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HOME COUNTRY IMAGE ATTRIBUTES AS SOURCE OF COMPETITIVE ADVANTAGES: INTERNATIONAL BRAZILIAN FASHION INDUSTRY STUDY

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Abstract: Research sought to understand which country image attributes pose as source of international market competitive advantages for the Brazilian fashion industry's context. The theoretical framework was cornerstoned by studies on sources of competitive advantages, home country image, Brazilianism and its attributes in terms of fashion wear. An exploratory empirical survey with a qualitative approach was conducted. Outcomes suggest that Brazil's image is perceived by the international fashion industry as per attributes gathered in existing literature on Brazil's identity. However, (i) when it comes to fashion, the market still hasn't shaped an image of Brazil; (ii) Brazilianism attributes in fashion might, if communicated, understood and promoted on the international front, pose as source of competitive advantage and finally, (iii) amongst the eight fashion Brazilianism-related attributes literature pinpoints, four stood out as differentiators, namely: shape and volumes, colours, prints and lifestyle.

Keywords: Competitive advantage; Home country image; Fashion; Brazilianism

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Introduction

As of the 80's, competition picked up and became increasingly intense at most economic domains such as for instance, in the US and at European and Latin American countries. This context derives from constant changes and phenomena like market integration and technological advances that broke communication barriers down, narrowed the gap between market players in search of peers that might ensure better commercial transaction conditions and resulted in further intensification of competition within markets (GIRALDI; TORNAVOI, 2004).

Sheltered by this environment, the Brazilian textile industry faced several re-engineering events that also picked up still during the end of the 80's including the modernizing of industrial facilities and technological improvements (BRAGA, 2008). Until this decade, there were safeguards that protected products manufactured in Brazil from those imported. By 1990, rulings reduced import duties and did not include internal policies to prepare Brazilian entrepreneurs to compete in a renewed and dynamic global market that featured opponents who in contrast were supported by their governments via export incentive measures. This drove many large companies bankrupt (AVELAR, 2009) and pushed survivors into redefining their competitive strategies (COSTA; ROCHA, 2009). At the time, Brazil had not as yet started to encourage the creation culture since local fashion brand names adapted international market designs.

One of the alternatives that domestic fashion segment companies adopted was to seek references in the stereotypes the country offered in the form of what is herein referred to as Brazilianism (MESSIAS, 2009). Elements that echo the Brazilian culture – in the form of Brazilianism – thus came to be employed by designers and brand names in their collections, land marking the production of differentiated fashion made in Brazil (VILLAÇA, 2007).

It is within this context that home country image attributes as applicable to the fashion industry – herein named Brazilianism attributes in fashion – emerge as potentially differentiating elements that one might incorporate into fashion industry products and brand names which may inclusively shape as source of competitive advantages before the international market. Nevertheless one must keep in mind that the fashion segment in itself is still consolidating Brazilian roots as of explicit narratives that are part of the local and international imaginary on Brazil's society and its people (LEITÃO, 2009; SABRA, 2010; VILLAÇA, 2007; CENTENO, 2010; BRAGA, 2010).

This study associates two subject matters, namely: the home country's image and competitive advantage sources employing as research object the Brazilian fashion segment. Its overall purpose consists in understanding which country of origin attributes serve as source of competitive advantage before the international marketplace. The study specifically (i) checks literature to pinpoint the attributes that comprise a country of origin's image within the Brazilian fashion context on a global basis, and (ii) identifies which are acknowledged and appreciated by fashion segment market players.

Conceptual framework

Sources of Competitive Advantages

Given the current market context, companies can chose between two competitive strategy alternatives – cost leadership or differentiation (PORTER, 1989) – to attain and sustain competitive advantage before their competitors (TOLEDO; ANSELMO, 2003). The elected

strategy demands companies chose a market approach that rests on at least, one source of competitive advantage.

Barney and Hesterly (2007) understand that a company coins competitive advantages when it is able to generate more economic value than its competitors. The scholars advocate that economic value is the difference between the corporate product/service purchase benefits consumers perceive and the production and sales costs of such products/services. Along the same line of thought, Wen-Cheng, Chien-Hung and Ying-Chien (2011) state that corporate competitive advantages arise when a company is capable of delivering the same benefits its competitors deploy but at a lower price (cost leadership) or delivers benefits that exceed those made available by competition (differentiation advantage).

According to Lambin (2000), competitive advantages emerge when corporate product or brand name characteristics and/or attributes, ensure a certain degree of superiority to the same before direct competitors. Attributes of the kind may either be intrinsic to the product or derive from required or added on services or for instance, relate to how the company produces, distributes and sells the product.

Wen-Cheng et al. (2011) do not differentiate competitive advantage sources but rather advocate that it springs from technology and innovation; from the company's organizational structure and human resources. Orsato (2006) on the other hand states that to identify the sources of competitive advantages there must be a stark distinction between products/services and the organizational process. Therefore, competitive advantages might spruce either within or beyond corporate frontiers and largely depend on the competitive strategy the company has adopted (LAMBIN, 2000; BARNEY, 1991; WEN-CHENG *et al.*, 2011; PORTER, 1989).

Companies that were founded at emerging markets may come to develop a different set of competitive advantages from those that developed country environments foster. Ramamurti (2012) advocates that in addition to the traditional advantages such as those discussed by Dunning (1988) – prosperity, internalization and location advantages – emerging country companies may hold other advantages such as: the ability to operate under challenging institutional environments, the possibility of producing at reduced costs and the capability to manufacture goods under an price/quality balance that snugly fits the market in which it operates.

Low cost differentiation which emerging country companies attain by resorting to low price strategies is common practice within the fashion industry. This strategy is primarily observed in the export of clothing produced in countries known as the Asiatic Tigers (GEREFFI; MEMEDOVIC, 2003). Brand names such as Gap, Liz Claiborne and Zara seized this low cost strategy without compromising their brand names given the fact that consumers are capable of understanding that local brand names may resort to off shore manufacturing platforms (AGRAWAL; KAMAKURA, 1999).

Home country images are understood as being relevant variables that impact corporate strategies and their capturing of competitive advantages (CUERVO-CAZZURA, 2012). Ramamurti (2012) emphasizes that amongst other factors, the country of origin image is a core component to explain corporate strategies at international markets and their quest for competitive advantages. Hakala, Lemmetyinen, and Kantola (2013) presume that a country's positive image may give rise to a favourable reputation that permeates an entire product category which in turn corroborates the justification for herein choosing to study the fashion industry segment.

The scope of this research only takes into account competitive advantages that are external to the company as ground on differentiation alternatives; specifically in as much as distinguishing the offering by resorting to the home country's image is concerned.

Home country image as a source of competitive advantage

To compete in the environment this study focuses on - the international market –special emphasis is placed on the distinguishing of offerings by resorting to the home country's image as a source of competitive advantage (FINESTRALI; GARRIDO, 2010; GIRALDI; TORNAVOI, 2004; 2005). This concept is extensively discussed throughout international literature by several authors (KOTLER; GERTNER, 2002; HAKALA et al. 2013; WANG; LI; BARNES; ANH, 2012; GUERCINI; RANFAGNI, 2013) and referred to as Country-of-Origin-Image (COI). Roth and Diamantopoulos (2009, p. 727) revised literature in search of the most relevant home country image definitions and according to their findings, the concept was originally known as country-of-origin-effect (COO) and pertained to the influence the country of origin's image posed on consumer product and preference assessment differences (GÜRHAN-CANLI; MAHESWARAN, 2010; USUNIER, 2006). In other words, the country of origin approach seeks to understand how the home country interferes with consumer choices (BILKEY; NES, 1982). The COO concept gradually evolved to a more ample approach known as the country of origin's image or COI (ROTH; DIAMANTOPOULOS, 2009).

According to Kotler and Gertner, (2002), one may understand the home country's image as being the sum of impressions and beliefs people have in relation to destinations. The country of origin concept comprises the analysis of stereotypes (NISS, 1995), beliefs (KOTLER; HAIDER; REIN, 1993) perceptions (NISS, 1995; NEBENZAHL; JAFFE; USUNIER, 2003;), impressions or associations consumers engender (KOTLER; HAIDER; REIN, 1993; ITTERSUM; CANDEL; MEULEMBERG, 2003). A country's image is the product of the mind that processes and selects essential information amongst the assortment of data one finds about a given location (KOTLER; GERTNER, 2002). Thus, the COI concept enables the analysis of consumer preferences for products and brand names that spring from a given country in comparison to others, emphasizing the reasons why consumers so perceive countries (ROTH; DIAMANTOPOULOS, 2009).

In alignment with the above statements, Wang et al. (2012) mention that a country's image relates to the mental representation one holds of a country and its people, encompassing cognitive beliefs on the country's economic and technological stage of development and affective assessments as to its social and political system. To this effect, inferences consumers ideate in relation to a given country are linked beliefs involving the same, whilst these in turn are shaped as of previously existing associations (GIRALDI; TORNAVOI, 2005). References of the kind are ground on country-related signs and symbols. Consequently, the image one molds of the country comes about via the overall perception that the consumer has in relation to the same, when processing information that comes from several sources over time, transforming the country of origin into an image attribute (GIRALDI; GIRALDI; SCADUTO, 2011b). That's how a country's image interferes in purchase assessments and decisions taken by consumers involving products manufactured at a given country (GIRALDI; TORNAVOI, 2004, 2005; GIRALDI; IKEDA; CAMPOMAR, 2011a).

For more than four decades, academic research has focused on studying the role of home countries in international transactions (GIRALDI et al., 2011 b). The first academic paper on the theme (COO) was published by Schooler (1965) who empirically demonstrated that consumers discriminate products that are identical in all but country of origin aspects reinforcing the notion

of how this information influences product assessments. Thereafter, the subject matter has been extensively studied by international business researchers. Findings suggest that the home country's image significantly impacts product assessments and that consumers tend to employ the same as an extrinsic variable to evaluate the quality of products they buy (AGRAWAL; KAMAKURA, 1999).

The very concept of a country of origin's image has a number of practical applications that support the development of sales and international market positioning strategies. Gürhan-Canli and Maheswaran (2000) state that studies suggest COI is employed in an assortment of contexts as a lead when consumers evaluate new products. Kotler and Gertner (2002) indicate that home country images have become part of the extrinsic quality repertoire when one assesses products before its price, brand name, packaging and vendor and as a quality indicator in itself. This is why COI must be taken into account when selling internationally branded products given the influence posed on consumer purchase decisions.

In a study on the association between country of origin related information and Brazilian products as a source of competitive advantage to their marketing abroad, Giraldi and Tornavoi (2005) demonstrated that for a company to reap competitive advantages it must feature a unique characteristic that cannot be imitated or acquired by its competitors. The scholars advocate that a product's home country offers this characteristic and this is why Brazil's image can be explored as a form of setting a differential when offering products at other markets. The approach may emerge as a source of competitive advantage should consumers perceive the superiority of the offering. For companies that pursue cross-border sales, Brazil's image might serve as an intangible resource and become the grounding for the structuring of a Brazilian products' differentiation strategy (GIRALDI; TORNAVOI, 2005).

According to Giraldi et al. (2011b), research on home country image that employ Brazil as the study's object are still incipient. This is why these scholars conducted an exploratory qualitative survey asking their sample (Dutch students) to say some words that came to their mind when thinking of Brazil. Replies were grouped into five categories, namely: population, politics, nature, sports and economy. Findings indicated that the Brazilian population's image is envisioned as of three subcategories: women (Brazilian women's sensuality and beauty); receptiveness (affectivity and hospitality); culture (food and Carnival). In as much as politics is concerned, respondents mentioned corruption, social inequality and violence as elements that comprise the country's image from this standpoint. The nature category reminded respondents of Brazil's beaches, the climate and the natural beauties. Sports-wise, idols such as Ayrton Senna and soccer were mentioned. Finally, words that Dutch associated with economy included ascendance and products (GIRALDI *et al.*, 2011b).

For the purpose of this study, the elected COI concept is that mentioned by Kotler and Gertner (2002) whereby a country's image results from its geography, history, music, art, proclamations, famous citizens and other national characteristics. Likewise, this research factors in Giraldi et al.'s. (2011b) statements whereby the country of origin's symbolic and emotional connotations shape the same into an image attribute, that in turn interferes in purchase assessments and decisions consumers take in relation to products that are manufactured at that country (GIRALDI, TORNAVOI, 2004, 2005; GIRALDI *et al.*, 2011a).

Brazilianism

Brazilianism is a somewhat undefined term that is constantly re-coined by literature since it's permanently subject to reformulation. In this study, it is understood as the set of cultural and identity-related characteristics that comprise Brazil's image. This introductory theoretical framework gathered the most relevant characteristics of the Brazilian culture, rested on the interpretations of several scholars and subsequently associated these findings with the fashion industry.

The debate involving the construction of Brazilianism and its implications is by no means one of current days. Several studies have centred on the theme. Ortiz (2006) for instance indicates that several scholars that have devoted studies to this subject matter concur that the Brazilian culture and national identity is different from that of other people and countries. However, one cannot merely rest on the notion that Brazilians are different but rather understand which aspects identify the Brazilian culture (ORTIZ, 2006).

Freyre (1995, p. 4) understands that in 1532, tropical America formed "an agrarian society structured as of an economic exploitation technique based on slavery, native Indian-hybrid – and subsequently Negro – in its composition". Freyre (1995) emphasizes the Brazilian culture's origins by pinpointing: the general characteristics of Portuguese colonization and the roles of native Indians, of the Portuguese colonizer and of the Negro slave in the blended shaping of Brazil's society. Freyre (1995; 2009) thus believes Brazilianism is a characteristic and specific essence or "nativeness" in terms of both behaviour and lifestyle of the Brazilian people and results from its history and resulting social and cultural blending. Martins (2002, p. 67) corroborates with these thoughts by stating that one can understand Brazilianism as being "a set of identifying meanings which are both close and contradictory". Along this same line of thought, Bastide (1980) states that the country is made up of three kinds of Brazils, namely: "the Amazon's, *Mato Grosso's* and *Goiás's* native Indian Brazil, the white Brazil of the South and the Negro Brazil that would primarily be that of the Northeast's coastline" (BASTIDE, 1980, p. 68). Bastide (1980) suggests that the country holds a relevant standing within the world's context and should position itself between the Anglo Saxon and the Slav world since it is a young republic that has in syncretism been able to gather an assortment of civilizations (Native Indian, African and Portuguese).

Given their findings, some scholars advocate that the use in products of cultural references from the five Brazilian regions might add value to the same, thus representing a potential opportunity for companies that are trying to conquer international markets. Finestralli and Garrido (2010) suggest that the association of Brazil's identity references might be an efficient way of differentiating Brazilian products on international markets. Morace (2009) corroborates these statements by affirming that Brazil features values that are acknowledged on a worldwide basis and that these in turn may offer great opportunities to the country when the same decides to promote them, via products.

For Morace (2009), Brazilian values include: passion for life, spontaneity in human relationships, day to day simplicity and access to an experience that brings joy to all (Carnival). This author also takes product neutrality values into account such as consumption freshness (via exotic fruits that are unheard-of at other locations); the richness and variety of colours; the smiles and sensuality of bodies; in short, the naturalness of both the environment and of the country's people.

In alignment with the herein discussed Brazilian values, the Brazilian Tourism Institute (EMBRATUR) promotes the Brazil brand name for tourism and Brazilian products' purposes. Emphasis is placed on the following attributes: joy, sinuosity, luminosity, shine and exuberance; cultural and race blend; modern and competent (MINISTÉRIO DO TURISMO, 2010). Despite the Ministry's efforts, Sebrae (2002) informs that Brazil's image abroad shall only be valued once the country self-perceives itself in a positive manner, identifying the value of what is its own people's characteristics. Ortiz (2006, p. 39) corroborates with these findings when stating that "the three race myth has not as yet been able to ritualize itself since the material conditions for its existence is purely symbolic". Hence, one understands that the value of Brazil's "mestizo" culture shall only be acknowledged once the symbolic conditions are identified by its people and transformed into material conditions.

For this study's purposes and ground on reviewed literature, assumptions include the notion that Brazilianism is a set of Brazil's culture and identity characteristics that shape the country's image, namely: racial blending; the vast range of cultural manifestations; the Brazilian women's sensuality and beauty; affectivity and hospitality; social inequality; nature; tropical climate; natural beauties; joy in life; spontaneity in human relations; day-to-day simplicity; access to experiences that bring joy to all (Carnival); richness and variety of colours; smiles, environment and people's naturalness and the Brazilian people's ambiguity (the Brazilian "knack") (BASTIDE, 1980; FREYRE, 2009; LUCAS, 2010; MORACE, 2009; ORTIZ, 2006).

Brazilianism attributes in fashion

Brazil's image in fashion, or Brazilianism in fashion, consists in the transposition of the country's identity characteristics to this segment's products and brand names. Feghali (2004) understands that when it comes to fashion, Brazil features concepts that remind people of the motto "enjoy life" and emerges in the global scenario as an alternative that expresses the opposite of that commonly found by parading "healthy models that shape the body and play with exhilarating motifs and colours, reflecting a culture that is assimilated as being fun" (FEGHALI, 2004, p.147).

The Brazilian Export and Investment Promotion Agency known as APEX (2012) believes that Brazilian fashion has been gaining space on the international arena in function of its colours, daringness and of the diversity of cultural traditions and life styles that characterize this blended nation, all of which are incorporated into its products. The richness of Brazil's raw material also emerges as a stimulating element for stylists, such as: fibres, gems, metals, laceworks and leathers (APEX, 2012). This reinforces the need to come to an understanding as to what Brazilianism represents as a concept, from the fashion industry's standpoint.

Some studies attempt to operationally formalize this research's theme. Lucas (2010) mentions that fashion in Brazil is parade of "mestizaje" that gathers lace, embroidery, plain-woven cotton (*chita*) with large and colourful flower, tropical foliage and flamboyant fruit prints. Avelar (2009) understands that in relation to other countries, Brazilian products have to add on extra aspects that express originality. The scholar indicates that experimenting on some aspects opens news grounds for differentiation and that typical elements include: fabrics, shapes and volumes, colours and the juxtaposition of all these characteristics.

Neira (2008, p.1) also sets out to understand Brazilianism in fashion and corroborates with Luca's (2010) and Avelar's (2009) findings by advocating that the nationalist ideal translates into fashion via colours, volumes and shapes that are typical of "fashion's visual grammar". In so stating, the latter scholar believes that Brazilian fashion is set by the use of primary and secondary

colours, of designs that are simplified by using artisan tooling that rescue the tropical nature aspect and of ornaments that feature details made of seeds, feathers, scales, shells or beads.

Chart 1 was prepared as of the findings mentioned by fashion and Brazilianism scholars with views to organizing and summarizing the elements that form the fashion industry's Brazilianism.

Attribute	Elements
Lifestyle	Enjoy life motto (FEGHALI, 2004); daringness; cultural tradition diversity; blended nation lifestyle incorporated into products (APEX, 2012); irony and joy in living (MORACE, 2009).
Representations of Brazil and national symbols	Use of flora and fauna images (in prints), of shapes with foliage, fruits, palm trees, flowers, jaguars, parrots, toucan prints or embroidered pieces featuring macaws in glitter and sequins (LEITÃO, 2009). Tropical ecology (FREYRE, 2009); inspiration in bookbinding, typography, illustrations, carving, ceramics, gastronomy, religious and folkloric practices (BRAGA, 2010); in cultural manifestations (RYBALOWSKI, 2008); Conciliation of national culture references with modernity in elements that refer to the country's geography, such as: nature, use of green and yellow colours; elements that establish a direct relationship with Brazil such as: beaches, palm trees, slums, <i>samba</i> , native Indian and Africanized culture, religiosity and images of Carmen Miranda (CENTENO, 2010).
Colours	Joyful motifs and colours (FEGHALI, 2004; APEX, 2012; FREYRE, 2009), primary and secondary colours (NEIRA, 2008), tropical chromatic hues (MORACE, 2009); colour coordination and composition (CASTILHO; GARCIA, 2001; DENER <i>in</i> DÓRIA, 1998),
Natural Raw Materials	Fibres, gems, metals (APEX, 2012); seeds, feathers, scales, shells (NEIRA, 2008; RYBALOWSKI, 2008); gemstones, wooden beads, straw braids (LEITÃO, 2009); handcraft produced as of "buriti" fibres (CASTILHO; GARCIA, 2001).
Artisan applications and techniques	Lacework (APEX, 2012; LUCAS, 2010); embroidery (LUCAS, 2010), manual trims – tie downs, shreds, dyed (NEIRA, 2008); Texture (elaborate wools, rustic acrylics), file lace, <i>bihro</i> lace, labyrinth lace (CASTILHO; GARCIA, 2001); reeling, lace and basketry (BRAGA, 2010); traditional techniques and use of lace, knits, application of trims, buttons, "Senhor do Bonfim" and other ribbons (RYBALOWSKI, 2008); costume jewellery using plant seeds, native Indian techniques and macramé (handcrafted native Indian technique that employs knots) made from plant materials (AGUIAR; CALDAS, 2006); <i>fuscico</i> handcraft, patchworks, quilts, knots (CENTENO, 2010).
Fabrics	Plain-woven cotton or <i>chita</i> (LUCAS, 2010; CENTENO, 2010); linen (CASTILHO; GARCIA, 2001), light fabrics (DENER <i>in</i> DÓRIA, 1998), native Indian textile plant fibre design and pattern; basketry, ecological, natural cotton, <i>buriti</i> fibres, cambric cotton, jute (CHATAIGNIER, 2006; FREYRE, 2009).
Prints	Large coloured flowers, tropical foliage and eye-catching fruit (LUCAS, 2010); simplified line designs that rescue the tropical nature's aspect (NEIRA, 2008); stamping (CASTILHO; GARCIA, 2001); vivid prints (DENER <i>in</i> DÓRIA, 1998), Alceu Penna illustrations such as the "malandro", Copacabana's sidewalks, the Chintz and the "baiana" (BONADIO; GUIMARÃES, 2010).
Forms and volumes	Each item's development and manufacturing, which can be: revealing, low-cut, short, flowing or even with slits, in part recalling the native Indian nudism (NEIRA, 2008); cuts, simplicity, creativity between art and material, easy-going pieces with light forms and textures (MORACE, 2009)

Chart 1: Brazilianism attributes in fashion

Source: Prepared by the authors

As of existing literature, one notices that the home country's (Brazil's) image in the fashion context is a construct that is still being shaped and comprises the following attributes that ground the concept itself, namely: the Brazilian people's lifestyle, the representations and national symbols of Brazil; the colours, the natural raw materials; the artisan applications and techniques; the fabrics; the prints and forms/volumes.

Methodology

To address the research problem, an empiric exploratory survey with a qualitative approach was conducted. Choice fell upon an exploratory study since that which was sought in literature – studied variables relations, namely: COI, sources of competitive advantages, fashion, Brazilianism attributes and international marketplace – was scarcely found, resulting in the absence of a robust theoretical framework that otherwise would have enabled the adoption of a quantitative and descriptive survey approach. Therefore, this study set out to identify, analyse and interpret data and information featuring different depth and complexity levels and to this effect Sampieri, Collado and Lucio (2006) and Marconi and Lakatos (2010) suggest researchers adopt a qualitative approach.

Secondary data that was gathered during the structuring of the theoretical framework served as grounding for the preparation of two empirical survey primary data collection tools. During the collection of primary data, two semi-structured scripts containing topics that were related to the studied problem were employed to interview, in an in-depth manner, five agents that support the insertion of Brazil's fashion on the international market and four demanding market agents (FLICK, 2009; KVALE, 1996).

Data was gathered via problem-centred interviews and analysed employing the discourse analysis technique (KVALE, 1996; FLICK, 2009; GILL, 2002). It prove to be an appropriate choice for analytical purposes since collection was conducted via interviews taking speech content into account. Interpretations were thus ground on interview transcriptions (FLICK, 2009).

Data analysis was conducted in four stages, namely: (i) interview recording transcription and reading of information; (ii) information codification into items and sub-items according to the major terms employed to step stone the study; (iii) results analysis and comparison with findings encountered in literature and (iv) interviewee discourse description and comparison to identify data patterns and verify recurrent reply themes (FLICK, 2009; GILL, 2002).

Interviewees

Empirical research was conducted with demanding agents and agents that support the internationalization of Brazilian fashion and the segment's structuring. Interviewed demanding agents are herein represented by four international fashion buyers (B2B – Business to business). They are wholesalers, international manufacturers and point-of-sales owners representing locations where Brazilian brand names are sold. These professionals represent international fashion segment companies and come to Brazil to conduct business at times when trade fairs such as the São Paulo Fashion Week and Rio Fashion are held (FASHION FORWARD, 2012). Agents that support internationalization were also interviewed. These professionals are devoted to fashion management and internationalization at the segment's associations, to consulting or are professionals that participate in the structuring of the studied segment. The latter occupy strategic positions at the segment's associations such as *ABIT*, *ABEST* and *APEX* and organize important trade-related events (*Casa de Criadores* and *Mercado Mundo Mix*).

Interviews were conducted in two stages. The first between June and July 2012 during two fashion events: 1) São Paulo Fashion Week – a week during which brand names and designers present their creations to both the public and buyers via fashion shows and 2) the *Première Vision Brazil* – a trade fair where jeans, urban fashion, fibres and yarns, textile design,

printing and trimming suppliers show their products in stands and receive buyers (FASHION FORWARD, 2012).

During the first stage, five demanding agents (international buyers) and one support agent (professional that works at *ABIT*- Brazilian Textile and Apparel Industry Association) were interviewed. Only three of the five interviews conducted with demanding agents were taken into account since some professionals did not meet the selection criteria that had been defined for interview purposes in as much as this was their first time at the fair and they were not acquainted with Brazil's fashion. The second data collection stage took place between October and November 2012 when two fashion events occur: a new São Paulo Fashion Week edition followed by the Rio Fashion edition. During this period, one demanding agent and four support agents were interviewed. All in all, nine interviews were conducted (five with support agents and four with demanding agents). All of the interviewed support agents are Brazilian. Demanding agents are all foreigners, namely: A6 is British, A7 is Peruvian, A8 is Colombian and A9 French.

Results analysis

Analysis started with the preparation of the chosen material: transcription of recordings and careful reading of the same, as advocated by Flick (2009) and Kvale, (1996). Passages were codified into axis according to the prime terms the study rests on, which in turn gave rise to the hereinafter analysed dimensions.

Home country's image and Brazilianism

According to literature, a country's image results from its geography, history, music, art, proclamations, famous citizens amongst other national characteristics (KOTLER; GERTNER, 2002) and that the country of origin's symbolic and emotional connotations transform the same into an image attribute, interfering in assessments (GIRALDI *et al.*, 2011b) and purchase decisions consumers make involving products manufactured at that given country (GIRALDI; TORNAVOI, 2004; 2005; GIRALDI *et al.*, 2011a).

The empirical portion of this study research accommodates part of Giraldi *et al.*'s (2011b) findings and the statements of other authors in as much as Brazil's image in the international fashion segment is concerned. This can be understood via the speech of some of the interviewees when asked about Brazilianism attributes and in other comments throughout the interviews such as for instance, that of interviewee A1. This respondent indicates that joy, optimism, improvisation, poor planning, enthusiasm, flexibility, competence in overcoming adversities, biodiversity, open spirit, tropical climate and outdoor living are some of the characteristics that comprise Brazil's image. A1 further states that Brazil "is a rich, diversified, non-antagonized, not war prone country that offers opportunities". Along the same line of thought, A2 indicates that the country's economic rise, exuberance, daringness and nature are elements of Brazil's image.

Interviewee A5 includes other important aspects deemed part of Brazil's image, namely: the sensuality that is conveyed to the international market, the joy and simplicity of the Brazilian people. As of interviewee speeches, the theoretical elements that comprise Brazil's image within this study's context were summarized into Chart 2 that follows.

Brazil's image according to the theoretical framework	Interviewees that mentioned such elements
Economic and products rise (GIRALDI <i>et al.</i> , 2011b)	A1, A2, A3, A4, A5, A6, A7 and A9.
Values: joy of life (MORACE, 2009; MINISTÉRIO DO TURISMO, 2010); spontaneity in human relationships; day-to-day simplicity; product neutrality (consumption freshness); colour richness and variety; smiles and environment and people naturalness (MORACE, 2009).	A1, A2, A3, A4, A5, A6 and A9.
Nature, beaches, climate and natural beauties (GIRALDI <i>et al.</i> , 2011b; SEBRAE, 2002)	A1, A2, A5, A6, A7 and A9.
Brazilian women's sensuality and beauty (GIRALDI <i>et al.</i> , 2011b; MORACE, 2009)	A2, A3, A5, A7 and A9.
Racial blending (FREYRE, 1995, 2009; MINISTÉRIO DO TURISMO, 2010), Brazil's plurality (BASTIDE, 1980), three race myth (ORTIZ, 2006; SEBRAE, 2002).	A1, A2, A3, A5 and A9.
Artistic expression prestige in: literature, poetry, cinema, architecture, installation art, popular music and painting (SEBRAE, 2002).	A1 A3, A4, A5 and A9.
Affectivity and hospitality (GIRALDI <i>et al.</i> , 2011b); solidarity and relational nature (SEBRAE, 2002)	A2, A5, A6 and A9.
Culture, food and Carnival (GIRALDI <i>et al.</i> , 2011b). Ample range of cultural manifestations (FINESTRALI; GARRIDO, 2010; SEBRAE, 2002).	A1, A3, A5 and A9.
Adaptability and openness to novelty (SEBRAE, 2002).	A1, A2 and A5.
Social inequality (GIRALDI <i>et al.</i> , 2011b).	A5 and A9.
Difficulty in configuring a unified image of Brazil given the elements that contribute to an ample image of the country. The reason for this rests in the fact that the geographical, cultural and social outlines are strongly associated with local and specific realities (SEBRAE, 2002).	A5 and A9.
Ambiguity which can be pinpointed in the form of the "Brazilian knack" – a social practice that aims to bypass rules (CALDAS, 2006).	A5

Chart 2: Country of Origin Image Elements

Source: Prepared by the authors

The Brazilian fashion's identity

As of that discussed during the literature review, one understands that the Brazilian fashion's identity is somewhat recent since it started to shape as of the late 80's. Interviews conducted with the fashion market's agents confirmed these findings.

Brazil's fashion is young given its recent history and that's why its identity is still being built (A5, A3). Interviewee A3 states that "Brazil has not as yet developed a stark clear language of what is its fashion in the sense of fashion for what fashion is [...] is still undergoing the development of its identity, of discovering its identity". Corroborating with A3, A2 mentions that "Brazilian fashion is a set of things that characterize Brazil's fashion. I think that in all of them we are still progressing but do believe that advances are in the sense of coining a proprietary design". Likewise, interviewee A6 believes Brazil's fashion has its own identity but that this is evolving whilst Brazil's fashion simultaneously becomes more internationalized.

Analyzing the exposed, one notices that the identity of Brazilian fashion is undergoing a construction process, confirming the findings verified in literature. To understand how the home country's image is being built fashion-wise, the aim was to comprehend which attributes comprise Brazil's image, i.e., the differentiating attributes of Brazil's fashion.

Brazilianism Attributes in Fashion

To comprehend the attributes that comprise COI in Brazil's fashion industry, interviewees were questioned as to their understanding of Brazilianism and how the country's image is reflected by fashion.

It was verified that all of the eight attributes identified in literature – lifestyle, representations and symbols of Brazil, colours, natural raw materials, application of artisan techniques, fabrics, prints, shapes and volumes – were mentioned but only four were indicated by all interviewees and no new attribute emerged from interviews. The most mentioned ones are: lifestyle, colours, prints, shapes and volumes. The attribute representations and symbols of Brazil was also mentioned, but by fewer interviewees and even then, specifically in terms of beachwear and fabrics. Interviewee A1 mentioned the following attributes: colours, prints, national symbols' representations and lifestyle all of which were inferred from the following passage:

Brazilianism in the fashion industry must respect the regional characteristics; it's a lighter, transparent, more colourful fashion that represents a touch of everything; it's not the basic black, the basic grey. Europe is beginning to wear and abuse of colours to face the crisis environment; Brazil explores the cheerful spirit and features the characteristic of prints that are very well employed, the checks; it's influenced by the soap operas, by music, by the artistic manifestations that have tremendous representation in the national identity process.

Five Brazilianism attributes in fashion were mentioned by interviewee A2, namely: colours, national representations and symbols, prints, shapes and volumes and the Brazilian people's lifestyle. Interviewees A3 and A4 mentioned four attributes: lifestyle, shapes and volumes, colours and prints as Brazilianism attributes in fashion. Emphasis was placed on Brazilian print studios being superior to those of Europe and America (A3). Another important aspect that was mentioned by A3 refers to Brazilianism's most relevant attribute being lifestyle. This interviewee believes that via the correct ownership of the Brazilian lifestyle a brand name shall be able to offer tangible and intangible elements through its products.

For interviewee A7, Brazilian fashion is "extravagant, has an attitude, no limits and there are no taboos. Brazilians make their own fashion, Brazilians are not afraid to dress as they please". Thus, A7 and A8 understand that Brazilianism attributes in fashion are represented by: shapes and volumes, fabrics, colours and prints. Both mention that Brazil's beachwear fashion is a reference to them.

Furthering on about Brazil's image in international fashion, interviewee A9 understands that Brazilian fashion is still not understood by the international arena and that final consumers still do not have a formed notion of Brazil's fashion. This interviewee states that it is not simple to understand Brazilian fashion given the diversity and size of the country, reinforcing Lucas's (2010) statements, a scholar who believes that fashion in Brazil is a *mestizo* blend. However, even before the complexity of interpreting the Brazilian fashion industry, A9 mentions that Brazilianism reflects in fashion via: the Brazilian's lifestyle and the prints which, given the colours and representations of Brazil and of national symbols, the interviewee finds very creative. Additionally, A9 states that in beachwear, fabrics also catch the spotlight and that the attribute shapes and volumes is the one that most attracts his clients.

Interviewee A6 understands that Brazilianism in fashion is represented by handcrafts, natural raw materials, colours, prints and by the Brazilian's lifestyle which he perceives as being casual. However, the interviewee mentions that Brazilian fashion is not restricted to the use of

these attributes and believes that the design of Brazil's stylists is creative and must be adapted to what the global consumer demands. He further ponders that Brazilian fashion products must not be a caricature and that on seizing Brazilianism attributes ownership transpositions must be conducted in a non-exaggerated manner so as to not overload the product with information.

It is important to emphasize that other interviewees also mentioned the way Brazilianism ought to be used in fashion so as not transform products into caricatures. A5 states that one cannot stereotype Brazil's identity in the fashion industry and believes that the seizure of Brazilianism must be expressed in a discrete manner conveying Brazil's message with no exaggeration.

Given interviewee comments one notices that there are four Brazilianism attributes in the fashion industry that are more widely acknowledged and most appear throughout interviews, namely: lifestyle, colours, prints, shapes and volumes. Interviewees suggest that the way these attributes must be employed in products and in the fashion brand name's identity is essential so that the Brazilian fashion's product image is not a caricature. A1 refers to the way one ought to transform this ownership of Brazilianism as "this nicer touch of Brazil". To this effect, A3 comments that the company that tries to take its fashion overseas must be very wise when choosing Brazilianism components that meet market expectations so as not to offer a product that has the appeal of a caricature.

Brazilianism attributes in fashion encountered in literature were confirmed by the field survey. However, there is a finding of the empirical research that deserves special mention since it was not identified when literature was revised, namely the way interviewees suggest Brazilianism attributes in fashion should be explored by fashion brand names.

Home country image as a source of competitive advantage

Interviewees indicated that the fashion industry's offering must differentiate itself in the international market ground on some distinctive elements, amongst which rests the country of origin's image. It is the understanding of interviewees that Brazilianism in fashion is growing and understood. When asked about Brazilianism as a source of competitive advantage, emphasis was placed on the belief that Brazil's image may arise as a source of competitive advantage if the Brazil's fashion industry works along the same lines as that of Japan whereby the culture was conveyed to the segment using plain language that the world readily understands. From their standpoint, Brazil can do this since it is a rich, diversified country that is not subject to hostility. Nevertheless, this will only come about if Brazil's fashion agents work their offering allying Brazilianism attributes with design and quality (A1 e A2). The passage that follows illustrates these considerations, namely: "I think that Brazilianism attributes shall be valued; this is what will define a face for Brazil's fashion; using these elements for a globalized concept yet with this differential, featuring this signature whereby people look and say 'Oh! This is Brazilian' " (A2). (A2)

Brazilian fashion's creativity is an element that the international market values. This is why products that leave Brazil must have a very significant creative and innovative component and special attention must be given to avoid exaggerations so that the end result is not a caricaturized offer. Therefore, Brazilianism fashion attributes represent both source and opportunity and must be used as a sustainable competitive advantage on the international front. However, if Brazil does not work its image well, other brand names of other nationalities might take ownership of these attributes and use them in their offers. So, a home country's image in the

fashion industry's context is an important distinctive modality but the fashion offer cannot solely comprise this distinctive element (A3, A4 and A5).

International buyers believe that Brazil's image is important to differentiate fashion industry's offerings since it their clients have expectations in as much as Brazil is concerned given the country's presence in the current global context (A6, A7, A8 and A9). However, Brazil's image in fashion is not fully understood so, in their minds, the fashion product must rest on other differentiating elements and alongside, Brazil's fashion identity should be developed.

As of interviewee speech it is clear that COI can serve as a source of competitive advantage but must not be employed in an isolated manner. Findings also reinforce Giraldi and Tornavoi's (2005) standpoint whereby Brazil's image can be considered an attribute by companies that seek to sell on a cross-border basis and may thus serve as foundation for the structuring of a differentiation strategy for Brazilian products.

Conclusions

The study was developed within the Brazilian fashion industry's context and in general set out to understand which country of origin attributes serve as a source of competitive advantage before the international arena. Research further enabled the pinpointing of attributes that comprise COI within Brazil's fashion context in international fronts and identified which attributes are recognized and valued by market agents. Literature revision and the field survey allowed for the comprehension of Brazil's image and also provided in-depth understanding of the home country image construct within the Brazilian fashion industry's context. Therefore, the study contributed with knowledge on Brazilianism in fashion presenting the following attributes as COI components in this segment, namely: colours; prints; lifestyle; shapes and volumes; Brazil's representations and national symbols; natural raw materials and applications and artisan techniques. Emphasis ought to be placed on the fact that no new attribute was mentioned during the field survey stage.

Amongst mentioned Brazilianism elements results confirmed that the most acknowledged, valued and used by fashion market agents attributes are: shapes and volumes, colours, prints and life style. Fabrics and Brazil's representations and national symbols are also valued and used however not to the same extent as those previously mentioned.

However, one verifies that Brazil's fashion history, the building of its identity and the very insertion process of this segment in international markets are all quite recent. As analysed, Brazil's fashion industry started to coin an identity as of the country's economic opening moves and internationalization advances only started during the following decade (at the end of the 90's) and this is why it is still in the initial stage. Given these characteristics, the international market still doesn't fully understand Brazil's image in the fashion industry's context.

This finding features an important managerial contribution. Both agencies that support Brazilian exports – such as APEX – and entities that back up the segment (ABIT and ABEST) can resort to this finding to develop a communication plan centred on promoting the Brazilianism attributes in fashion that this study pinpoints overseas. This marketing action might strengthen Brazil's fashion industry abroad. To this effect, the study revealed that the home country's image in Brazilian fashion can serve as a source of competitive advantage as long as both Brazil's offering and supporting fashion agents convey an image that the international market is able to fully understand. This is not by any means a simple task since Brazil is a multifaceted country, diverse in its history; a country that features racial blending (Native Indians,

Africans, Portuguese and Immigrants) and features a culture that springs from this blend which would have to be used as a creative repertoire (FREYRE, 2009). This need to develop a Brazilian identity on the international arena was also identified by Mariutti and Giraldo (2013) in as much as the tourism segment is concerned. Their findings recommend *EMBRATUR* resort to directed marketing communication strategies so as to strengthen Brazil's competitive advantage in tourism. The recommendation is that a similar strategy might prove to be an adequate and fruitful fit to obtain competitive advantages in Brazil's fashion industry on the international arena.

The study thus indicated the importance of using home country image attributes as a distinctive element respecting the global customer's expectations but also evidenced that this is not the sole source of competitive advantage and should therefore not be used in an isolated manner. Thus, suggestions include future studies understand the composition of Brazil's distinctive fashion offering on the international market.

Furthermore, observations include the fact that offering agents should take careful ownership of Brazilianism attributes so that offers do not emerge as caricatures. The study manages to identify which Brazilianism attributes arise in the international fashion industry. However, future multidisciplinary studies are recommended involving business administration, identity and country image, Brazil's image and design researchers, in addition to local and international fashion marketing professionals. This recommendation might investigate the alternatives for transposing Brazilianism to fashion so that the offer does not have an artisan appeal or is overloaded featuring too many attributes or conveys a caricaturized image.

Thus, as of findings, it is understood that Brazilianism in fashion may become a source of competitive advantage as of when Brazil manages to build and communicate its image in the fashion industry's context. In this study's sphere, the four home country image attributes that serve as a source of competitive advantage are: lifestyle, shapes and volumes, colours and prints. However, one must keep in mind the international consumer's demands.

In as much as the conceptual implications are concerned, the study contributes with the Brazilianism fashion construct by suggesting differentiating attributes that comprise the country's image in the fashion industry. It also offers contributions by listing poorly studied variables.

The empirical research revealed relevant information and supported the meeting of the study's objective. However one must realise that the exploratory nature, the qualitative approach and the methods herein employed do present limitations. It is widely known that the main purpose of exploratory research is to unveil possible explanations for the fact and that these must subsequently be verified via quantitative studies given the subjectivity of qualitative surveys that rest on beliefs, predispositions and in the researcher's expectations before the theme (SAMPIERI et al. 2006).

The study's first limitation refers to the researcher's bias and preconceived notions, a limitation that was mitigated by intense documental research and literature review. Another limitation relates to convenience sampling so gathered data that the investigation analysed cannot be generalized and the study's suggestions must be limited to the herein researched context.

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ATRIBUTOS DA IMAGEM DO PAÍS DE ORIGEM COMO FONTE DE VANTAGEM COMPETITIVA: ESTUDO NO SEGMENTO INTERNACIONAL DA MODA BRASILEIRA

RESUMO: O estudo buscou compreender quais atributos da imagem do país de origem representam fonte de vantagem competitiva no mercado internacional no contexto da moda brasileira. Levantou-se o referencial teórico relacionado às fontes de vantagens competitivas, à imagem do país de origem, à Brasilidade e aos seus atributos na moda. Realizou-se pesquisa empírica exploratória de abordagem qualitativa. Os resultados sugerem que a imagem do Brasil é entendida pelo mercado internacional da moda em conformidade com os atributos identificados na literatura sobre identidade brasileira. No entanto, (i) na moda, o mercado ainda não tem um conceito formado sobre a imagem do Brasil; (ii) os atributos da Brasilidade na moda podem ser fonte de vantagem competitiva se forem comunicados, compreendidos e promovidos no mercado internacional; por fim, (iii) dentre os oito atributos Brasilidade na moda identificados na literatura, quatro foram destacados como diferenciadores: forma e volumes, cores, estampas e estilo de vida.

Palavras-chave: Vantagem competitiva; Imagem do País de Origem; Moda; Brasilidade

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