserts "Coca Cola was thinking about it for a long time. The Breton hop o' my thumb outstripped it thanks to a soft drink with 70% less sugar" (Gentric, 2010). The professional magazine *Rayon Boissons* is also positive for Breizh Cola. *Rayon Boissons'* titles reveal a kind of respect for the local competitor: "Breizh Cola, the thorn in Coca Cola's foot in Brittany" (Martel and Moreau, 2009), "Breizh Cola snipes on the stevia sweetener before Coca Cola" (Lesurf, March 2010). Nevertheless, *Rayons Boissons* is also moderate and does not criticize Coca Cola since Lesurf states in the article untitled "Coca reply to Breizh Cola" that "Clearly, Coca-Cola has a significant economic impact on the Breton territory. Much more important than its local competitor Breizh Cola, which PET bottles are produced by L'Abeille in Cholet, Maine-et-Loire" (Lesurf, June 2010). Pierre, bar manager selling Coca Cola, does not admire Breizh Cola but acknowledges the idea was good: "It does not impress me that much. In Brittany, we have a strong culture, when you sell something with Brittany on it, it works. But they got the idea for sure. But in the end, it's like Coca-Cola, they use the same methods but at a regional scale".

IV.2.6. Factors of Success Supported by an Efficient Marketing Strategy

As underlined in the datamonitor report on Coca Cola Entreprises, competition with regional and global players is based on pricing, advertising, promotion, product innovation, and brand development (Datamonitor, 2010, p.9). Breizh Cola knows to use these tools. The factors of preference defined above are thus supported by an efficient marketing management.

The interviews show that, for Breizh Cola and Coca-Cola consumers, the cost of the products, which is the price, does not influence their choice. Consumers do not even know which one of Coca-Cola and Breizh Cola is the more expensive. Thus, Guy says “Coca-Cola is around 10 cents more expensive...I think. But...I have to say, I don’t really look at price when I choose”. Anais says “I have no idea. I don’t look at the price to choose this kind of products”. Axel asserts “I think that Coca is a bit more expensive. It’s approximately the same. I don’t look at the price when I buy because I always take Breizh Cola.” and Céline states “I think there is no big difference. Usually I don’t look at the price for this type of product”. Christelle even justifies her choice with the price “as it’s almost the same, I prefer to buy Breizh. If there was a 1 euro difference, I would certainly prefer to buy Coca Cola”. Thus the fact that the price is more or less the same than Coca Cola reinforces the choice of Breizh Cola. Prices have been observed in two supermarkets. At Leclerc supermarket in Rennes, Breizh Cola 1,5L PET bottle is sold 1,22 €, Breizh Cola hep sukr (without sugar) is sold 1,22 €, and Breizh Cola Stevia is sold 1,35 €. Coca Cola 1,5L PET bottle is sold 1,38 €, Coca Cola light is sold 1,43 €, and Coca Cola Zéro is sold 1,39 €. Prices usually vary according to the supermarket, its location and size, but the proportion remains the same. Coca Cola is more expensive than Breizh Cola which gives support to preference for Breixh Cola. As underlined by Schuiling and Kapferer (2004, p.101), pricing strategies for local brands is more flexible too while international brands “must remain within a pricing corridor”.

Also, Breizh Cola has a strong promotion strategy. Breizh Cola is present in festivals but also in soccer teams. Breizh Cola logo is visible on the short of Rennes soccer team and on the shirt of Brest’ team. It is also the main sponsor of Vannes’ team (R. T., 2011). Beyond these partnerships, Pierre-François, Drinks’ Department Supervisor, underlines that “sales increase also because Breizh Cola does more promotion than in the past. Posters of a Breton lighthouse and a Breizh Cola bottle are widespread in bars for instance, which makes the product kind of famous in the region. This illustrates the fact that positioning and advertising campaigns led by local brands are able to reflect local. Also, there is a pack promotion which attracts the customer. Now, Breizh Cola is available in pack of six 1,5L bottles like Coca-Cola

is”. Indeed, during the summer 2010, Phare Ouest launched the pack of 6 Breizh Cola 33 cl and 1,5L bottles (Moreau, 2009).

Besides, Breizh Cola innovates. Stevia is authorized in France since September 2009. Phare Ouest launched Breizh Cola Stévia in March 2010, thus creating the first cola with stevia (Lesurf, March 2010). However, Coca-Cola was the first one to launch a fruit soft-drink with stevia. Fanta Still was launched in 2008 but Fanta Still with stevia was launched in January 2010 (Moreau, 2009). Breizh Cola launched a very differentiated product while launching Breizh Cola Stévia. Indeed, the a big green leaf, the word “Stévia” put forward on the bottle’s tag as well as the green cap breaks away from the classic red cola tag (See **Exhibit 26**). Stéphane Kerdodé asserts “We do not need a 15 floors’ building with 15000 persons by floor to be efficient. We can observe and innovate too” (R. T., 2011). According to Arnaud Jobard, Coca-Cola Entreprise has tasted Breizh Cola Stévia but “the problem with stevia is that there is not enough of it. Another problem is that it has a taste. It changes the taste of cola”. Besides, “that’s why it is a Company’s subject; it has to do with the recipe”.

Important investments are planned for 2011. Brasserie Lancelot and Phare Ouest decided to invest from 2,5 to 3 million euros in order to increase production capacities. 1 million euro will be dedicated to the brewery and 1,5 to the soft drink activity (M.D., 2011). Today, the headoffice is located in Le Roc St André in the Morbihan Breton departement. Until now, Breizh Cola has been bottled in Cholet, in the Pays de Loire region, by the company L’Abeille. Due to the new investments, Breizh Cola will soon be bottled and produced in Domagné, in the Breton Ille-et-Villaine department. Breizh Cola could thus affirm it is “made in Brittany” (M.E., 2011). Indeed, the cider company CCLF Loic Raison (Agrial Group) and Phare Ouest invest together in a new PET line for soft-drinks and cider on the CCLF site in Domagné. Besides, an extension of 300m² will be dedicated to Phare Ouest syrups. It is an industrial partnership without capital link between the two companies. The existing Phare Ouest Production site in Ploenour Lanvern, in the Finistère department will be dedicated to production in glass bottles and barrels (M.D., 2011).

Also, it should not be forgotten that, contrary to many other regional colas, Breizh Cola benefits from a large population of 4,5 million inhabitants including Loire-Atlantique, which corresponds to a country like Ireland (Martel and Moreau, 2009). This is an extrinsic factor that benefits Breizh Cola sales.

IV.3. Coca-Cola's Specific Actions in Brittany

IV.3.1. A Campaign based on Local Graphics and Partnerships

In 2008, Coca-Cola Entreprise reinforced its presence in Brittany with additional sales representatives to target minimarkets, since Breizh Cola is successful in corner shops (Martel and Moreau, 2009). Since 2009, a specific communication campaign was launched by Coca-Cola in Brittany. The campaign is based on a graphic adaptation and on a key partnership with the association of Lifesavers.

Stéphane Lehoux, the former Coca-Cola manager for Brittany, who now works in Paris, got the idea of “bretonizing” the brand. In order to boost its sales in Brittany, Coca-Cola has customized its communication with Brittany regional symbols. According to Botta (2011), it is not a mere wink to Brittany, but a true revolution. Indeed, it is the first time that the Atlanta marketing team allows a region move away from the communication chart which normally remains the same all over the world. No additional budget was given. The Brittany managers had to do with the classic budget. Stéphane Lehoux spent 25% of the annual budget on this customized campaign. The graphic adaptation is based on regional symbols: the Breton black and white flag which is always present in music festivals for instance, but also on souvenirs. Other key Breton elements are observed: a traditional Breton hat, windsurfers, the celtic Triskel symbol, a lighthouse. The motto “Open happiness” becomes “Digor al levez” (See **Exhibits 27, 28, 29**). The sea is very visible on the posters thanks to the waves. For all consumers interviewed, Brittany is symbolized by the sea and some consumers evoke the Breton flag and the hermine, which is also on the poster. Coca-Cola thus chose to build a narrative from the region's representations. As assessed by Dion, Rémy, and Sitz, (2010, p. 16), people having regional belonging feelings can represent this belonging with a “identity check-list” which for a Breton can contain elements such as a lighthouse in a storm, a Brittany flag, etc. Coca-Cola thus seeks a regional identification, or better said “anchorage” as underlined by Arnaud Jobard,

This graphic adaptation is the support for an important partnership between Coca-Cola Entreprise and the SNSM, the National Society of LifeSavers. Since 2009, the campaign aims at increasing the interest for the organization, especially at recruiting young lifesavers. It also aims at raising funds for buying dinghies in order to train lifesavers (SNSM, 2009). Thus, all posters include the SNSM logo, and many of them are dedicated to the partnership. For instance, during the summer 2011, people will be able to download a phone wallpaper by

sending a text message and 1 euro will be given to the SNSM (SNSM, 2011). Coca-Cola thus offers to Bretons the opportunity to be a socially responsible consumers. According to François-Lecompte and Valette-Florence, the socially responsible consumption has five dimensions. In this case, Coca-Cola wants to focus on the “purchase of product-share” dimension which refers to the purchase of products which benefits are given to a particular cause/organization (2006, p.72-73).

Once the new communication created, the campaign is diffused in supermarkets, bars, restaurants, especially crêperies (since crepes are the regional specialty), through posters, garlands, tables sets, stickers with the inscription « Degemer Mat » which means « Welcome » in Breton (Lesurf, June 2010). For three years, the campaign has been diffused in the points of sales of the four Breton departments Ille-et-Villaine, Morbihan, Côtes-d’Armor, and Finistère. (Lastennet, 2010; Arnaud Jobard, Coca-Cola Entreprise).

Also, for the first time, Coca-Cola was chosen to be the official supplier of the Route du Rhum 2010, a main sailing event from Saint-Malo in Brittany to Pointe-à-Pitre in Guadeloupe. Coca-Cola Entreprise offered a complete recycling operation to Saint-Malo city. Three main systems have been implemented: one recycling shop where in exchange of plastic bottles, people receive a object made of recycled plastic; one electric tricycle with a basket for collecting cans and plastic bottles; a recycled garden with a plastic bottles compactor (BRSA.fr, 2010. See **Exhibit 30**). This event is also a way to show the company is responsible and environmentally-friendly.

Besides, Arnaud Jobard underlines the fact that Coca-Cola is a French company. 95% of the products used come from France. According to him, it’s way more French than some French brands. Coca-Cola Entreprise makes live Coca-Cola collaborators, their families, thanks to factories, logistic platforms in France (See Appendix 14). Indeed, the Great West regional commercial direction employs 137 people of which 60 in Brittany and sales reach 270 million Euros in the Great West (Lesurf, June 2010). Coca-Cola thus has an important impact in the Breton economy. Coca-Cola Entreprise communicates on environmental actions and on the local economic role in the mainstream and professional press. Through institutional communication, Coca-Cola thus offers a “product’s origin” dimension which corresponds to the idea of favoring the purchase of products made locally (in France).

IV.3.2. Coca-Cola's Perception the Breton Market and Breizh Cola, and the Decision of Doing a Specific Campaign in Brittany

Brittany is the region of France where the consumption of soft drinks per capita is the lowest. The market share is lower than in other French regions. Bretons drink more beers, they are not big consumers of soft drinks. For Arnaud Jobard, this campaign is not an anti-Breizh Cola plan. Coca-Cola knows that Breizh Cola is not going to overtake the company. One important issue is that in Brittany, in festivals, celtic festivals for instance, or in Les Vieilles Charrues festival, partnerships are harder because of Breizh Cola. Festivals prefer to partner with Breizh Cola. That's why the Brittany Plan increased the resources to be used in the region, the number of commercials, etc. Also, it's a plan that is concentrated on the summer season because Brittany is touristic. According to Arnaud Jobard, the graphic Breton standards remain "very Coca anyways". "Regional cokes constitute a nice kind of competition" affirmed Jean-Pierre Bagard, Coca-Cola Entreprise President, in 2009 to the magazine *Rayon Boissons* (Martel and Moreau, 2009). According to Stéphane Lehoux, Coca-Cola Manager for the West division, competition from Breizh Cola is not annoying but salutary. The presence of the local competitor brought new consumers since some people who did not drink Coca Cola now drink it. Besides, the space dedicated to colas has grown in supermarkets thanks to Breizh Cola (Le Gall, 2010). On Breizh Cola Facebook page, JB2919 says, about the Coca-Cola campaign in Brittany "I drink cola only since Breizh Cola exists, their advert won't make me buy their product!". This consumer is indeed a new target for Coca Cola since he now consumes a type of drink he did not consume before (Facebook, 2011).

During the interview, Arnaud Jobard, Coca-Cola Entreprise distribution network manager, explained that, contrary to what have been said in the press, it was not so hard to "convince Atlanta" in order to adapt the communication to Brittany. Coca Cola Entreprise has freedom to manage the French market. The Company deals with the media, the consumers, the concentrate formula, the graphic standards, the world partnerships such as the World Cup or the Olympic Games. For instance, the Company deals with the tv commercials. The bottler mixes the concentrate with sugar, water...Coca-Cola Entreprise commercializes the product, deals with the operational marketing in retail outlets. It deals with shoppers which are not necessarily the consumers since it can be the mother who buys Coca-Cola but don't drink it. According to Arnaud Jobard, the bottler has a total freedom on retail outlets, for instance, it can decide to introduce an animator in the supermarket, to offer specific promotions such as

packs. Coca-Cola Enterprise has a total freedom towards Coca-Cola Enterprises in Europe. For sure, Coca-Cola Enterprises try to be coherent, to have the same graphic standards for instance, but it is free to deal with clients in specific ways, to choose promotion periods, etc. In France, there are 7 commercial regions. Each region presents a business plan. The West region thus presents its action plan. Then it is discussed at Coca-Cola Enterprise. Thus, according to Arnaud Jobard, the plan was initiated by the region, then validated with Coca-Cola Enterprise in France. The graphic standards were also validated by the Company in France, and by Atlanta. But it's was not really a validation by Atlanta in the sense of authorization or not, it was more an agreement, a simple validation. For Arnaud Jobard, it's not completely exceptional. In France, there is also, the Mountains' plan for instance, in the Rhône-Alpes region, during the ski season.

The local rooting of Coca-Cola is essential and these actions in Brittany are in continuity with it. Arnaud Jobard underlined the fact that Coca-Cola is a French company. 95% of the products used come from France. According to him, it's way more French than some French brands. Coca-Cola Enterprise makes live Coca-Cola collaborators, their families, thanks to factories, logistic platforms in France (Arnaud Jobard, Appendix 14). Indeed, the Great West regional commercial direction employs 137 people of which 60 in Brittany and sales reach 270 million Euros in the Great West (Lesurf, June 2010). Coca-Cola thus has an important impact in the Breton economy. In France, Coca-Cola Enterprise also communicates on environmental actions in the mainstream and professional press. It's more an institutional kind of communication.

According to Arnaud Jobard, this campaign is not a step towards more regional adaptation, in France and in the world. For him, the aim is to strengthen the local rooting but not to let the graphic standards being modified in all directions. This campaign by Coca-Cola in Brittany goes against the idea developed by Schuiling and Kapferer (2004, p.101) that local brands are able to respond to both local and international competition while international brands need to follow regional or global strategies. Coca-Cola has adopted a glocal marketing strategy. This campaign is in accordance with Heerden and Barter's position (2008, p.44): "marketers should standardize marketing strategy as far as their markets will allow, and once that threshold is reached, localization needs to be considered". The target market must be studied to know which elements might be standardized in order to obtain economies of scale. At the same time, it is sometimes necessary to customize some elements for the strategy to be successful. Local culture needs to be considered in order to build the marketing strategy (Heerden and Barter 2008, p.43). In Brittany, Coca-Cola has taken the specific local feeling of

belonging and pride of the region into account but still remains an international standardized brand.

IV.3.3. Mixed Perceptions of Coca-Cola's Actions in Brittany

On the one side, many people welcome the initiative of Coca-Cola. Jacques, bar owner, thinks it's a good initiative: "We, as restaurants and bar owners in Brittany, we want to have a Breton image, some of us are in touristic region. If Coca-Cola adapts its communication, it's good for businesses who prefer to offer Coca-Cola. They thus have the true taste and the Breton image". Pierre-François, drinks' department supervisor, thinks it's good to give money to associations and that the posters with Breton symbols show Coca-Cola pays attention. He underlines "For sure it's in order to sell more, but that's the aim of every business, including Breizh Cola". Some people commenting on news articles focusing on Breizh Cola Vs Coca-Cola write some words in Breton, thus showing their clear attachment to the local culture. This is the case of Du guitou, Botul, and Morvan56 who welcome the Coca-Cola initiative. Du guitou states "Weird Bretons. They wake up and they feel even more Breton when they are abroad or when foreigners come. The only company showing Breton language is on the freeway is Coca-Cola with a billboard "Degemer mat". The only newspaper who makes a coverage in Breton for the final Guinguamp-Rennes is L'Equipe. Congrats and thanks ! To this Parisian newspaper... And, us, when we will ask Leclerc to put Breton billboards in supermarkets?" and Morvan56 answers "I totally agree with you. When will local brands communicate in Breton too...". Botul says with humor "They should do a commercial in Breton to save the language and I swear I will never drink something else". Claude 29 says "It's a proof of openness from the Americans and we can only welcome it, but I will remain Breizh Cola!!!" (Lastennet, 2010).

On the other side, many consumers do not appreciate that Coca-Cola use Breton symbols and partnerships to sell more. Guy assesses "their attempt to make us buy by putting a triskel on the bottle makes me want to buy even less [...] In fact, I have the feeling they consider us as idiots, not to say worse. It revolts me". Anais develops the same idea "It's not because they put a Breton flag or because they help the lifesavers association that we will buy. It's a kind of pollution I think". Axel also has the same reaction. He even goes further by accusing Coca-Cola of willing to eat the small local actor, and adds "It's astounding, even hurtful that they pick up symbols for such a brand. I think it's too much because Coca-Cola works anyways. They already have the market". For Annie, the problem is the partnership:

“It’s not a good thing, they take advantage of an organization which makes many interesting things but has difficulties to balance its budget”. Christelle sees the campaign as a proof of the fact they feel threatened and notices “When we look at it, we see, above all, that they are many colors and that is the same catch phrase as always”. She confirms she is more sensitive to the Breizh included in the name of the product Breizh Cola, than sensitive to such a Coca-Cola campaign.

Some consumers are more moderate, such as Jean Baptiste who admits that the campaign is well-done: “If I did not already know Breizh, I would be tempted because they make an advert for Brittany, with the hat, the lighthouse, the triskel...”. Céline also has an in-between position: “I don’t care so much about the triskel but building a partnership with a non-profit organization, I am not a big fan. Are they really interested in the fate of people drown or do they only want to have their market share back...”. She thus expresses a doubt on Coca-Cola’s honesty. Simon is also mitigated by saying “if they really help an organization it’s good. For the triskel, I’m not sure it’s efficient”. For Pierre, bar manager, “The only credibility of the poster is the project with the lifesavers”. This is also the opinion of Bernard Gindre, the founder of Ethikentêt, the marketing consultancy that helped Coca-Cola.. According to him, lifesaving is kind of holy in Brittany and the sponsorship with the SNSM makes the communication campaign more credible (Botta, 2011).

IV.3.4. Apparent Encouraging Results for Coca-Cola

According to Coca-Cola managers, the advertising material is less vandalized than before and sales grew up. Between June and end of October 2010, Coca-Cola won 1 market share point in Brittany (Botta, 2011). The operation will continue in 2011 and 2012. Arnaud Jobard asserts that Coca Cola Entreprise measure performance, look at shares’ evolution. But what is hard is that the Brittany Plan is added to what Coca Cola Entreprise do anyways. According to him “it is well perceived by customers and consumers”. Coca-Cola looks at Breizh Cola’s development in Brittany but Breizh Cola remains “an epiphenomenon” according to Arnaud Jobard.

V. Conclusion

V.1. Main Findings and Concluding Remarks

According to Xerfi, “The fact that a non-alcoholic beverage is top of the global list conveys the emotional energy customers may invest into their non-alcoholic beverage of choice.” (Xerfi, 2010, p.61). Breizh Cola also brings emotional energy to Breton consumers. Breizh Cola is a totem-drink in the sense developed by Barthes in *Mythologies* (Gouez, 2007, p 17). It is a beverage of reference for a region.

Preference for Breizh Cola is explained by an opportunity to avoid Coca-Cola due to anti-American and anti-globalization positions even if they are not ideological or clearly affirmed. Another important element is that Breizh Cola is a support of the Breton feeling of belonging. Then, purchasing Breizh Cola is a socially responsible choice based on the support to the local economy and on the positive impact of the environment. Breizh Cola’s success is also due to its taste which consumers like and to the admiration Bretons have for Breizh Cola brand. They welcome the idea and are proud of its success. Also, a good marketing strategy enables Breizh Cola to obtain the preference from consumers, mainly through price (lower than Coca-Cola), promotion (sponsorships and bottles’ packs for instance), innovation (Breizh Cola Stévia).

To increase sales and to be locally anchored, Coca-Cola has followed the footsteps of Breizh Cola and adapted its marketing strategy to the regional market. The adaptation is based on the Breton feeling of belonging through the graphic adaptation but also on the socially responsible consumption trend through the partnership with the SNSM, the participation in environmental-friendly events, and institutional communication about both environmental and economic impact of Coca-Cola in France. Coca-Cola is a follower in the sense that its marketing campaign follows Breizh Cola success factors but it is also an innovator since no global company has made such effort to adapt its strategy to the Breton local pride. Nevertheless, it is important to notice that Breton consumers’ vision of Breizh Cola is way different than Coca-Cola’s. Indeed, while consumers believe Breizh Cola is threatening the global giant, Coca-Cola assesses that Breizh Cola is an epiphenomenon and will never overtake Coca-Cola in Brittany. These actions taken by Coca-Cola in Brittany are not only due to Breizh Cola. This campaign is in accordance with Coca-Cola’s will to be locally anchored in France and more environmental-friendly. Besides, Brittany requires attention because the consumption of soft-drinks is lower than in the other French regions.

Coca-Cola has been ranked the number one brand by Interbrand in the best global brands report for the 11th year in a row (Interbrand, 2010, p.4), and ranked the 6th most valuable brand in the world by Millward Brown Optimor in the Brandz ranking 2011 (p.12). Interbrand assessment gives support to the analysis made in this thesis since it underlines the capacity of adaptation of the brand and the efforts made to be responsible, while still remaining a huge international brand: “Coca-Cola gets almost everything right. Its brand promise of fun, freedom, spirit and refreshment resonates the world over and it excels at keeping the brand fresh and always evolving – all this, while also maintaining the nostalgia that reinforces customers’ deep connection to the brand. *For such a large brand, it operates quickly, flexibly and innovatively, tailoring itself to local markets without tarnishing its legacy.* This includes different flavor profiles in each country and shrewd distribution models in fast-developing world markets (for example, carts in India) [...] *And while its brand may not be perceived as the best corporate citizen, in reality it leads in this area as well, providing US \$305 million through the Coca-Cola Foundation*” (2010, p.14).

In this case, the frontier between nothing and something in the sense of Ritzer is not clear. The analysis goes against the statement of Ritzer that Coca-Cola is nothing. It is not verified that the regional Breizh Cola is something in the sense of Ritzer either. Nothing is “a social form that is generally centrally conceived, controlled, and comparatively devoid of distinctive substantive content” while something is “a social form that is generally indigenously conceived, controlled, and comparatively rich in distinctive substantive content”. Nothing goes with a nonplace, a nonperson, a nonservice while a thing goes with a place, a person, a service (Ritzer, 2003, p.195). Coca-Cola is not totally “nothing” because it is not completely centrally conceived, as observed with the specific campaign in Brittany. Coca-Cola provides distinctive substantive content while participating in environment-friendly events or sponsoring organization such as the SNSM. Then, Breizh Cola is not “something” since it does not necessarily imply “a person” for instance. Breizh Cola consumers usually buy the product in supermarkets which is more similar to a “non-person”, “non-place”, “non-service” than the contrary. To the question “When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?”, Guy answers “It is what I would like. I would like to say it’s true but I know it does not change anything. I buy Breizh Cola in supermarkets, not in little local stores” and Anais distinguishes the purchase of products from a cooperative or a market and the purchase from a supermarket: “when I buy directly with producers, for sure. People are looking for relationships. In supermarkets, not really”.

Finally, this case gives support to Jackson's vision of globalization. He prefers to talk about a globalizing world than a globalized one since cultural transformations are uneven. Products are still not the same worldwide and many producers customize their offer for different markets, as it has been observed for Coca-Cola in Brittany (Jackson, 2004, p.166).

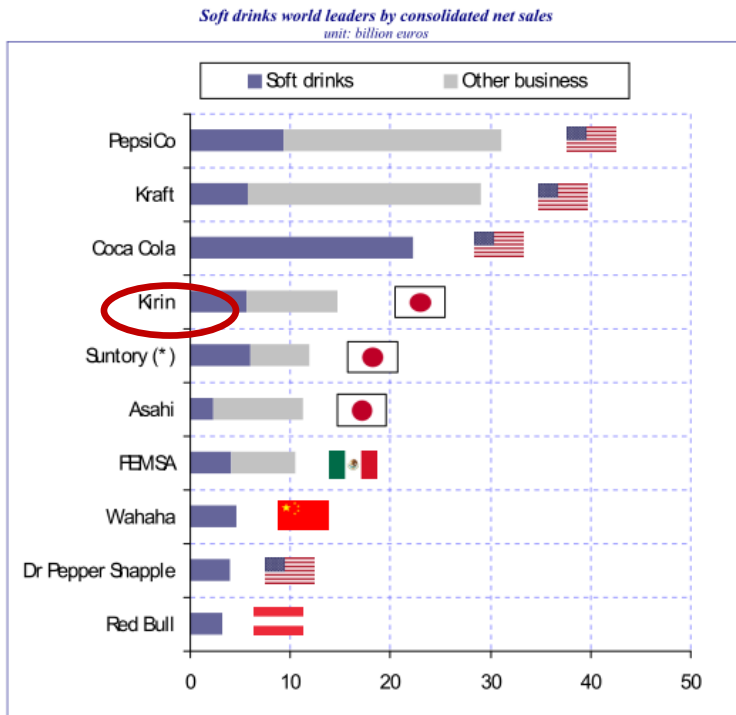
V.2. Limitations and Further Research Suggestions

Limitations need to be noticed. First of all, this thesis is an exploratory research. It does not aim at being conclusive on the subject of marketing adaptation, but rather at bringing strong insights about a specific case of competition between a local alternative player and a global leader in a specific region of France. Since only one case has been studied, external validity is not verified. Also, a convenient sample has been used, which also restricts the conclusive power of this thesis. Besides, as the method has been to directly interview consumers about the reasons of their preference for Breizh Cola, there may be a bias. Consumers may have tried to answer the interviewer's questions even if they did not have a precise idea of what they thought. Moreover, it is not possible to know if consumers really think about the reasons they express while they choose a product. Nevertheless, interviews have also been made with sector's professionals and a Coca-Cola manager in order to balance opinions expressed by consumers.

Thus, some further research suggestions must be provided. First of all, in order to achieve external validity, other cases could be studied since there are more than fifteen regional colas in France. The influence of regional feeling of belonging on alternative purchases could thus be better observed and compared among the various regions. Also, a quantitative analysis of the reasons explaining Breizh Cola's preference could give a better idea of what prevails in the consumer's decision. Nevertheless, this could be difficult since reasons are not necessarily conscious or clear in consumers' mind and, above all, these reasons often overlap. Finally, a detailed study, both qualitative and quantitative, concerning the results of Coca-Cola's campaign in Brittany would enable to evaluate the efficiency of such an adaptation strategy in this specific competitive context.

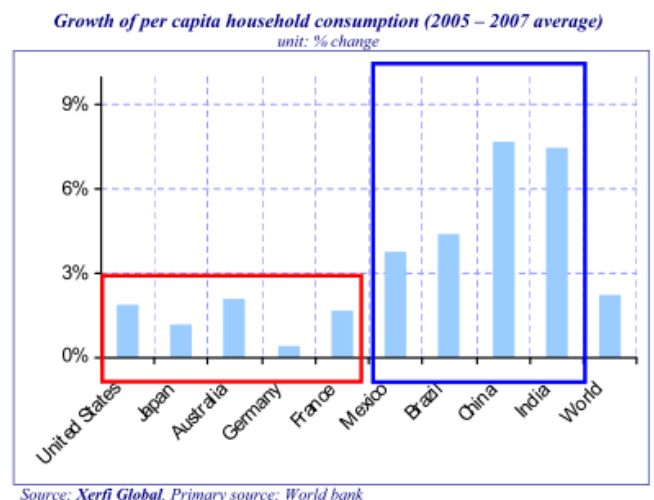
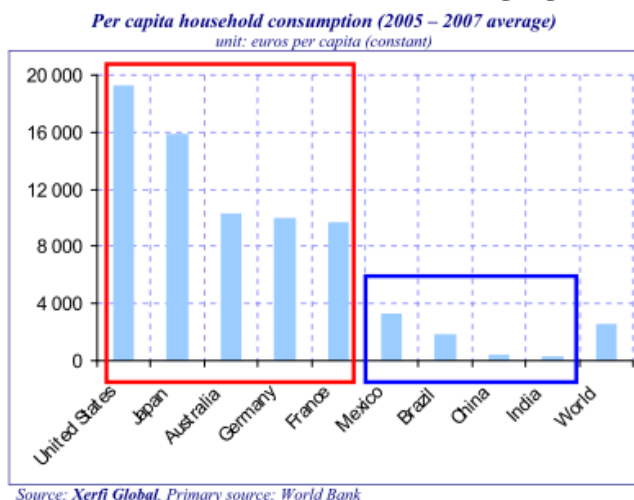
VI. Exhibits

VI.1. Soft drinks world leaders by consolidated net sales in billions euros in 2009



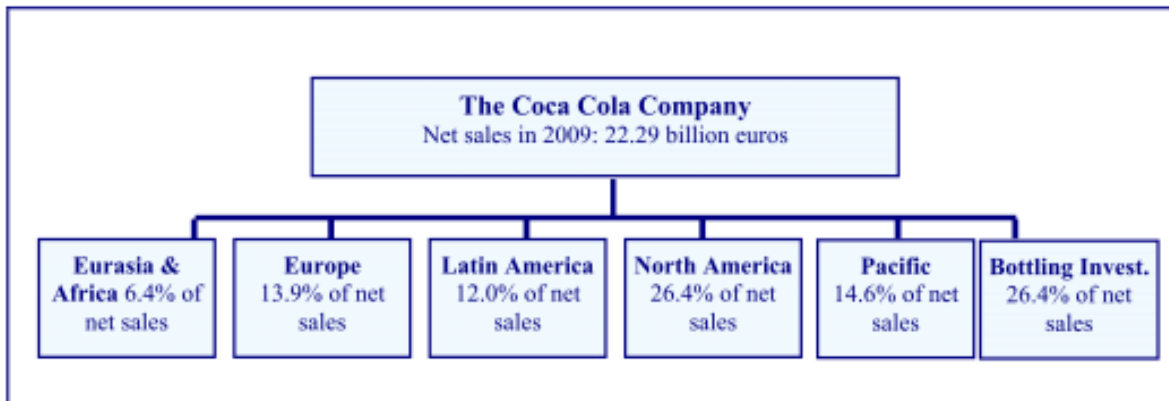
Source : Xerfi Global. (December, 2010). World Soft Drinks Companies. Market Analysis – 2010-2015 Trends – Corporate Strategies. p. 14.

VI.2. Mature markets and high-growth markets



Source : Xerfi Global. (December, 2010). World Soft Drinks Companies. Market Analysis – 2010-2015 Trends – Corporate Strategies. p. 33.

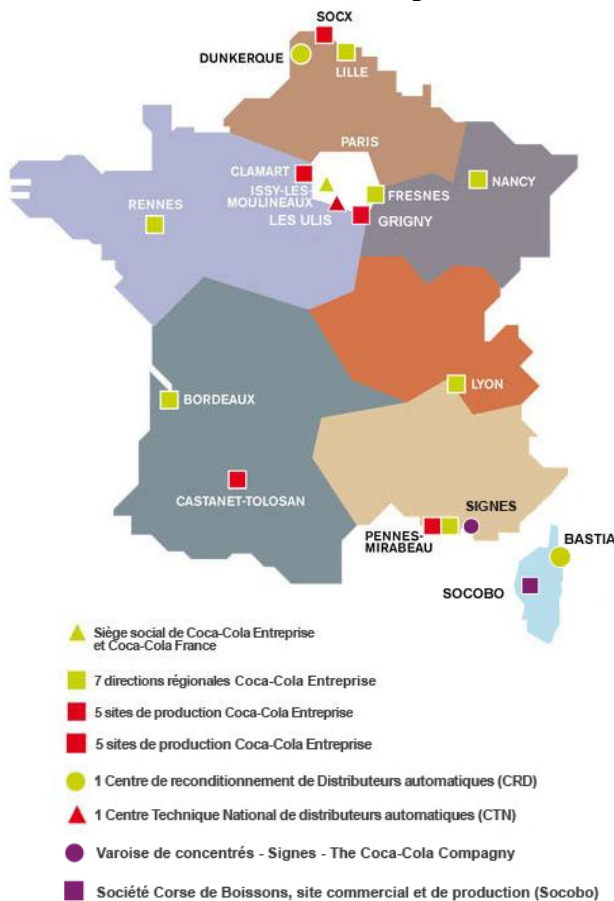
VI.3. The Coca-Cola Company net sales in 2009



Fiscal year ended December, 31st 2009

Source : Xerfi Global. (December, 2010). World Soft Drinks Companies. Market Analysis – 2010-2015 Trends – Corporate Strategies. p. 66.

VI.4. Coca-Cola Entreprise in France



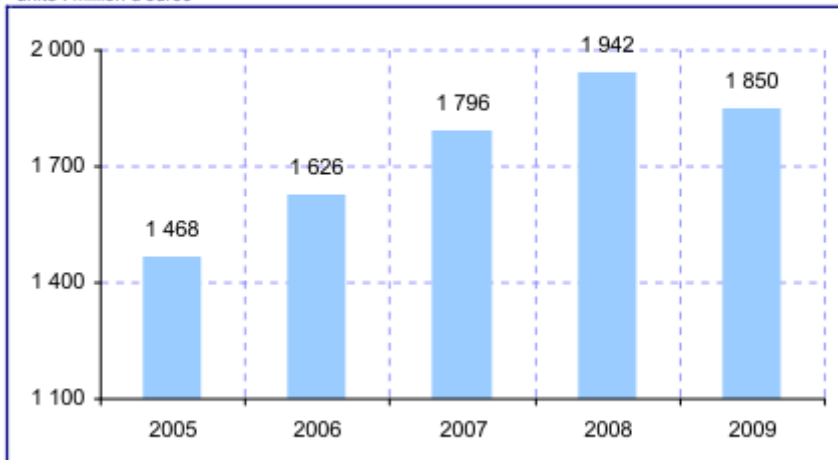
Source: Coca-Cola France. (2011). *Qui sommes-nous ? Production et Qualité.*

<http://cascal.fr/qsn-coca-cola-France-production-qualite.html>

VI.5. Coca-Cola Entreprise's not consolidated sales 2005-2009

Chiffre d'affaires non consolidé de la société Coca Cola Entreprise

unité : million d'euros



Traitement Xerfi (source primaire : Greffes des Tribunaux de Commerce)

Source: Xerfi 700. (November 2010). *Boissons Rafraîchissantes sans Alcools* (BRSA).

VI.6. Kuat, the Coca-Cola guaraná-flavored soft drink



Source: Coca-Cola Brasil. (2011). *Nossas Marcas. Kuat*.

<http://www.cocacolabrazil.com.br/conteudos.asp?item=3&secao=36&conteudo=98>

VI.7. Guaraná Antartica distinctive Brazilian soft drink



Source : Antartica. (2011). *Produtos. Guaraná Antartica.*

<http://www.guaranaantartica.com.br/produtos/guarana-antartica.aspx>

VI.8. Ubuntu, a fair trade cola in the UK



Source: Ubuntu. (2011). *Our Fairtrade Cola.* <http://www.ubuntu-trading.com/our-fairtrade-cola>

VI.9. Bio Cola, Oxfam organic and fair trade cola



Source: Ethik Boisson, 2011. *Cola Bio Oxfam.* <http://www.ethik-boisson.fr/page12.html>

VI.10. Uman Cola, the humanitarian cola sold in France



Source: Uman Cola. (2011). *Produits*. <http://www.umancola.com/produits-projet-humanitaire-56.php>

VI.11. Zam Zam Cola



Source: ZamZam Refreshments. (2011). *ZamZam Cola*. <http://www.zamzamrefreshment.com/cola.html>

VI.12. Arab Cola, a muslim cola born in France



Source: Arab-cola. (2011). *Qui Sommes-Nous ?* <http://www.arab-cola.com/suite.htm>

VI.13. Evoca Cola from the UK



Source: Evoca. (2011). *Evoca Cola*. <http://www.evocadrinks.com/main.html>

VI.14. Future Cola in China



Source: Wahaha. (2011). *Future Cola*. <http://future.en.wahaha.com.cn/softdrinking.shtml>

VI.15. Cola Turka in Turkey.



Source: Ulker. (2011). *Coca Turka*. <http://www.colaturka.com.tr/anasayfa/index.html>

VI.16. Breizh Cola in Brittany



Source: Phare Ouest. (2011). *Breizh Cola*. <http://www.breizhcola.fr/>

VI.17. Corsica Cola



Source: Brasserie Pietra. (2011). *Corsica Cola*.

http://www.brasseriepietra.com/fr/pgs/cola1_fr.htm

VI.18. Elsass Cola in Alsace



Source: Lisbeth. (2011). *Elsass Cola*. <http://www.lisbeth.fr/elsass-cola.html>

VI.19. Vendée Cola in Vendée



Source: Vendée Market. (2011). *Vendée Cola*. <http://vendee-cola.fr/>

VI.20. Fada Cola in Marseille



Source: Midi et Demi. (2011). *Fada Cola*. <http://fadacola.fr/sommaire.html>

VI.21. Meuh Cola



Source: Solibulles. (2011). *Meuh Cola*. http://www.la-meuh.fr/index.php?option=com_content&task=view&id=2&Itemid=5

VI.22. Localization of Brittany in France and in Europe



Source: Tourisme Bretagne. (2011). *Website Welcome Page*. <http://www.tourismebretagne.com/>

VI.23. Brittany: the four current departments, Finistère, Côtes-D'Armor, Morbihan, Ile-et-Villaine; and the fifth historic department of Loire-Atlantique



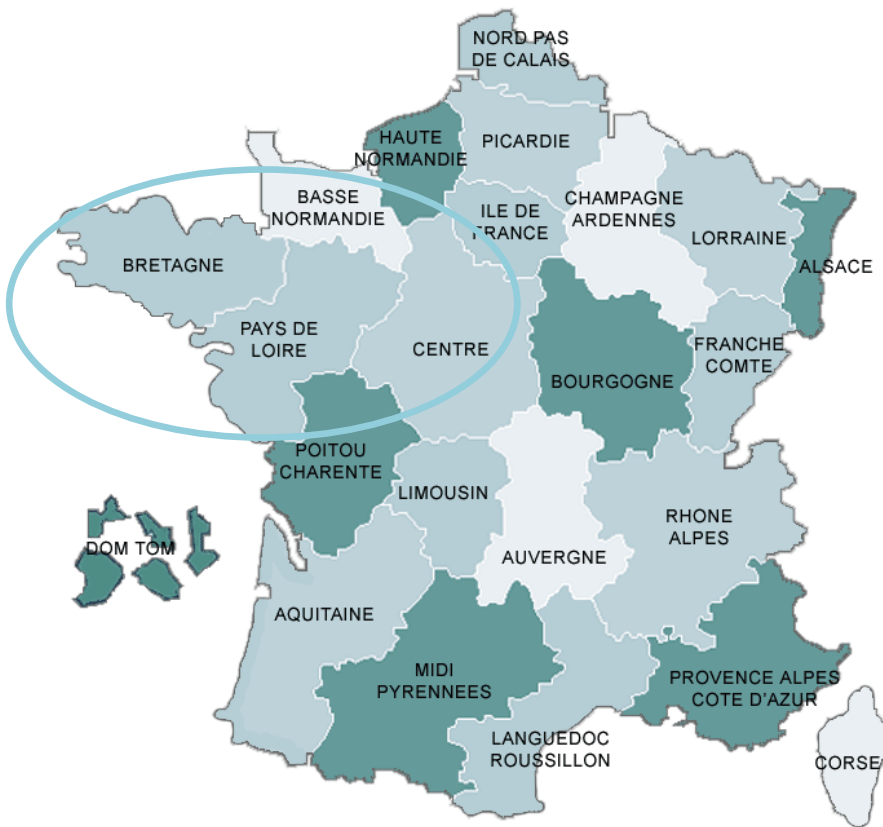
Source: Tourisme Bretagne. (2011). *Website Welcome Page*.
<http://www.tourismebretagne.com/>

VI.24. Lancelot beers inspired by Brittany historic characters and legends



Source: Brasserie Lancelot. (2011). *Bières*. <http://www.brasserie-lancelot.com/>

VI.25. French Regions and the Great West composed of four regions, namely Brittany, Pays de Loire, Basse Normandie, and Centre



Source: Régions CE. (2011). <http://www.regions-ce.com/regions.php>

VI.26. Stéphane Kerdodé and the Breizh Cola Stévia



Source: Le Bagousse, B. (April 9, 2010). Soda à la stévia. Breizh Cola coiffe au poteau Coca-Cola ! *Le Télégramme.com*.

<http://www.letelegramme.com/ig/generales/economie/inter/soda-a-la-stevia-breizh-cola-coiffe-au-poteau-coca-cola-09-04-2010-864468.php>

VI.27. Coca-Cola specific campaign for Brittany 2009



Source: SNSM. (June 2009). *Newsletter Des Nouvelles des Sauveteurs*.
http://www.moteurdexpressions.fr/SNSM/nl_06_2009/

VI.28. Coca-Cola specific campaign for Brittany 2010



Source : Botta, Emmanuel. (Jan., 2011). *En Bretagne, Coca Affiche la Couleur Locale. Management*, pp. 54-55.

VI.29. Coca-Cola specific campaign for Brittany 2011



Source: Arnaud Jobard, Coca-Cola Entreprise (see Interview Appendix 14)

VI.30. Coca-Cola official supplier of the Route du Rhum 2010



Source: BRSA.fr. (November 1, 2010). Coca-Cola fournisseur officiel de la Route du Rhum 2010. *BRSA.fr*. <http://brsa.fr/coca-cola-route-du-rhum-2010-1401/>

VII. Appendices

VII.1. Interview n°1 – Guy, Shopper and Consumer

- *Name*

Guy.

- *Age*

24.

- *City of origin*

Tremeven, Finistère, Brittany

- *Current city*

Brest, Finistère, Brittany

- *Occupation*

Student, Teaching Master

- *Do you often drink soft drinks? Colas?*

Not a lot. It depends...But, yes...Each time I do my groceries, one or two bottles of soft drinks per week.

- *When do you consume soft-drinks? During meals, in front of TV...*

Mainly in front of TV, during the evening, never during meals.

- *Which brands do you buy?*

Mainly Breizh Cola. I also buy Schweppes, 7Up, Orangina, and sometimes distributors' brands...

- *Which one do you buy the more often?*

In the Cocas Category, Breizh Cola for sure. And breizh Cola in general also I would say.

- *Where do you buy/drink Breizh Cola?*

In supermarkets. I don't buy Breizh Cola in the little fair trade stores for instance! I drink it at home, sometimes in bars but I usually prefer to drink beers when I go out!

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

It's Coca-Cola. Coca-Cola is around 10 cents more expensive...I think. But..I have to say, I don't really look at price when I choose...But I think I have read an article about that.

- *Which format of Breizh Cola do you buy?*

1,5 L Plastic Bottle.

- *Never glass bottles?*

No, they are not offered in supermarkets.

- *Why do you prefer Breizh Cola?*

Not consciously...It's not that I prefer buying Breizh Cola, but I prefer not buying Coca-Cola.

- *Why?*

Because it's a multinational, I don't want to make them even richer. And their attempt to make us buy by putting a triskel on the bottle makes me want to buy even less.

- *Are you proud to be Breton?*

Yes, that's it, the resistant spirit! [Laugh]. I feel Breton but I am not necessarily proud to be. I don't claim it.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

Why, it's the case? Yes, I find it bright !

- *Are Bretons more regionalist?*

Since when does Breizh Cola exist?

- *Around 2000.*

The question is Why was it not made before that!

- *What image do you have of Brittany? How would you represent/symbolize it?*

[Hesitation]. The image that the others have about us...[Hesitation].

- *If you had to draw Brittany?*

The sea...Yes, the sea [Hesitation].

- *Do you prefer Breizh Cola's taste?*

No. I find all cocas the same, except the very cheap ones. I don't feel difference between Coca, Pepsi Cola...

- *When there is no Breizh Cola, do you buy Coca-Cola or another brand?*

I buy Coca-Cola. Yes I buy Coca-Cola.

- *Do you like Coca-Cola? The taste.*

Yes.

- *Which image do you have of the brand Coca-Cola?*

[Hesitation].

- *Rather positive, rather negative?*

Rather negative yes.

- *Why?*

It represents... Yes, let's say the word, it's capitalism. I don't want to take part in this.

- *Do you consider Coca-Cola as an American brand or an international one?*

I don't see the United States behind it, it's more international.

- *In general, do you like international brands?*

Yes. You expect quality. You're sure of what you buy. When you buy electronics, or everything... You trust the brand.

- *So, Coca-Cola is quality?*

Yes, for sure, it's good.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

Yes. Coca. Always.

- *Would you like to drink Breizh Cola at McDonald's?*

What's the question? If they offered both, which one would I choose? Or, Do I think they should offer it?

- *Both.*

If they offered both, I would take Breizh Cola. But I would find it fucking stupid to offer it. It's paradoxical. I would be a regional drink that takes part in multinationals. It makes no sense.

- *Do you think you help local economy by buying Breizh Cola?*

I don't buy it for that but I think that yes, at the same time, it helps. I think it's good.

- *Do you consume others Breton products ? Which ones?*

Yes, crepes, cider... Products from the label "Produit en Bretagne", many biscuits, caramels...

- *Do you know other "alternative" colas?*

Che Cola. I know there are others but I don't remember...

- *Where did you discover it?*

A friend's mother had a fair trade little shop. They sold that...

- *Do you drink it?*

I bought it once to taste. It's more funny than something else. It's funny and sad at the same time in fact. To see the Che on a coca bottle. [Laugh].

- *Do you buy fair trade products?*

Very little. Coffee sometimes. Some products.

- *Why?*

Mainly the price. And I usually don't go in the fair trade supermarket's department.

- *What do you think about globalization?*

[Sigh]. Good sides and bad sides...Right now, I don't have many things to say...

- *How do you define globalization?*

The exchanges. An openness on the world. But taken over by multinationals. But I think it created more inequalities than something else.

- *Do you think there is a Americanization of the world? In particular, of food?*

Yes. The lifestyle, the way of thinking is americanized.

- *Really American or rather international?*

True, maybe international, we don't want to copy everything that is coming from America.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

Yes and no. In a sense, that's sure. But, it can lead to the reverse effect and we may want to distance ourselves from all that.

- *That's the case for Breizh Cola?*

Yes, it works not because it's different but because it's opposed to Coca.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

I have this feeling. It is what I would like. I would like to say it's true but I know it does not change anything. I buy Breizh Cola in supermarkets, not in little local stores...

- *As you evoked before, you know that Coca-Cola launched a campaign that specially targets Brittany?*

Yes I do.

- *How did you discover it?*

Through articles. I knew before they did actually implement it. And after I saw it on the street.

- *What do you think about it?*

It annoys me. It makes me want to buy even less.

- *Do you find the poster nice?*

It's nice yes, but not amazing. In fact, I have the feeling they consider us as idiots, not to say worse. It revolts me.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

Yes, it can have an important impact, make the difference with coca-cola even more apparent. It has a true impact on the economy I think, more than I buy a bottle for home.

- *Do you think Breizh Cola should be sold outside Brittany?*

Should it. If I take the issue upside down...It's weird. I think it should stay only in Brittany. It makes no sense out of Brittany, no?

- *Do you often go to McDonalds?*

Max, once in two weeks, one or two times a month. I have a sticker on my car "Yes to butter crepes, no to hamburgers", but I finally go to McDo with it. It annoys me, but...Sometimes, if I buy Coke, it annoys me, but for sure, it's good...

VII.2. Interview n°2 – Anais, Shopper and Consumer

- *Name*

Anais

- *Age*

29.

- *City of origin*

Quimperlé

- *Current city*

Brest

- *Occupation*

Nurse.

- *Do you often drink soft drinks?*

Yes, 1 bottle per week. 2-4 glasses per week.

- *Which ones?*

A bit of everything, Coca, Orangina, lemonade, Perrier, Oasis, Nestera...

- *When do you consume soft-drinks? During meals, in front of TV...*

Around 4 in the afternoon and in the evening. In bars, when I have to drive after.

- *Which one do you buy the more often?*

Coca, well...Breizh Cola, and Oasis.

- *Where do you buy/drink Breizh Cola?*

In supermarkets, I always buy breizh Cola. In bars, it depends if they have Coca or Breizh.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

I have no idea. I don't look at the price to choose this kind of products.

- *Which format of Breizh Cola do you buy?*

33Cl plastic bottles.

- *Never glass bottles?*

No, except in bars.

- *Why do you prefer Breizh Cola?*

Because I am Breton and I buy only Breton products ! Kidding. No, it's because I prefer the taste, it's sweeter, less bitter, there's no aftertaste. And also, I drink it because my mother used to buy it at home. Now I live alone, with my boyfriend, we also buy Breizh Cola.

- *Are you proud to be Breton?*

Yes. Proud I don't know but, yes, it my region of origin. Everybody is proud of his region I think. It's my roots, we are always proud of where we come from...

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

Yes, because Bretons are very proud of their region. The Corsicans also. Bretons consider themselves different. We don't really like what is coming from elsewhere.

- *What image do you have of Brittany? How would you represent/symbolize it?*

The sea. Breizh Cola...no I'm kidding. There is the countryside, the sea...

- *When there is no Breizh Cola, do you buy Coca-Cola or another brand?*

Coca yes, I don't like the others. Supermarkets' brands are way too sweet.

- *Do you like Coca-Cola? The taste.*

I like it. It comes in second position, after Breizh Cola.

- *Which image do you have of the brand Coca-Cola?*

It's a huge firm present everywhere in the world. Santa Claus.

- *Is it rather positive or negative?*

A bit negative, it floods the landscape. They are a bit invasive. In some desert places, there are Coca adverts.

- *Do you consider Coca-Cola as an American brand or an international one?*

An American one.

- *In general, do you like international brands?*

Yes, for clothes. I don't know if I like international brands but I buy them event if I try to limit it...In fact, they don't have any problem, it's no very important if I don't buy them...They don't need my help.

- *So, Coca-Cola is quality?*

No. Sometimes, I don't use a clothe for a longer time than a less famous brand. I buy famous brands for sport but I don't really like the way it is made.

- *What do you mean by "the way it is made"?*

In China, the making. The prices are very high, they make a very high margin compared to what they pay to people. And it's usually no environment-friendly.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

I go very rarely to Mc Domald's. When I go there, I take water.

- *Do you think it would be a good idea to offer Breizh Cola at McDonald's?*

Why not yes. But it would not change the situation that much.

- *Do you think you help local economy by buying Breizh Cola?*

I don't know if I really help but I try to contribute yes, for the development of the local economy.

- *Do you consume others Breton products ? Which ones?*

I don't buy butter Président but butter from cooperatives. I also buy chesses made in Brittany, directly with the producer. I pay attention to the origin of products. I also buy fruits and vegetables from Brittany or not far.

- *Do you know other "alternative" colas?*

There is one in Maghreb I think. I donc really know.

- *Do you drink it?*

I've never tried.

- *Do you buy fair trade products?*

Yes. Coffee, sugar, chocolate, bananas, rice, tea, fruit juices.

- *Where do you buy these products?*

In supermarkets or in organic cooperatives.

- *Do you have an opinion about globalization?*

What do you mean?

- *Do you think it's rather negative or positive?*

At the beginning it was positive because, it means openness of countries...But now it's pretty negative because the world is swarming with huge companies. They are everywhere. For me, globalization means profits and money. It doesn't go with sustainability, or with respect of

workers.

- *Do you think there is a Americanization of the world? In particular, of food?*

Yes. McDonald's and Coca are the best examples. There are everywhere. In Brittany there are McDonald's even in very small towns. Also, obesity started in the US, and now it's appearing in France because of soft drinks...Everybody knows some American brands.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

Cultural differences tend to disappear but people realize it. And today, there is more and more interest for local consumption. I don't know in the world, because I'm not there, but in France, yes. There are many reports on unhealthy eating. There is a desire to become local again. But in Asia or Africa, I don't know, maybe they want to know what we have known...

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

When I buy directly with producers, for sure. People are looking for relationships. In supermarkets, not really. Also, what I like in organic cooperatives, is that we buy for the product not for the packaging, there is less choice, just 2 or 3 brands for a product.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

I heard about it, not a long time ago. But I've never seen it or maybe I did not want to see !

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation)).*

I don't really like. They invades the landscape. We know them, Coca. It's not because they put a Breton flag or because they help they help the lifesavers association that we will buy. It's a kind of pollution I think.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

I think tourists find it funny. In a crêperie, it's part of the game. It's not mandatory but I think it's nice.

- *Do you think Breizh Cola should be sold outside Brittany?*

I don't know, why not. Breizh Cola is way better than the colas with no brands, those of supermarkets...

VII.3. Interview n°3 – Christelle, Shopper and Consumer

- *Name*

Christelle.

- *Age*

23.

- *City of origin*

Lorient

- *Current city*

Noyal sur Vileneu, closed to Rennes, 10-15Km.

- *Occupation*

Student in Languages. McDonald's 10h/week during university periods and 20/week during holidays.

- *Do you often drink soft drinks?*

Quite a lot yes, 3 to 4 glasses per day. Even more when I am at work. I buy around 5 bottles for 3 weeks. And sometimes more.

- *When do you consume soft-drinks?*

At work, at home, when I go out because I drive very often. At friends also. At home, it's not really during meals, I don't really know because I don't eat very regularly. In fact, I drink it all day. I try not to drink it at night. But during the day it's useful because I don't drink coffee.

- *Which brands do you buy?*

Coca, Breizh Cola. In fact I buy Coca-Cola when Breizh Cola is out of stock. It's very exceptional but sometimes I buy Fanta, Sprite, 7Up, artisanal lemonade.

- *Which one do you buy the more often?*

Breizh Cola.

- *Where do you buy/drink Breizh Cola?*

Only in supermarkets. In bars, they often offer Coke. Rennes, sometimes, you feel it's not Brittany.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

Breizh Cola, but almost nothing, 1 or 2 cents, in Rennes. I look at the price but since it's almost the same as Coke, I prefer to buy Breizh. If there was a 1 euro difference, I would certainly prefer to buy Coke. The others are disgusting; they have the taste of medecins.

- *Which format of Breizh Cola do you buy?*

I buy 1.5L bottles when I don't go the university and small bottles of 33cL when I have class.

- *Never glass bottles?*

No, only plastic.

- *Why do you prefer Breizh Cola?*

I don't really know. Before I did not know Breizh Cola. It's Breton, so... And I also prefer the

taste. It's sweeter. I would say that first, it's for the region. Second, for the taste, and third, for the price. Because it's not more expensive than a Coke. If I have the choice, and products are more or less the same price, I prefer to buy products from the region than American ones. I also buy traditional apple juice, rather than a brand. But...Breizh Cola it's also a brand, but it's different.

- *Why is it better because it comes from the region?*

I am a bit impressed by what they achieved. They now have a good place in the supermarkets. It's good because it helps the Breton economy and just because it's Breton, by chauvinism. It's Breton, when we were children, there was no Breizh Cola. It's new and well done.

- *Are you proud to be Breton?*

Of course ! I am Breton from Finistère. If I was from Rennes, I would be less proud. In Finistère, culture is more Breton, the vocabulary is specific, some words...

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

Yes, we are very chauvinist, very attached to Brittany. It's logical.

- *What image do you have of Brittany? How would you represent/symbolize it?*

Hermina. And the sea. If I continue, it would be only clichés...

- *Which image do you have of the brand Coca-Cola?*

I think they have a huge marketing budget. I don't think many things in fact. Coca-Cola is a good brand. If you go to KFC, it's Pepsi and it's really not good.

- *Do you consider Coca-Cola as an American brand or an international one?*

American. I like old metallic adverts. I have many of them, many are from Coca-Cola. My famille comes from Philippines. There, water is more expensive than Coke. My mother is very fond of Coca-Cola for instance.

- *In general, do you like international brands?*

I am not anti-brand. But when I buy food, brand is not very important. I don't buy the very cheap products, but I think supermarkets' brands are good. But for electronics for instance, I think brand is important. I would easily buy Moulinex, HP, Western Digital...And even for food, sometimes, I prefer brands, for instance Ferrero for the chocolates...

- *Do you think international brands mean quality?*

Many brands are not as good as before. There is a decrease in quality. Everything is made to be jeté max three years after, washing machines for instance, or computers...Even HP...It's the consumption society's result.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

Yes, Coca. Sometimes, I take orange juice or Sprite.

- Do you think it would be a good idea to offer Breizh Cola at McDonald's?

Yes, it would be cool. But...it would be weird and I think people would prefer to take Coca. See, we even call "Coca" every cola soft-drink. Even for very cheap brands we say "Coca". And they do everything to make it similar to the true Coca-Cola. It's red...But, Coca changed their bottles recently, now we can distinguish the true from the others.

- Do you think you help local economy by buying Breizh Cola?

I think, yes.

- Do you consume others Breton products ? Which ones?

Apple juice, Breton biscuits, lemonade. Last day, we went picking strawberries in a farm. I have already been to the market also, but as I work, I don't really have the occasion to go.

- Do you know other "alternative" colas?

Not really, I know the supermarkets' brands such as Jeans Cola in Leclerc, Carrefour, Freeway from Lidl...

- Do you buy fair trade products?

No, except coffee for my boyfriend, Malongo.

- Do you have an opinion about globalization?

What a question! I am not fond of politics. I don't care. If somebody force me to think about it, I will think about it but no...The last time I spoke about globalization, it was in preparatory class I think.

- Do you think there is a Americanization of the world? In particular, of food?

No. I work at McDonald's and I know people pay attention to what they eat. It's diverse. There are French products. There are chicken wraps, fish...We are open to various alimentations I think. We can observe the development of Asiatic food, Japanese food for instance. Maybe it was true before, I think now people eat various kinds of food.

- Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?

I don't think so. From my Breton point of view, when we go in the North or the South, it's different. Vocabulary is different. Some people say "pocket" instead of "plastic bag" as we say in Brittany. We keep our regional identity. In Brittany, we do everything in order to cultivate this difference.

- When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?

It's more the fact to know that it's not far, it hasn't travelled a lot. I see more the supermarket

as a relay, it's always close to home, there is no constrain. For Breizh Cola, it's specific, it's not a shopkeeper, alone. There is less proximity than with a producer from which we could buy directly, and they must have a quite big factory.

- *Do you appreciate proximity?*

Yes, I am sensitive to it. We know that the product does not come from a very far place. It's the green trend in fact. We want to know better how products are made. It's green. We seek quality. For instance, strawberries from Spain arrive here not as good as they should. Local strawberries are more beautiful, stiffer.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

I heard about it but vaguely, in a newspaper or article.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation)).*

They were so scared to lose customers...I won't change anything. It's stupid. They feel threatened, that's it. When we look at it, we see, above all, that they are many colors and that is the same catch phrase as always. I think am sensitive to the "Breizh". Breizh Cola is truly Breton.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

It's good for the region. I think people should be able to choose. But many people don't care at all and occasional consumers don't see the taste difference.

- *Do you think Breizh Cola should be sold outside Brittany?*

Rather yes, because, finally, there are Bretons everywhere. When we are in another region, we still buy salted butter. But people who don't live in Brittany may not know Breizh Cola...

VII.4. Interview n°4 – Axel, Shopper and Consumer

- *Name*

Axel.

- *Age*

23.

- *City of origin*

Quimperlé.

- *Current city*

Quimperlé.

- *Occupation*

Job-seeker.

- *Do you often drink soft drinks?*

Only Breizh Cola. A little bit of Orangina. We are four at home since I still live with my parents. We drink 3 to 4 bottles per week. I often go to groceries with my mother and I also often go alone.

- *When do you consume soft-drinks? During meals, in front of TV...*

During meals. I also buy soft-drinks to go to parties, to mix with whiskey for instance.

- *Where do you buy and drink Breizh Cola?*

We buy it in supermarkets. I know they offer it in bars, but when I go out, I drink beers.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

I think that Coca is a bit more expensive. It's approximately the same. I don't look at the price when I buy because I always take Breizh Cola.

- *Which format of Breizh Cola do you buy?*

1,5 plastic bottles.

- *Why do you prefer Breizh Cola?*

Are you talking about taste or ethics?

- *Both.*

I prefer Breizh Cola's taste. It's more caramelized. I think it's ethical because it is produced in Brittany. It favors local companies.

- *Do you think it is also environment-friendly to consume local products?*

Yes, I think it helps to improve the environment.

- *Are you proud to be Breton?*

Oh yes, for sure. Almost everybody is proud of his region. And it's true that in Brittany, we are lucky.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

I don't know. In Brittany, in Corsica, and in the Basque Country, we have a stronger identity. I read an article about other alternative colas in France that are not really good and don't have a big success.

- *What image do you have of Brittany? How would you represent/symbolize it?*

The sea. I don't really know what to say. If people like so much to come here, it must be because it's beautiful and fun.

- *When there is no Breizh Cola, do you buy Coca-Cola or another brand?*

Coca. I drink Coca-Cola when I don't have choice, for instance at McDonald's. But in

minimarkets for instance if there is no Breizh Cola, I often buy Orangina instead. I am used to Breizh Cola, it's a reflex.

- *Do you like Coca-Cola?*

Yes. I used to drink Coca-Cola when Breizh Cola didn't exist. Coca-Cola is not disgusting 1 Far from being!

- *Which image do you have of the brand Coca-Cola?*

Coca exists in every country like McDonald's. It's the imperialism of the drink. According to me, it's not a problem. We are used to it. For instance, in Brittany music festivals or concerts, I know that Coca-Cola was ready to pay in order to get the contract instead of Breizh Cola. And we made a poster with a flag and an ermine. I find this a bit ridiculous. They want to eat the little Breizh Cola.

- *Do you consider Coca-Cola as an American brand or an international one?*

International. They have subsidiaries in almost every country.

- *In general, do you like international brands?*

Yes. I prefer to buy branded products. For clothes and food, it reflects quality. Breizh Cola is a brand and even if it's not international, I prefer to buy breizh Cola than very cheap drinks.

- *Do you think it would be a good idea to offer Breizh Cola at McDonald's?*

Yes, but it must be complicated. At McDonald's, drinks are mixed with water, it would be a waste of Breizh Cola. But it could work, at McDonal's meat comes from France, and I think they may have agreements with Breton companies.

- *Do you consume others Breton products ? Which ones?*

Food from markets is local, but I don't go often. There is no big brand that is truly traditional and local.

- *Do you know other "alternative" colas?*

Corsica Cola, Mecca Cola, Chti Cola. There are many of them.

- *Do you drink it?*

I have never tried.

- *Do you buy fair trade products?*

No, very rarely. It's not easy to find in supermarkets.

- *Do you have an opinion about globalization?*

Really, I don't know what I could say about that.

- *Do you think there is a Americanization of the world? In particular, of food?*

There has been a peak, but I think there is a change. There has been a fashion of fast food restaurants: McDo, KFC, Subways, but it has slowed down. Now, people are more interested

in local products.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

I'm not sure. In Brittany, we keep our identity. In Corsica, it must be the same.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

In the case of Breizh Cola, no, because I buy it in supermarkets. I take part in the Breton economy but I won't change everything.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

Yes, I've read something about it on the Internet, but I have never seen it on the street, maybe in supermarkets but I don't really remember.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation)).*

It's astounding, even hurtful that they pick up symbols for such a brand. I think it's too much because Coca-Cola works anyways. They already have the market. They do that for glean sales. If it was a new brand, why not, in order to create a market, but Coca-Cola does not need that anymore.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

Each time I go to a restaurant, there is Breizh Cola, above all in creperies. I think it's better than Coca-Cola in Breton restaurants.

- *Do you think Breizh Cola should be sold outside Brittany?*

It's not already the case? Why not, maybe for expatriated Bretons. But maybe it wouldn't work, I wouldn't buy Breizh Cola in Corsica.

VII.5. Interview n°5 – Jean-Baptiste, Shopper and Consumer

- *Name*

Jean-Baptiste.

- *Age*

18.

- *City of origin*

Paris.

- *Current city*

Nantes.

- *Occupation*

Student. I like computing and photography.

- *Do you often drink soft drinks?*

Occasionally. I think, I drink 1 or 2 bottles per month. It's an occasional pleasure. When I eat in town, I take cans.

- *When do you consume soft-drinks? During meals, in front of TV...*

It's more outside home when I eat with friends or during parties. Also, when I go do groceries with my parents, I take Breizh Cola.

- *Which one do you buy the more often?*

Breizh Cola, usually bottles in supermarkets. In town, it's more Coca-Cola in cans . There is no choice between the two. If had choice I would always take Breizh Cola.

- *Where do you buy/drink Breizh Cola?*

There is Breizh Cola in almost everery Breton city or village. In bars also, they sometimes offer it.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

I think Breizh Cola is a little bit less expensive than Coca. Anyways, I go to the supermarket in order to buy Breizh Cola, I know what I want, I what it what it is worth.

- *Why do you prefer Breizh Cola?*

I like Brittany. If we can buy Breton products, we go for it. It's better to pay a Breton thing than an American one.

- *Do you think you help local economy by buying Breizh Cola?*

I have never tried to find where the money is going, but I think it goes to Brittany. It takes part in Brittany's development. I drink other Breton products, not only Breizh Cola.

- *Which ones?*

Beers: Philomenn, Penhors, Spoum for instance.

- *Are you proud to be Breton?*

We can say yes, even a lot. I think it comes before being French. I say more that I am Breton than French.

- *But you were born in Paris?*

I only lived there during my first three years. I don't really know to say...

- *No problem. Let's go the next question. Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

The Bretons were the first indeed. In Brittany, people have a stronger identity. It's the same in Corsica. People distance themselves from the others. The Lancelot Brewery which launched

Breizh Cola helped other regions to develop their colas, for the taste, in Corsica, in Auvergne...

- *What image do you have of Brittany? How would you represent/symbolize it?*

If I had to define Brittany with words, it would be beautiful, attractive, natural. If I had to draw something, it would be an hermin, a Breton flag. When I draw Brittany things, which happens, I often draw hermins.

- *Do you find Breizh Cola's taste better than Coca's one?*

It's more caramelized. Many people say that, but I have never tried the two in a row. I think Breizh Cola puts better things in their recipe.

- *When there is no Breizh Cola, do you buy Coca-Cola or another brand?*

When there is no Breizh Cola, I take Coca-Cola or nothing. Sometimes I go to the supermarket just to buy Breizh Cola. There are also alternatives like the Beuk.

- *Do you drink Beuk?*

In fact, my cousin has a wine shop. He sells quite many Breton products. He defends Brittany. He told me about Beuk but I have never tried.

- *Which image do you have of the brand Coca-Cola?*

The Americans, so not so good. The Americans invade us with their Coca. We can even clean things with Coca, it is harsh. It does not make me want to buy. I was scared when I heard that. It cleans off the stomach.

- *Do you consider Coca-Cola as an American brand or an international one?*

International, still. There is Coca everywhere. In town, people ask "do you want a Coca?" when you buy a sandwich, I would prefer to hear people say "Do you want a Breizh Cola?".

- *In general, do you like international brands?*

It depends. Some of them are not honest, in supermarkets...Some have a bad after sales service...

- *Do you think international brands mean quality?*

Not necessarily. Some yes. For me, Breizh Cola is Quality, Coca is quantity.

- *Do you go to MacDonald's?*

Never, or just for the wifi. Sometimes, it makes me want to eat something there, but when we see what they put in it, I try to avoid. There, there is only Coca-Cola.

- *Do you think it would be a good idea to offer Breizh Cola at McDonald's?*

I would make it more famous. But it would work more in Brittany. I have initiated a friend to Breizh Cola in Toulouse. I buy him two or three bottles each time I go there. In the Facebook group I created, "For Breizh Cola to be sold in the entire France", there are 1900 members, I

only know 40 of them.

- *Do you consume others Breton products ? Which ones?*

Beers as I said, but salidou, which a caramel crème, sardines, caramels, biscuits, Kouign-amann, crab patés, sea food...

- *Do you know other "alternative" colas?*

When looking at the internet to find info about Breizh Cola., I found many other regions...

- *Do you drink them?*

No.

- *Do you buy fair trade products?*

I find it hard to get started, but people say it's good.

- *Do you have an opinion about globalization?*

- [Laugh], what is it? I don't even know how to explain.

- *It's the increase in interconnections in the world, people can move more, products are circulating...*

It's a good thing. It enables people to discover other cultures, eat asian food for instance. It's nice.

- *Do you think there is a Americanization of the world? In particular, of food?*

After World War Two, yes, but then every country developed itself. For food, there is McDonald's for sure but there is also Kebab. The good French don't eat bad food. They like Breton food, French food. It has a good reputation.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

Yes, a little. There are people who don't care at all, it doesn't help. Others are more regionalists, for instance for the reunification of Brittany, for Nantes to be part of Brittany. Also, there are only old people who speak Breton today.

- *Do you speak Breton?*

Just a few words.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

When I buy Breizh Cola, it helps Brittany's development, but we don't drink it differently.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

No

- *Explanation of the campaign (SNSM sponsoring and visual adaptation).*

It makes me want to buy even less. If they do special campaigns, it's because Breizh Cola is

growing. I think they did well, the poster is really well-done.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities?*

For them, it's good. Campaign is well-done. Breizh is harmful to Coca-Cola. Coca attacks. If I did not already know Breizh, I would be tempted because they make an advert for Brittany, with the hat, the lighthouse, the triskel...But I think that people who know Breizh will not change their choice.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

It's a product to introduce everywhere, in creperies and restaurants yes.

- *Do you think Breizh Cola should be sold outside Brittany?*

According to the title of my Facebook word, yes. In Paris, it would work. People are looking for it in many places. In Paris, there are Breton people, In the South I don't know if it could work.

- *Why did you create this Facebook group?*

I like everything that is Breton. At some point, I was even more fond of Brittany than today. I created in 2008.

- *Do your parents love Brittany?*

Since I was very little, we used to go in Brittany for holidays. They have a holiday house not far from Nantes. I stayed in Paris three years, then I was in Toulouse during fourteen years. I have been in Nantes for two years now. I prefer to say that I am Breton. Since I moved I feel more Breton. Before, I was a Breton in Toulouse.

- *Do you still live with your parents?*

Yes, in Nantes. But it's me who first bought Breizh Cola. I brought it back to my parents. They like Brittany for the nature, not so much for the products and the identity.

VII.6. Interview n°6 – Céline, Shopper and Consumer

- *Name*

Céline.

- *Age*

30.

- *City of origin*

Saint-Brieux

- *Current city*

Saint-Brieux

- *Occupation*

Socio-cultural coordinator.

- *Do you often drink soft drinks?*

Well, I would say one bottle per week.

- *When do you consume soft-drinks? During meals, in front of TV...*

Usually in the evening. During the summer, it can be during the afternoon, when it is warm. I also drink soft drinks during parties if I have to drive. It's more fun than water.

- *Which one do you buy the more often?*

I buy Orangina, but in the coca type, I buy breizh Cola when I am in Brittany and usually supermarkets' brands when I am not in Brittany. I also buy Scheppes and Oasis.

- *Never Coca-Cola?*

Sometimes, but in these cases, it's usually not me who buy it. I may drink Coca in parties where somebody else brought it. When I studied in Paris, I have a preference for Oasis. When I was in Bordeaux, I bought supermarkets brands of coca. But I never buy the very cheap ones which are really disgusting.

- *Where do you buy/drink Breizh Cola?*

In supermarkets. Or sometimes in bar. I go to organic cooperatives but I don't buy Breizh Cola there. I only buy basic products in organic cooperatives

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

No. I think there is no big difference. Usually I don't look at the price for this type of product.

- *Which format of Breizh Cola do you buy?*

1,5L plastic bottles.

- *Why do you prefer Breizh Cola?*

It's more in opposition to the brand Coca, to what this brand conveys, the idea of globalization and the homogenization of the world. Also, Breizh Cola is Breton, so I buy it by chauvinism. And, Breizh Cola does not make burp ! And it's good, more caramelized.

- *Do you think you help local economy by buying Breizh Cola?*

Somehow, yes. It will create jobs here, but, in the end, I don't care so much about where the jobs are created, here or in Corsica...It's fine for me if they respect labor rights. I guess Breizh Cola has its factories in Brittany, but I have no proof in fact.

- *Are you proud to be Breton?*

I am glad I am Breton. There is a festive atmosphere. It's a beautiful region. The atmosphere is nice, it's convivial. This conviviality doesn't exist everywhere.

- Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?

Yes, because there is a regional identity and it's getting out again nowadays. Bilingual schools are expanding in Brittany. It's a little region which resists to a huge brand. There is a typical aspect, people who come in Brittany must like products where it is written Breizh. Tourists must like that.

- What image do you have of Brittany? How would you represent/symbolize it?

The sea, and again the fact that it is a beautiful and festive region. We eat and drink well.

- Do you like Coca-Cola? The taste.

I prefer Breizh Cola. Coca-Cola makes burp.

- Which image do you have of the brand Coca-Cola?

Globalization, homogeneization, uniformization. There is Coca-Cola everywhere, even in desert places.

- Do you consider Coca-Cola as an American brand or an international one?

Rather international.

- In general, do you like international brands?

Not really. I prefer the small local producers.

- Do you think international brands mean quality?

No, for me, big brands do not necessarily mean quality. Some brands can base their strategy on their fame and image, and make no efforts on quality. With small producers, we can easily be sure of the way products are made.

- Do you drink Coca-Cola at McDonalds, or in fast food restaurants?

No, I don't go at McDonal's.

- Do you think it would be a good idea to offer Breizh Cola at McDonald's?

Yes, it could work. There is a McDo where they launched a foie gras burger in the South West region. It may attract a certain kind of customers. But, I never go at McDonald's so I don't really know.

- Do you consume others Breton products ? Which ones?

Local products: chesse, soap, cider, Breton flour.

- Do you know other "alternative" colas?

I think there is Palestinian one. And I guess there are other regions but I don't know. Maybe, in the Basque Country.

- Do you buy fair trade products?

Yes. Tea, Chocolate sometime but it can be expensive. It depends from the price. Sometimes,

I go in organic cooperatives, also depending on the price. I sometimes buy fruits and vegetables there, basic products such as sugar, rice, pasta...

- *Do you have an opinion about globalization?*

I think it's an homogenization of the world, there is a will that everybody does the same things, at the expense of local cultures. They want to rub out particularities to obtain an uniform world culture. For relationships, globalization is important, but I think we can and we should do it without damaging cultures.

- *Do you think there is a Americanization of the world? In particular, of food?*

No, it's more a world culture that is emerging. I don't consider it as American. America has values that may not be the same that the ones of globalization.

- *Do you think local cultural differences are disappearing?*

They tend to disappear. But, in some regions, there are fights for local cultures. The Chiapas, or to some extent, in Brittany.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

If it is bought directly yes. In a market for instance. But, for Breizh Cola, it's produced in a factory, there is not really a specific relationship.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

No.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation).*

Coca wants to take back the market share Breizh Cola stole to them. Playing on the regional ground may be efficient for them. It may work.

- *Does it offend you?*

I don't care so much about the triskel but build a partnership with a non-profit organization, I am not a big fan. Are they really interested in the fate of people down or do they only want to have their market share back...

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

It is nice for tourists. People are curious to know the product.

- *Do you think Breizh Cola should be sold outside Brittany?*

It can be tested but it would not necessarily work, except with exiled Bretons. In Paris, for instance, Bretons are nostalgic, but in other regions, it may not work.

VII.7. Interview n°7 – Sarah, Shopper and Consumer

- *Name*

Sarah.

- *Age*

28.

- *City of origin*

Vannes.

- *Current city*

Paris.

- *Occupation*

Junior financial analyst.

- *Do you often drink soft drinks?*

Quite often yes, everyday, one can for lunch, and during the evening at home. When I am tired I also buy some to bring at work since I don't drink coffee and I have to work a lot.

- *Which ones?*

Only Coca. Breizh Cola when I am in Brittany.

- *Where do you buy them?*

In restaurants for lunch, in supermarkets for home. I buy Breizh Cola when I am in Brittany to see some friends or visit my family. But in Brittany, I also buy Coca, I usually buy a bottle of Breizh just because it's fun to compare and to support their initiative.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

I have no idea.

- *Which format of Breizh Cola do you buy?*

1,5L plastic bottles or in bars during the day, they usually offer glass bottles of 33Cl I think.

- *Which one do you prefer, Breizh Cola or Coca-Cola?*

I clearly prefer Coca. I am addicted to the taste. Unfortunately (laugh). Breizh Cola is not bad, but I am really used to the true Coca-Cola. In fact, if I sometimes buy Breizh Cola, it's because it's local and fun, I think they have a good idea, their marketing is quite good. They succeeded to create a good recipe, which is not the case of all these very cheap colas, or the distributors' brands. And I love Brittany, so when I buy a Breizh Cola, it's part of the trip.

- *Are you proud to be Breton?*

Yes, I never say I'm Parisian. Because I am not, I am Breton, I just work in Paris. But even when I travel, I explain I come from Brittany, not from Paris. I think most of Bretons are

proud to be Breton. It's even usual to say we're Breton instead of French. It's kind of a joke for sure, but still, it shows how much we like the region.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

Yes, as I said, we are very regionalist so for me, it makes sense. And also, as I said, it's a nice product, they did well.

- *What image do you have of Brittany? How would you represent/symbolize it?*

The sea and parties ! Many of my very close friends are from there, you meet in high school, and you have great memories for life. Parties of the beach, festivals.

- *Which image do you have of the brand Coca-Cola?*

For me it's an incredible international brand. Coca-Cola is everywhere. I may seem bad because sometimes it spoils the landscapes... a bit like McDonalds. But, in the end, I have a pretty good vision of the brand because I think they offer a very good product. And it keeps me awake (laugh). When I studied abroad, in the US, and in Argentina, I drank Coca, not Breizh, it was part of the hangover days... Good memories.

- *Do you consider Coca-Cola as an American brand or an international one?*

International.

- *In general, do you like international brands?*

I don't really care. I think it's important for electronics for instance. But I don't necessarily buy famous brands for food or clothes.

- *Do you think international brands mean quality?*

Yes, but not always. Many huge brands make their products in China.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

I don't go often at McDonald's, perhaps once every two months. When I go I drink Coca-Cola yes.

- *Do you think it would be a good idea to offer Breizh Cola at McDonald's?*

It won't be coherent I think. And it mustn't be doable.

- *Do you think you help local economy by buying Breizh Cola?*

Yes. It's a kind of support for Breton entrepreneurs.

- *Do you consume others Breton products ? Which ones?*

Yes, traditional ones, biscuits, cider...

- *Do you know other "alternative" colas?*

Not really, I heard there were other regional colas but I've never seen and tasted them.

- *Do you buy fair trade products?*

No. Or very rarely, if I see it nearby a product I want and that the fair trade one has the same price. It's sometimes the case for chocolate.

- *Do you have an opinion about globalization?*

From what I lived when I travelled, it's a good thing. But I know, it implies many inequalities. It also bring people, especially the one who have

- *Do you think there is a Americanization of the world? In particular, of food?*

No, people don't only eat McDonald's. Sushis are everywhere for instance. I think we still eat various kinds of food, maybe more than before.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

To a certain extent yes, but people react and want to preserve their cultures. Look at Breizh Cola.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

Somehow yes. I know Breizh Cola is a little structure compared to Coca. Then, when I buy it, I have the impression it's a different kind of purchase. But for sure, the supermarket remains the same.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

I've heard about it, but I've never noticed it

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation).*

Yes, it shows they still consider the world is diversified. They say to customers "Hey, we know you are attached to your culture, we don't want to ignore it". But I am not sure it is efficient, Bretons can be narrow-minded.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

Yes, it's fun for tourists.

- *Do you think Breizh Cola should be sold outside Brittany?*

Not really, I think it would not make sense. It's made for Brittany, not for France, it's in the name!

VII.8. Interview n°8 – Simon, Shopper and Consumer

- *Name*

Simon.

- *Age*

32.

- *City of origin*

Rennes.

- *Current city*

Rennes.

- *Occupation*

Town hall employee

- *Do you often drink soft drinks?*

1,5L per day. I drink only Coca-Cola, Breizh when there is only that. Sometimes, I drink 7Up.

- *When there is only that?*

Yes, sometimes I go in bars where they only offer Breizh Cola, there are two or three bars where I go where it is the case.

- *You never buy distributors' brands?*

No, only Coca, only the true one.

- *When do you consume soft-drinks?*

I only drink water when I take medicines (laugh). Mostly during meals but also during the day.

- *Where do you buy/drink Coca-Cola?*

In bars and supermarkets.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

I would say it is quite similar but I don't look at prices. I never think about it because I only buy Coca or 7Up.

- *Which format of Coca-Cola do you buy?*

1,5 plastic bottle.

- *Why do you prefer Coca-Cola and almost never buy Breizh Cola?*

Because coca's taste is coca's taste. Breizh Cola is more caramelized, sweeter, I prefer Coca. I started with the true taste of Coca, I'm fan of the true Coca's taste.

- *Have you already bought Breizh Cola at the supermarket?*

Never I think. I tasted in bars, if there is only that, I drink it, I don't vomit after! (Laugh).

- *What do you think about Breizh Cola?*

The only good thing is that the factory is in Brittany, it creates jobs. The rest, I don't care.

- *Are you proud to be Breton?*

I quite happy, it's better than being Parisian! I like my region.

- Why do you like it?

For its folkloric dances and climate (laugh). No, no, it's a beautiful region, we have a good mentality. For its musical life, its festivals. It's a lively region.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

(Hesitation). I don't know.

- *Are Bretons more regionalist?*

Yes, I think. We have a strong cultural identity.

- *What image do you have of Brittany? How would you represent/symbolize it?*

I don't know. It's beautiful.

- *Which image do you have of the brand Coca-Cola?*

They are talented. There is no company stronger than Coca in business. It's a multinational it's not good but anyways, they are talented. I am not pro-capitalism, I think it's not that good. In anyplace you go in the world, there will be coca. It's impressive.

- *Do you consider Coca-Cola as an American brand or an international one?*

American.

- *In general, do you like international brands?*

Not really. For food, no, I usually buy distributors' brands.

- *Do you think international brands mean quality?*

Sometimes, for shoes, for electronics.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

I don't go at MacDonal'd's.

- *Why?*

I don't want to. I was going during a time, but it's not really good.

- *Do you consume Breton products ? Which ones?*

Yes because I go to the market.

- *Do you know other "alternative" colas?*

No.

- *Do you buy fair trade products?*

No.

- *Do you think there is a Americanization of the world? In particular, of food?*

I don't know what they exactly eat in the US, I have never been. If they eat microwaves dishes, yes there is (laugh).

- *Do you think local cultural differences are disappearing? Do you think that there is a*

cultural homogenization?

It's ok. In Brittany, it remains.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

Yes, when I buy product in a market.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

No.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation)).*

If they really help an organization it's good. For the triskel, I'm sure it's efficient. The poster is really nice.

VII.9. Interview n°9 – Charlène, Shopper

- *Name*

Charlène.

- *Age*

40.

- *City of origin*

Paris.

- *Current city*

Paris.

- *Occupation*

Mathematics teacher.

- *Do you often drink soft drinks? Colas?*

Not really. I rarely drink soft drinks. However, my children are really fond of soft drinks; I would say that they drink soft drinks almost every day.

- *When do they consume soft-drinks? During meals, in front of TV...*

My children consume soft drinks when they have their afternoon snacks.

- *Which brands do you buy?*

I usually buy Coca-Cola. However, when I am on holidays in Brittany, I generally buy the local cola.

- *Which one do you buy the more often?*

Coca-Cola.

- *Where do you buy/drink Breizh Cola?*

I only buy Breizh cola when I am on holidays there, so when I visit my parents in Brest, about three times a year.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

Well I have absolutely no idea. Price is definitely not an important criterion when we are on holidays!

- *Which format of Breizh Cola do you buy?*

I generally buy the plastic 1,5L bottles, since we have a big family.

- *Never glass bottles?*

Never. Unless we are in a bar. Glass bottles, although very stylish, are too heavy to carry and don't contain enough.

- *Why do you prefer to buy Breizh Cola in Brittany while there is also Coca-Cola there?*

Well, I prefer it because it is a local product. I like the fact that the company is local and somewhat a bit like a "family" business. At least that's what I think when I think about Breizh Cola. What is more to me, it represents a regional folklore.

- *Do you think you help local economy by buying Breizh Cola?*

Yes, I hope so! It's one of the reasons why I buy the brand!

- *You are not really Breton but you have Breton family, are you proud of it?*

Well I am not Breton, but my Dad is. So I like to feel like I belong there too, and yes, it does make me proud.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

Yes it makes sense that the product has such a big success; people in Brittany are proud to be from there and like to support everything that is local. What is more, the recipe is very good.

- *Are Bretons more regionalist?*

I don't think that they are more regionalist, compared to the Basques or people from Corsica. However, I do think that they like to show where they belong to and that they are maybe more eager to support local initiatives.

- *What image do you have of Brittany? How would you represent/symbolize it?*

To me, Brittany symbolizes holidays and thus beach, boats, small villages, bigoudènes, dolmens, crêpes, galettes, cider...all the tourist clichés really, because I am only there when I am on holidays!

- *If you had to draw Brittany?*

I think that I would symbolize it by its flag. I would draw the region and then draw a dolmen,

a bottle of cider and a bigoudène.

- *Do you think Breizh Cola's taste is better?*

I can't say because I don't really drink sodas, so I don't really have a taste for it. But from what I see with my children, they seem to like both equally.

- *When there is no Breizh Cola, do you buy Coca-Cola or another brand?*

Coca-Cola.

- *Which image do you have of the brand Coca-Cola?*

It is a huge and international successful brand; for me it really represents the United States.

- *Rather positive, rather negative?*

Neutral, I don't care, it's just a brand!

- *Do you consider Coca-Cola as an American brand or an international one?*

Both.

- *In general, do you like international brands?*

Well, yes because for me an international brand is very often a quality signal. I know what to expect and this is what brands should stand for.

- *So, Coca-Cola is quality?*

It is indeed.

- *Does your family drink Coca-Cola at McDonalds, or in fast food restaurants?*

We never eat fast food.

- *Do you consume others Breton products?*

When I am on holidays I try to buy as many local products as possible.

- *Do you know other "alternative" colas?*

I know Corsica Cola, that's all.

- *Where did you discover it?*

When I was on holidays there, we tried it.

- *Do you buy fair trade products?*

Sometimes.

- *Why?*

I can't really afford to always buy faire trade products, they are quite expensive.

- *What do you think about globalization?*

I have no clue! I am not fond of politics.

- *Do you think there is a Americanization of the world? In particular, of food?*

No not at all. It's not because some international food brands are American that the world is becoming American!

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

No, I think they are still present. There is a degree of homogenization, but local cultures are not about to disappear. On the contrary, I think that the “fear” that people have of homogenization makes people want to be more attached to local cultures.

- *That’s the case for Breizh Cola?*

It’s an illustration yes because it is a very local product.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

I personally think so.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

Never saw it.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation)).*

It shows they try to be closer to consumers. It can be good if it is an honest approach.

Sponsoring may help the region.

- *Do you find the poster nice?*

It is yes, there are a lot of colors, there is the sea. It’s nice and quite local.

- *Do you think that in restaurants, bars, Breizh Cola is an important product?*

Yes, it’s positive for the region.

- *Do you think Breizh Cola should be sold outside Brittany?*

No, it wouldn’t make much sense.

VII.10. Interview n°10 – Annie, Shopper

- *Name*

Annie.

- *Age*

57.

- *City of origin*

Clohars.

- *Current city*

Clohars.

- *Occupation*

Doctor.

- *Do you often drink soft drinks?*

I don't drink soft drinks. I buy it sometimes, but not for me.

- *For who and which occasions do you buy it?*

For guests. Some of them like coca with their whiskey.

- *Which soft drinks do you buy?*

Breizh Cola.

- *You never buy Coca-Cola?*

I buy Coca-Cola only when there is no Breizh Cola.

- *Where do you buy Breizh Cola?*

In supermarkets.

- *Do you know which one is more expensive, Coca-Cola or Breizh Cola?*

No.

- *Which format of Breizh Cola do you buy?*

In small bottles or cans. There is no Breizh Cola cans but small bottles.

- *Why do you prefer Breizh Cola?*

I don't like the product, being Coca-Cola or Breizh Cola, but I prefer to buy a product produced locally.

- *To help the economy?*

Yes, and also for ecology. There is less transportation when the product is local.

- *Are you proud to be Breton?*

Rather yes.

- *Why?*

Because I like my region, I've almost only lived here.

- *Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?*

I don't really have idea about this. There are many people, many tourists, and it's more regionalist, like in Corsica.

- *What image do you have of Brittany? How would you represent/symbolize it?*

The coast, the littoral.

- *Which image do you have of the brand Coca-Cola?*

Breizh Cola enables me not to buy Coca-Cola. I am not a big consumer so, it must not bother them so much... I don't have a particular image. Coca is a very strong international company.

The product, from a nutritional point of view, is not the best existing.

- *Do you consider Coca-Cola as an American brand or an international one?*

American.

- *In general, do you like international brands?*

No, I am quite indifferent to huge brands, even rather opposed to them.

- *For which reasons?*

I am not convinced by the quality of their products. The way they have their production sites in countries where they take advantage of small producers and the country itself.

- *Do you drink Coca-Cola at McDonalds, or in fast food restaurants?*

Never.

- *Do you consume other Breton products ? Which ones?*

Dairy products. I try to buy as many Breton products as possible. I try to know where they have been made.

- *Do you know other "alternative" colas?*

No.

- *Do you buy fair trade products?*

Yes, coffee, cacao, tea. I buy them in organic cooperatives, and sometimes in supermarkets.

- *Do you have an opinion about globalization?*

It's worrying. It goes towards an uniformization of food consumption. Everybody will eat the same, at the expense of the local production and the food culture of each country.

- *Do you think there is a Americanization of the world? In particular, of food?*

It becomes more international even if it was originally American. Now, Europe takes part in the uniformization with Nestlé, Danone that are also everywhere.

- *Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?*

They remain alive thanks to activists who give good will to make cultures last.

- *When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?*

Yes, sometimes, I buy directly to the producer, cheese, strawberries, seafood. When I go on holidays in France, I go to markets, I buy what is local.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

I think I've seen that, I must have read an article about it.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation).*

It's a pity that Breizh Cola could not build a partnership with the SNSM before them. It's not

a good thing, they take advantage of an organization which makes many interesting things but has difficulties to balance its budget. It had not parasited me yet, but it could.

- *Do you think Breizh Cola should be sold outside Brittany?*

Yes it could, there are Bretons in many other regions.

VII.11. Interview n°11 – Pierre, Bar Manager at L’Aethernam, Rennes

- *Name*

Pierre.

- *Age*

25.

- *City of origin*

Quimperlé.

- *Current city*

Rennes.

- *What’s your job.*

I am bar manager at L’Aethernam. I am bartender but I manage the other bartenders since the boss is often in another business he has. I also take part in decisions such as choosing the drinks we offer.

- *Do you offer Breizh Cola?*

No. We have Coca-Cola. No bar can offer both. We have to choose. I think there are 5 bars which offer only Breizh Cola in Rennes. Sales people ask us to choose. When you choose Breizh, you choose the Breton coca, not the American one.

- *Breizh Cola is part of the Lancelot Brewery, does it imply some special agreements?*

Yes, some bars I know that offer breizh Cola also offer the Lancelot beers but it’s not automatic. In my bar, we offer a blond beer bottle form the Lancelot Brewery. They suggested Breizh Cola for our bar but we preferred to keep Coca-Cola.

- *Why?*

From my experience, when I worked in Belle-Ile, at the bar Le Tilleul, quite many people were refusing Breizh Cola. We were selling only Breizh Cola and people wanted the true Coca. There, customers were mostly tourists and they wanted Coca. But there were also people who are happy because it’s a regional product and they are basic tourists. I think Breizh Cola is good for the image of Brittany but they try to be considered as a left-wing regional coca...There are some true anticapitalist cocas but for breizh Cola, their only

objective is to sell their drink in Brittany.

- *Which anticapitalist cocas are you talking about?*

Beuk. I have drank it once, it's sold in little boutiques, like fair trade or Breton boutiques.

- *In your bar, do some people ask for Breizh Cola?*

It happens.

- *According to you, for which reasons do they prefer Breizh Cola?*

There are people who prefer Breizh for the taste which is very different. An also, I think, not to buy American.

- *Do you think it's also a preference for local products' consumption?*

A bit perhaps yes.

- *In some of the interviews I made, consumers explained me they were quite impressed by Breizh Cola and the way they compete with Coca-Cola. What do you think?*

It does not impress me that much. In Brittany, we have a strong culture, when you sell something with Brittany on it, it works. But they got the idea for sure. But in the end, it's like Coca-Cola, they use the same methods but at a regional scale.

- *Did the Coca-Cola salespeople already talked about Breizh Cola with you?*

No.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

No.

- *(Explanation of the campaign (SNSM sponsoring and visual adaptation).*

I haven't seen it, maybe I did not pay attention. We don't have this communication in our bar, I think we sell enough Coca.

- *What do you think about it?*

They do that because they face competition. Maybe there is not so much of this campaign in Rennes because it's not that touristic.

- *What type of customers hangs in you bar?*

Mainly young working men and women.

- *Students?*

Yes, also, but there are more working people.

- *Tourists?*

Very little. Rennes is a student city; it's the contrary of the other Breton places because it's in the interior of Brittany so seasons are reversed. In a bar, we work hard all year long and during the summer, it's quieter.

- *What do you think about the fact that Coca-Cola tries to adapt its communication to*

regional cultures?

I can't really see the point. It remains Coca, people see it is Coca. But, for sure, sometimes people are stupid, they see a triskel so they buy. It must work. They should have better done a concrete action for Brittany, financed some actions. The only credibility of the poster is the project with the lifesavers. It's not because you put an Eiffel Tower on a product in Paris that sales will improve.

- Do you offer Breton products in you bar?

The Duchesse Anne beer in bottle, some cider. No Breton whiskey because it doesn't have good reputation. We have Belgian beers so there is no interest for us selling all the Breton beers.

VII.12. Interview n°12 – Jacques, Le Surcouf Bar Owner, Quimperlé

- Name

Jacques

- Age

39

- City of origin

Quimperlé.

- Current city

Quimperlé.

- What's your job.

I am bar owner in Quimperlé.

- Do you offer Breizh Cola?

Yes, we do.

- Breizh Cola is part of the Lancelot Brewery, does it imply some special agreements?

Not really, but yes we sell some of their beers.

- In your bar, do some people ask for Coca-Cola?

Yes, I have to say it happens quite often. But many people really like Breizh Cola.

- According to you, for which reasons do peoples prefer Breizh Cola?

It's from Brittany!

- Do you think it's also a preference for local products' consumption?

Yes, maybe.

- According to you, for which reasons do some people still prefer Coca Cola?

The taste, it remains the true Coca-Cola.

- *In some of the interviews I made, consumers explained me they were quite impressed by Breizh Cola and the way they compete with Coca-Cola. What do you think?*

That's true, they offer a good product, nice packaging, good taste compared to many colas.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

Yes. I think it may be good for their sales. We, as restaurants and bar owners in Brittany, we want to have a Breton image, some of us are in touristic region. If Coca-Cola adapts its communication, it's good for businesses who prefer to offer Coca Cola. They thus have the true taste and the Breton image.

VII.13. Interview n°13 – Pierre-François, Drinks' Department Supervisor at Intermarché

- *Could you please explain your job?*

I am Drinks' Department Supervisor. Basically I manage the department of drinks, soft drinks and alcoholic beverage. I take care of promotional campaigns, sales, etc.

- *What main cola soft-drinks do you sell?*

Like in every supermarket I think: Coca-Cola, Breizh Cola, Pepsi, private label colas, discount colas.

- *Which is the one you sell the most?*

Coca-Cola of course. In second position there is Breizh Cola.

- *Do you observe a growing interest for Breizh Cola?*

Yes. In our supermarket, Breizh Cola represents around 7% of colas'sales. Also, from what I see, the trend is better for Breizh Cola. Their sales increase more than Coca-Cola's. In one year, Breizh Cola may increase by more than 10% or 15%. It's not the case of Coca-Cola for sure, since it has been in every supermarket for ages.

- *In your opinion, why do many consumers like buying Breizh Cola?*

Bretons like Brittany. The product is fun and good compared to other non Coca-Cola colas. Also, what need to be taken into account while considering Breizh Cola success, The price is lower than the price of Coca-Cola. Sales increase also because Breizh Cola does more promotion than in the past. Posters are widespread in bars for instance, which make the product kind of famous in the region. Also, beyond the price, there is a pack promotion which

attracts the customer. Now, Breizh Cola is available in pack of six 1,5L bottles like Coca-Cola is.

- *Do you know that Coca-Cola launched a campaign that specially targets Brittany?*

Yes. Stakes have nothing to do with another regional cola brand and I think Coca-Cola knows it. Brittany is way more attached to its roots, and Breizh Cola is well developed.

- *What do you think about it?*

I think it's good if they give money to associations. How could it be bad? And concerning the posters with Breton symbols, why not, it shows they pay attention. For sure it's in order to sell more, but that's the aim of every business, including Breizh Cola.

- *How do you consider these two products, Coca Cola and Breizh Cola?(perception of quality, brand,...)*

For me they are both quality products. Their brand are well-developed. Breizh Cola spreads a nice vision of Brittany. Coca-Cola remains the reference. For some consumers, it's too American, but at the same time, who does not like Coca-Cola ?

VII.14. Interview n°14 – Arnaud Jobard, Coca-Cola Enterprise's Distribution Network Manager

- *Presentation of myself and my thesis*

- *Could you please explain your function?*

I am Coca-Cola Enterprise's Distribution Network Manager. I manage the national agreements with the hypermarkets, for instance which price Carrefour would pay...etc.

- *What is the degree of freedom of Coca-Cola Enterprise France towards Coca-Cola Enterprises, and The Coca-Cola Company?*

In every country, Coca-Cola has a bicephalous structure. There is the bottler and the representation of Coca-Cola Company. In France, there is Coca-Cola Enterprise and Coca-Cola France, the direct representation of The Coca-Cola Company. In Spain, there are three bottlers. In some Maghreb countries, there are 7, 8, to 10 bottlers. The Company deals with the media, the consumers, the concentrate formula, the graphic standards, the world partnerships such as the World Cup or the Olympic Games. For instance, the Company deals with the tv commercials. The bottler mixes the concentrate with sugar, water...Coca-Cola Enterprise commercializes the product, deals with the operational marketing in retail outlets. It deals with shoppers which are nor necessarily the consumers since it can be the mother who buys Coca-Cola but don't drink it. The bottler has a total freedom on retail outlets, for

instance, it can decide to introduce an animator in the supermarket, to offer specific promotions such as packs. Coca-Cola Enterprise has a total freedom towards Coca-Cola Enterprises in Europe. For sure, Coca-Cola Enterprises try to be coherent, to have the same graphic standards for instance, but it is free to deal with clients in specific ways, to choose promotion periods...The Company of course deals with big events and partnerships such as the World Cup as I already said.

- Concerning the campaign launched in Brittany, who took the decision? Was it hard to implement such a regional plan?

In France, there are 7 commercial regions. Each region presents a business plan. The West region thus presents its action plan. Then it is discussed at Coca-Cola Enterprise. Coca-Cola is a French company. 95% of the products used come from France. It's way more French than some French brands. Coca-Cola Enterprise makes live our collaborators, their families, thanks to factories, logistic platforms in France. It is deeply rooted locally. Brittany is the region in France where the consumption of soft drinks per capita is the lowest. The market share is lower than in other French regions. Bretons drink more beers, they are not big consumers of soft drinks. Breizh Cola is the only one which succeeds. But this campaign is not an anti-Breizh Cola plan. We know that it is not going to overtake us. We are used to asset marketing. In Brittany, in festivals, celtic festivals for instance, or Les Vieilles Charrues, partnerships were harder. Festivals prefer to partner with Breizh Cola. That's why the Brittany Plan increased the resources to be used in the region, the number of commercials, etc. Also, it's a plan that is concentrated on the summer season because Brittany is touristic. Then, there is the graphic Breton standards which remain very Coca anyways. Thus, to answer you question, I would say that the plan was initiated by the region, then validated with Coca-Cola Enterprise in France. The graphic standards were also validated by the Company in France, and by Atlanta. But it's was not really a validation by Atlanta in the sense of authorization or not, it was more an agreement, a simple validation. It's not completely exceptional. In France, there is also, the Mountains' plan for instance, in the Rhône-Alpes region, during the ski season.

- According to you, does it, it is a step towards more regional adaptation, in France and in the world?

I don't think so. The aim is to strengthen the local rooting for sure but not to let the graphic standards being modified in all directions. The partnership with the SNSM also reinforces the local rooting. But the role of the Company in Atlanta is to remain a global brand. The Company does not focus on regions in TV commercials for instance, but it nor against.

- Do you think that Coca-Cola's success comes from the fact that it is an international drink?

I don't know. I think it's a brand which goes through all fashions. It is an historic, an old brand, but it is always modern. It is 125 years old this year. Everybody knows it is an international brand. For sure we don't drink Coca only for its taste. There is the experience of drinking a Coca. There are values, the form of the bottle...

- Do you think this regional adaptation can be efficient and bring more consumers?

We do measure performance. We look at shares' evolution. But what is hard is that the Brittany Plan is added to what we do anyways. I can tell you that it is well perceived by customers and consumers. You know, Breizh Cola is an epiphenomenon. For sure, we look at Breizh Cola's development in Brittany. They've done well. The product is good.

- Many consumers I interviewed prefer to consume local products because it helps local economy and it's green. They often consider Coca-Cola as a huge American firm and think it is not Breton symbols on a poster that would make them buy Coca-Cola instead of Breizh Cola. You said that Coca-Cola Enterprise was a French company, that the products used come from France, etc. Are you thinking about communicating about that?

They are right. Yes, we do it, in the mainstream and professional press. It's more an institutional kind of communication.

- Breizh Cola has developed a stevia Cola. Does Coca-Cola keep an eye on this?

Today, there is no international brand which developed stevia products. We have bought stevia Breizh Cola. We have tasted. I think it's quite clever. People have been spoken a lot about it. But, is it the future or just a fashion? We helped sales force to build an blurb. Also, we have been the first to launch a stevia product, Fanta Still. But the problem with stevia is that there is not enough of it. Another problem is that it has a taste. It changes the taste of cola. That's why it is a Company's subject; it has to do with the recipe.

VII.15. Shoppers and Consumers' Interview Guide

- Name
- Age
- City of origin
- Current city
- Occupation
- Do you often drink soft drinks?
- Which ones?
- When do you consume soft-drinks? During meals, in front of TV...

- Which one do you buy the more often?
- Where do you buy/drink Breizh Cola?
- Do you know which one is more expensive, Coca-Cola or Breizh Cola?
- Which format of Breizh Cola do you buy?
- Never glass bottles?
- Why do you prefer Breizh Cola?
- Are you proud to be Breton?
- Do you think it's normal that such a regional drink has a bigger success in Brittany than in other regions?
- What image do you have of Brittany? How would you represent/symbolize it?
- When there is no Breizh Cola, do you buy Coca-Cola or another brand?
- Do you like Coca-Cola? The taste.
- Which image do you have of the brand Coca-Cola?
- Do you consider Coca-Cola as an American brand or an international one?
- In general, do you like international brands?
- Do you think international brands mean quality?
- Do you drink Coca-Cola at McDonalds, or in fast food restaurants?
- Do you think it would be a good idea to offer Breizh Cola at McDonald's?
- Do you think you help local economy by buying Breizh Cola?
- Do you consume others Breton products ? Which ones?
- Do you know other "alternative" colas?
- Do you drink it?
- Do you buy fair trade products?
- Do you have an opinion about globalization?
- Do you think there is a Americanization of the world? In particular, of food?
- Do you think local cultural differences are disappearing? Do you think that there is a cultural homogenization?
- When you consume a local product, do you think it implies a more sincere relationship with the shopkeeper or producer?
- Do you know that Coca-Cola launched a campaign that specially targets Brittany?
- What do you think about the fact that Coca-Cola tries to adapt its communication to local diversities? (Explanation of the campaign (SNSM sponsoring and visual adaptation).
- Do you think that in restaurants, bars, Breizh Cola is an important product?
- Do you think Breizh Cola should be sold outside Brittany?

VIII. Reference List

This thesis is written in APA style (but with a 1.5 space as required by FGV). The guide provided by the Psychological American Asssocation has been followed (The basics of APA Style tutorial: <http://www.apastyle.org/learn/tutorials/basics-tutorial.aspx>). The Purdue Online Writing Lab has also been used (APA Formatting and Style Guide. doi: <http://owl.english.purdue.edu/owl/resource/560/01/>), as well as the IRSC Libguides (APA Style Guide <http://irsc.libguides.com/content.php?pid=176029&sid=1482290>).

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