

Internationalization Motives and Facilitating Factors: Qualitative Evidence from Smaller Specialist Retailers

ABSTRACT

Drawing on case study evidence, this article explores the reasons small specialist retailers internationalize and the facilitating factors that help them overcome the obstacles to internationalization. The authors employ qualitative research techniques and, to build theory from an unexplored area of research, adopt a multiple-case approach. The findings suggest that though a strong company brand identity is the most significant motive for expansion, other internal and external factors facilitate the international decision-making process.

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A key theme in the retail internationalization literature has been the motives behind international retail activity. An understanding of the process was initially developed in the 1970s, following an increase in international retailing activity by U.S. (Hollander 1970) and U.K. (Jackson 1976) retailers. Initial work in the area drew on observational data. It was not until the 1990s that empirical research tested some of the assumptions that had become accepted within the international retailing literature (Alexander 1990a, b; Williams 1991, 1992a, b), and this led to a reconceptualization of the process and an understanding of the different stimuli that lay behind retail organizations' initiation of international activity (Alexander 1995).

An outcome of this empirical work was the understanding that small-scale specialist retailers that have not fully exploited opportunities in the domestic market and have a strong brand identity are well suited to international activity. This was confirmed in subsequent research by Moore, Fernie, and Burt (2000, p. 925), who found that a proactive interpretation was "the most appropriate when applied to the major fashion design houses" and their international expansion.

Nevertheless, although the literature recognizes that a large-scale operation is not a prerequisite for retail internationalization (Hollander 1970; Vida, Reardon, and Fairhurst 2000; Williams 1992b) and though conceptual frameworks, such as Alexander's (1995), encompass and indeed emphasize small companies' international potential, the reasons these particular firms decide to enter international markets and, in particular, the factors that facilitate internationalization have

*Submitted June 2006
Accepted April 2007*

Journal of International Marketing
© 2007, American Marketing Association
Vol. 15, No. 3, 2007, pp. 96-122
ISSN 1069-031X (print)
1547-7215 (electronic)

not been explored in detail and require focused consideration. The differences between small and medium-sized firms (SMEs) and larger organizations in terms of managerial, financial, and operating characteristics (Hollenstein 2005; McAuley 2001; Shuman and Seeger 1986) suggest that smaller specialist retailers' international strategies potentially differ from those of larger retailers.

The SME literature has developed a body of knowledge that focuses on the key drivers for small-firm expansion in the manufacturing sector (e.g., Hollenstein 2005; Morgan and Katsikeas 1997; Ruzzier, Hisrich, and Antoncic 2006). The findings we present herein contribute evidence of retail international activity to a predominantly manufacturing-based literature. In doing so, this study responds to the call to explore SME international activity on an industry-by-industry basis (Antoncic and Hisrich 2000).

Overall, the current work contributes to existing research in the fields of both international retailing and SME internationalization, in which limited attention has been given to the reasons smaller specialist retailers expand operations overseas. By presenting the findings from a qualitative study of U.K. small specialist retailers with international operations, this article addresses the research question, What are the motives that stimulate and the facilitating factors that support smaller specialist retailers' decisions to internationalize? Because the intention of this study is not to describe but rather to build theory from an unexplored area of research, we deemed a multiple-case approach to be the most appropriate (Collis and Hussey 2003; Eisenhardt 1989; Strauss and Corbin 1994; Yin 1994). Such an approach is in line with recent methodological approaches taken in the SME international literature (Ibeh, Ibrahim, and Panayides 2006; Mort and Weerawardena 2006; Winch and Bianchi 2006) and international retailing research studies that have examined underresearched issues (Doherty and Alexander 2006; Picot-Coupey 2006).

The reasons for internationalization are given various names by different authors in the broader literature, including "initiating and auxiliary forces" (Aharoni 1966), "motives" (Alexander 1995), "triggering cues" (Wiedersheim-Paul, Olson, and Welch 1978), "facilitating factors" (Treadgold and Gibson 1989), "stimuli" (Leonidou 1998), "drivers" (Winch and Bianchi 2006), and "antecedents" (Vida and Fairhurst 1998). For the purpose of this article, the subsequent review of the literature considers the core themes in the international retailing literature related to the reasons behind the decision to internationalize, highlighting existing studies on international specialty retailing when relevant. Subsequently, to focus on the size issues related to the reasons

LITERATURE REVIEW

for foreign market expansion, we follow this discussion with a review of existing studies in the field of SME internationalization.

Early studies (Hollander 1970; Jackson 1976) have documented a range of factors that motivate retail firms to internationalize. Empirical studies by Williams (1992a) and Alexander (1990b, 1995) illustrate the complexity and range of influences on international retail decision making. Treadgold (1988) and Kacker (1985) identify various “push” and “pull” groupings of motives along macroenvironmental and micro-firm-level dimensions. Push factors included, for example, industry competition, economy, legislation, and domestic saturation, and pull factors include, for example, economic and political stability in international markets and the opportunity for profit in the foreign market. However, empirical research in the 1990s suggested that push factors were no longer the primary determinant of international development; rather, a retailer’s own operations and ability to respond to international opportunities for growth were more important factors behind retailer internationalization (Alexander 1990a, b, 1995; Williams 1991, 1992a, b). As a result of this work, it has been recommended that research into the reasons for retailer internationalization must be viewed in terms of internal factors specific to the organization, in addition to external environmental motives (Alexander and Myers 2000; Vida 2000; Vida and Fairhurst 1998).

Existing studies have noted that retailers and, in particular, smaller retailers more often internationalize to exploit a competitive or differential advantage (Simpson and Thorpe 1996; Vida and Fairhurst 1998; Williams 1991). As Burt and Mavrommatis (2006, p. 398) note, “an original concept or a unique and distinctive retail product, is the source of competitive advantage for global retailers.” For smaller specialty retailers with international operations, differentiation is marked by a niche strategy and brand recognition, which focuses on a narrow group of products, a clearly defined market sector, or a specific customer segment (Feigenbaum 1993; Foscht, Swoboda, and Morschett 2006; Pellegrini 1994; Simpson and Thorpe 1996; Tordjman 1994), all of which make it easier to adjust to local tastes across foreign markets (Feigenbaum 1993; Lipow 2002). A strong brand identity as a key differential advantage in the internationalization process is closely associated with specialty retailers in the fashion sector (e.g., Bridson and Evans 2004; Wigley, Moore, and Birtwistle 2005) and luxury market (Fernie et al. 1997; Moore and Birtwistle 2005).

In addition, internal motives related to critical management factors have been confirmed in the international retailing literature (e.g., Alexander and Myers 2000; Hollander 1970;

Moore and Birtwistle 2004; Vida and Fairhurst 1998; Williams 1991). Because managerial perceptions guide decision making, Vida, Reardon, and Fairhurst (2000) contend that decisions for growth in nondomestic markets are not made unless management exhibits positive views with respect to international opportunities and barriers associated with international expansion. This supports the work of Williams (1992b), who finds that if management perceives obstacles as surmountable, smaller retailers can pursue growth-orientated and proactive motives in foreign markets. Therefore, research that specifically focuses on the reasons smaller specialist retailers decide to internationalize and the facilitating factors that support the process is required. The importance of firm-specific motives highlighted in the literature suggests the need for an investigation into the reasons for smaller specialist retailer expansion internationally and, importantly, the facilitating factors that help overcome obstacles to international growth, given the resource restrictions associated with SMEs.

Because of our focus on the effect of size issues on the internationalization of specialist and luxury retailers, it is important to review the broader literature that is specific to SME internationalization. In defining SMEs, it is evident that myriad classification criteria have been used in the literature, such as number of employees, number of outlets, and annual turnover (see, e.g., Masurel 2001). However, although there is a lack of universal agreement on how to define SMEs, there is more consensus in the literature as to their key characteristics (McAuley 2001). Fundamental characteristics have been highlighted in previous studies (Baird, Lyles, and Orris 1994; McAuley 2001), which argue not only that smaller firms are not smaller versions of large firms (Shuman and Seeger 1986) but also that SMEs are different from larger firms in terms of international activities (Hollenstein 2005).

Several theories from the broader international business literature (e.g., stage/process models and resource-based theories) have been applied to empirical research in the field of SME internationalization to explain why smaller firms engage in international operations (e.g., Bilkey and Tesar 1977; Bloodgood, Sapienza, and Almeida 1996). However, although evidence on network-based international activities has challenged traditional theories of internationalization (Hollenstein 2005), research has likewise shown that revolutionary technological, social, and economic changes currently taking place worldwide, together with more sophisticated and skillful managers and entrepreneurs, can propel SMEs into international markets from the outset (McDougall and Oviatt 2000; Rialp et al. 2005). Pertinent to our focus, the following discussion of the literature highlights the key

SME International Literature

motives and facilitating factors pertaining to the internationalization of specialist retailers.

Recent research contends that ownership advantages, defined as “firm-specific characteristics and capabilities that make a firm superior to local competitors” (Hollenstein 2005, p. 438), are the most prominent driver of SME internationalization. Such factors may be related to the uniqueness of a firm’s products or services as “attention evokers” in international markets (Cavusgil 1982; Wiedersheim-Paul, Olson, and Welch 1978), which provides an incentive to initiate foreign market expansion (Douglas and Craig 1992). In particular, previous research has indicated that the proactive pursuit of global niches from the outset is not restricted to SMEs within knowledge-intensive industries but is also evident in the retail and craft sectors (Fillis 2004; Foscht, Swoboda, and Morshett 2006; McAuley 1999; McAuley and Fillis 2005). In pursuing a “niche-based differentiation” strategy overseas (Ibeh, Ibrahim, and Panayides 2006), SMEs may not influence the market explicitly but rather may serve a narrowly defined segment in international markets (Bloodgood, Sapienza, and Almedia 1996; Merrilees and Tiessen 1999). Although this may provide SMEs with the opportunity to internationalize, recent research has also highlighted the role of e-commerce as a facilitator and an enabler of foreign market expansion (Berry and Brock 2004; Foscht, Swoboda, and Morschett 2006; Mostafa, Wheeler, and Jones 2005).

In the literature, the significant role of the founder or entrepreneur in taking up opportunities for international expansion has been well documented (e.g., Bell, Crick, and Young 2004; Boter 2003; Miesenbock 1988; Westhead, Wright, and Ucbasaran 2001). Indeed, more recently, the decision to internationalize has been defined as the entrepreneurial act of a manager (Crick, Bradshaw, and Chaudry 2006). Previous research has highlighted the management factors of competence, international orientation, and global mind-set as key drivers of internationalization (Boter 2003; Calof and Beamish 1995; Chandler and Hanks 1994; Fillis 2001; Nummela, Saarenketo, and Puumalainen 2004). In particular, objective characteristics have been found to predict the SME’s propensity for internationalization (Hutchinson, Quinn, and Alexander 2006), such as the extent to which management has engaged in foreign travel, the number of languages spoken, and whether the decision maker was born abroad or lived or worked in a foreign country (Reuber and Fischer 1997). Ownership and management changes also have an important influence on the international orientation of SMEs and the decision to engage in foreign market activity (Bell, Crick, and Young 2004; Fernandez and Nieto 2002; Hutchinson, Quinn, and Alexander 2006). With regard to

born-global firms, the owner's international experience is a significant factor.

The literature suggests that the social and business networks the decision maker forms are not only potential catalysts for SME international expansion (Coviello and McAuley 1999; Merrilees, Miller, and Tiessen 1998) but also facilitators of the foreign expansion process (Zain and Ng 2006). In particular, strategic networking can overcome internal resource deficiencies (Westhead, Wright, and Ucbasaran 2002), yielding access to knowledge and experience absent within the firm (Rutashobya and Jaensson 2004), which provides the SME with both the opportunity and the motivation to internationalize. The ability to develop networking capabilities and successfully access the appropriate resources at the right time can cause SMEs to leapfrog stages of international development (Rundh 2003). This is particularly characteristic of born-global firms in which the owner/manager displays behavioral characteristics of proactiveness, innovativeness, and risk taking (Mort and Weerawardena 2006). Networking activity driving the decision to internationalize can range from friendship and family links offshore to contacts with business and government organizations (Apfelthaler 2000; Coviello, Ghauri, and Martin 1998). Conversely, previous studies by Holmund and Kock (1998) and Terziovski (2003) have cited participating in international trade fairs, hiring new managerial talent experienced in international business, and communicating with experts outside the firm as key facilitators of foreign market expansion.

Therefore, the current research addresses three fundamental lacunae in the literature. First, as we noted previously, although it is recognized that proactive smaller specialist international retailers are well suited to develop globally relevant international operations (Vida, Reardon, and Fairhurst 2000), the motives that drive these firms to enter international markets have not yet received focused consideration. Second, the factors that facilitate the internationalization of these smaller operations, despite their limited resources, have not been explored in detail and require further attention. Third, the SME literature is dominated by studies on the manufacturing sector. In response to calls in the literature to consider other industries and sectors (Antoncic and Hisrich 2000), we explore the experience of retail sector operations.

Historically, primary research in the domain of international retailing has been predominantly quantitative in nature, employing survey methods (Alexander 1990a; Gibb and Davies 1990). Early work in the field is also characterized by studies that adopt a descriptive case study approach based on secondary evidence (Laulajainen 1991; Sparks 1995).

RESEARCH METHODOLOGY

Although this method is still employed (Burt et al. 2005; Burt et al. 2002; Jackson and Sparks 2005), as the field of international retailing has evolved, there has been an increasing call for (Brown and Burt 1992; Sparks 1995) and recognition of the value of in-depth qualitative techniques, in particular, the case study method based on qualitative, primary sources (Doherty and Alexander 2004, 2006; Moore, Birtwistle, and Burt 2004; Picot-Coupey 2006). Such an approach is also in line with recent studies emerging from the SME international literature (Hollenstein 2005; Ibeh, Ibrahim, and Panayides 2006; Mort and Weerawardena 2006; Winch and Bianchi 2006).

Exploratory case studies based on primary data are deemed to be appropriate when the existing knowledge base is poor (Yin 1994) and when the inductive process of data generation involved in such a method is anticipated to provide a greater understanding and a broader description of process and meaning (Doherty and Alexander 2004). Given the paucity of research on the internationalization of specialist types of retail SMEs and their motivations to move into international markets, we employ such an approach here. Therefore, this study was exploratory in nature and framed within an interpretive research paradigm, employing qualitative techniques and a case study design. The adoption of a qualitative approach provides for a holistic means of data gathering, analysis, interpretation, and understanding that is particularly suited to research that investigates the “why” and “how” of management decision making in organizations (Gummesson 2000; Silverman 1997). Because the multiple-case research methodology is deemed to be more robust than a single case study (Yin 1994), the potential benefits of data richness, depth, and quality compensate for the associated shortcomings of limited representativeness and generalizability (Ibeh, Ibrahim, and Panayides 2006). Therefore, the in-depth analysis of the internationalization decision-making process that smaller specialist retailers exhibit can be used as the starting point for building theoretical propositions (Hollenstein 2005), as we present in our conceptual framework.

Case Selection

As we mentioned in the “Literature Review” section, there is no universal agreement on how SMEs are defined; however, there is more consensus as to their key characteristics (McAuley 2001). Therefore, for the purpose of this study, we selected companies primarily in terms of key SME characteristics in comparison with large multinational retailers. This is in line with the work of Paliwoda and Thomas (1998) in that the most appropriate criteria place a company in the context of its absolute and relative size in the marketplace in which it operates. Therefore, the selection criteria included less well-known retailers based in the United Kingdom with

a small share of the market and limited retail operations in domestic and international markets.

We then selected cases by a purposeful sampling design, which allowed for the selection of “information-rich” cases (Patton 2002) for the detailed study of SME specialist activity in different retail sectors and various stages in the process of internationalization. We conducted the initial investigation using the Corporate Intelligence Group’s (2001) retail-ranking directory and the Internet, which provided information on management structure, market activity in the United Kingdom, and international development of 18 potential companies relevant for this research. At this stage, all SME retailers in the sample displayed a distinct specialist format insofar as they operated in the middle and luxury markets. Moreover, all these retail firms originated in the U.K. market with the head office located in the United Kingdom, operated in at least one international market outside the United Kingdom, and had a sales turnover of less than £24 million (European Commission 2000). From this initial sample, 9 companies agreed to participate in the study (in line with recommendations by Lincoln and Guba [1985] and Eisenhardt [1989]).

The overall aim of the study was to explore the reasons smaller specialist retailers engage in international operations and how that process is facilitated. Several research issues were posed in light of the literature presented to guide the collection of data, as recommended by Eisenhardt (1989) and Gillham (2000); the specific study objectives were as follows:

1. To identify the factors that lead smaller specialist retailers to consider internationalization a viable strategic option,
2. To explore whether the reasons for internationalization are found within (i.e., company or management) or outside (i.e., in the domestic/foreign market) the firm, and
3. To explore the operational factors (internal and external to the firm) that facilitate the move overseas.

We employed two fundamental aspects of case study research in the collection of data from the nine case companies in this study: interviews (with senior personnel responsible for the international decision-making process in their respective companies) and company documentation (company histories, press releases, advertising and marketing material, and product-market strategies). We conducted qualitative, “open-ended,” semistructured interviews (Gillham 2000) with “elite informants” (i.e., personnel with sen-

Data Collection

ior positions) in the case companies. Our research issues identified several common components that needed to be addressed to fulfill the aims and objectives of this study, but the open-ended style of interview permitted the respondents to describe what is meaningful and salient in their companies' internationalization process without being limited to standardized categories (Patton 2002). The duration of each interview extended to 90 minutes. In addition to interview data collection, we collected documentary evidence, which has been viewed in the literature as a rich source of insight (Adam and Healy 2000), from the case companies to supplement the evidence from interview transcriptions.

Data Analysis

The qualitative analysis of data followed an inductive process and observed the recommendations of both Morse (1994) and Lindlof (1995). To analyze interview transcriptions, we implemented content analysis, which in this study refers to the searching of text for recurring words, themes, or core meanings (Patton 2002); this is similar to Strauss and Corbin's (1998) "open coding." Throughout the duration of the study, data analysis went hand in hand with data collection to allow for the emergence of important themes and patterns in the data. The use of different data methods (i.e., interviews and documentation) verified the consistency of the information collected on the company (Patton 2002), which allowed for the early analysis of themes, reflecting a triangulated approach in which the theory is continually supported (or contradicted) by evidence from different groups (Hartley 1994, 2004). The framework we present in the "Discussion" section is based on the findings of this study. The framework is an important element of case study methodology (Creswell 1998); that is, the development of a theoretical framework that informs and enriches the data provides a sense not only of uniqueness of the case but also of what is of more general relevance and interest (Hartley 1994). Furthermore, tying the emergent theory to existing literature enhances the internal validity and theoretical level of theory building from case studies (Eisenhardt 1989), which is basic to research integrity (Gillham 2000).

We now present the findings from the nine case studies. We codified firms according to alphabetical letters (i.e., A, B, C, D, E, F, G, H, and I) to preserve confidentiality. We first provide the background profiles of each case company before our analysis of the findings. We use selected quotations from case informants to facilitate the analysis because we believe that they best reflect the phenomenon under investigation (Coviello, Ghauri, and Martin 1998).¹

FINDINGS

As we stated in the "Methodology" section, all case companies in the initial and chosen sample displayed a distinct specialist format and operated in the middle and luxury mar-

kets. The specialty characteristics of these smaller retailers are demonstrated by a strong emphasis on gift and accessory merchandise and the types of market sectors in which the case companies operate:

- Beauty and cosmetics: Companies C, D and E;
- Clothing and accessories: Companies A, B, H, and I;
- Jewelry and gifts: Companies F and G; and
- Sports and leisure: Company H.

Likewise, we found that these smaller specialist retailers had a strong luxury (Companies A, B, C, E, F, G, and H) or middle-market (Companies D and I) appeal to customers in the domestic and international markets, identified by their brand and range of merchandise. According to the description that individual company respondents gave, the companies included in this study extend across a continuum, from a position at the high-priced luxury end of the continuum to a more moderately priced, middle-market position at the other end of the continuum. To provide a demographic profile of the nine specialist retailers before we present the findings, Table 1 exhibits the finer details of the companies in the sample by turnover, number of stores in the United Kingdom, age, ownership status, years of experience overseas, number of foreign countries, and entry mode employed overseas.

As Table 1 shows, there is a broad spectrum of companies included in the study in terms of size, age, experience, and process of internationalization. This table highlights the change in ownership in the cases of Companies A, B, C, E, and H. Company H was the only case in which international expansion occurred as a direct result of the parent company; as for the other cases, a presence in international markets had been established before the change in ownership, and the acquired funds, knowledge, and networks of the parent company often promoted continued internationalization. The following subsections present the key factors that influenced the smaller specialist retailers' decisions to internationalize.

The findings revealed that the brand identities of nearly all the specialist retailers in this study (with the exception of Companies D and I) are linked to the product, image, and market appeal of the company and feature a strong emphasis on luxury along with a distinct British/English image. As one respondent noted, "luxury is the focus of the company; the three key points of the [Company B brand in the United Kingdom and overseas] are luxury, English, and aspira-

Company Brand Identity

Table 1.
Domestic and International
Profile of Cases

Company	U.K. Turnover (£m)	Number of U.K. Stores	Age of Company (Years)	Parent Ownership	Years Overseas	Number of Overseas Countries	Entry Mode Overseas
D	5.7	22	21	No	13	17	Franchising, wholesale
E	6.5	14	135	Yes	12	10	Retail stores, wholesale, joint venture
H	8.2	3	166	Yes	10	2	Retail stores
F	10.8	4	25	No	2	2	Wholesale
I	11.5	32	47	No	32	3	Retail stores, franchising
G	12	16	11	No	5	10	Retail stores, franchising
A	18	20	150	Yes	60	29	Licensing, wholesale
C	22.3	34	36	Yes	25	30	Retail stores, wholesale, franchising
B	25	10	36	Yes	25	21	Retail stores, wholesale, joint venture

tional.” A clearly defined brand identity created in the domestic market not only triggered expansion for these smaller specialist retailers but also remained the driving force behind international expansion: “We have an ambition to take the brand global” (Company G).

These retailers experienced the strong pull of certain markets in the initial phase of their internationalization, a pull generated by the intrinsic qualities associated with the brand identity of the company. These have often been market of origin and luxury-based values that have complemented and enhanced each other in niche market locations in which customers experience reinforcement of the brand values. Indeed, from the qualitative data we collected, it was evident that for all the companies in this study, a clearly defined brand identity carved out niche opportunities, “which is appreciated right across the globe” (Company D).

In the cases of Companies B, C, F, G, and I, we found that the vision of the entrepreneur or founder and his or her individual characteristics were a key reason the firm first decided to expand operations from the domestic market into international markets. The characteristics of the decision maker, expressed through the company ownership structure, influenced the initial decision to internationalize. The role of the decision maker and his or her personality and background characteristics influenced the decision to expand overseas: “[The founder’s] whole background is abroad;... he was brought up all over the place and so has a wealth of experience of being in different countries” (Company F).

It is evident that the move overseas by the specialist retailers in this study was influenced not only by the individual character and risk-taking nature of the people who founded these companies but also by how the orientation toward international markets, derived from experience and knowledge of different countries, provided the conditions for foreign market expansion. Indeed, the personal contacts of the founder or decision maker forged in certain foreign markets as a result of living and working abroad were also facilitators of expansion for some retailers into new international markets. For example, Company I moved into the Netherlands as a result of the founder of the company having friends who lived in the market at the time.

The findings from this study show how five companies (A, B, C, E, and H) experienced a recent change in ownership (less than five years ago) that had a significant impact on firm decisions pertaining to international expansion. As we previously stated, Company H is the only case in which international expansion occurred as a direct result of the parent company; as for the other cases, a presence in international

Decision-Maker Characteristics

Parent-Firm Initiative and Advantage

markets had been established before the change in management: “You can branch out and attempt and try new things when you’ve got Big Daddy as a resource” (Company H). For companies that were already international, funds, knowledge, and networks acquired from the parent company were important and emphasized by the companies in the study, but significantly, the parent company relationship also allowed the companies to be more ambitious internationally: “What we also got was the parent company’s geographical experience that allowed us to develop the Far Eastern markets” (Company C).

Networks

For all the companies in this study (except Company G), the role of business and government was important in facilitating and supporting the international expansion of business operations. Business networks and government assistance are important to smaller specialist retailers in terms of influencing the choice of market and providing the necessary support for ongoing international business operations: “Italy is a prime example; we have an agent whose family has known us for 50 years; we have up to 200 accounts in Italy, so we need someone to service that locally” (Company A). In particular, we found that for the majority of companies, the ability of management to network more formally with agents, designers, and business contacts proved significant in the development and support of overseas operations. Companies found that government bodies, such as “the [Department of Trade and Industry] and people like that come in very handy” (Company E).

DISCUSSION

The findings from this study yield important insights into the reasons smaller specialist retailers expand beyond the domestic market and into new international markets. Indeed, it is argued that the in-depth qualitative case study analysis, which captures the internationalization decision-making processes exhibited by smaller specialist retailers, provides a starting point for building theory in this area of the literature. Figure 1 illustrates the relationship between the motivating and facilitating factors that influence smaller retailers’ decisions to internationalize, as indicated by the findings that emerge from this study.

Although previous research has shown that company characteristics influence the motivations behind international expansion, the findings we present here emphasize the importance of the facilitating factors that provide a context for the motivation to internationalize. As Figure 1 illustrates, these facilitating factors have three sources: internal, external, and parent advantage. They support the most significant motivating factors for internationalization for the smaller specialist retailer group considered here—that is, company

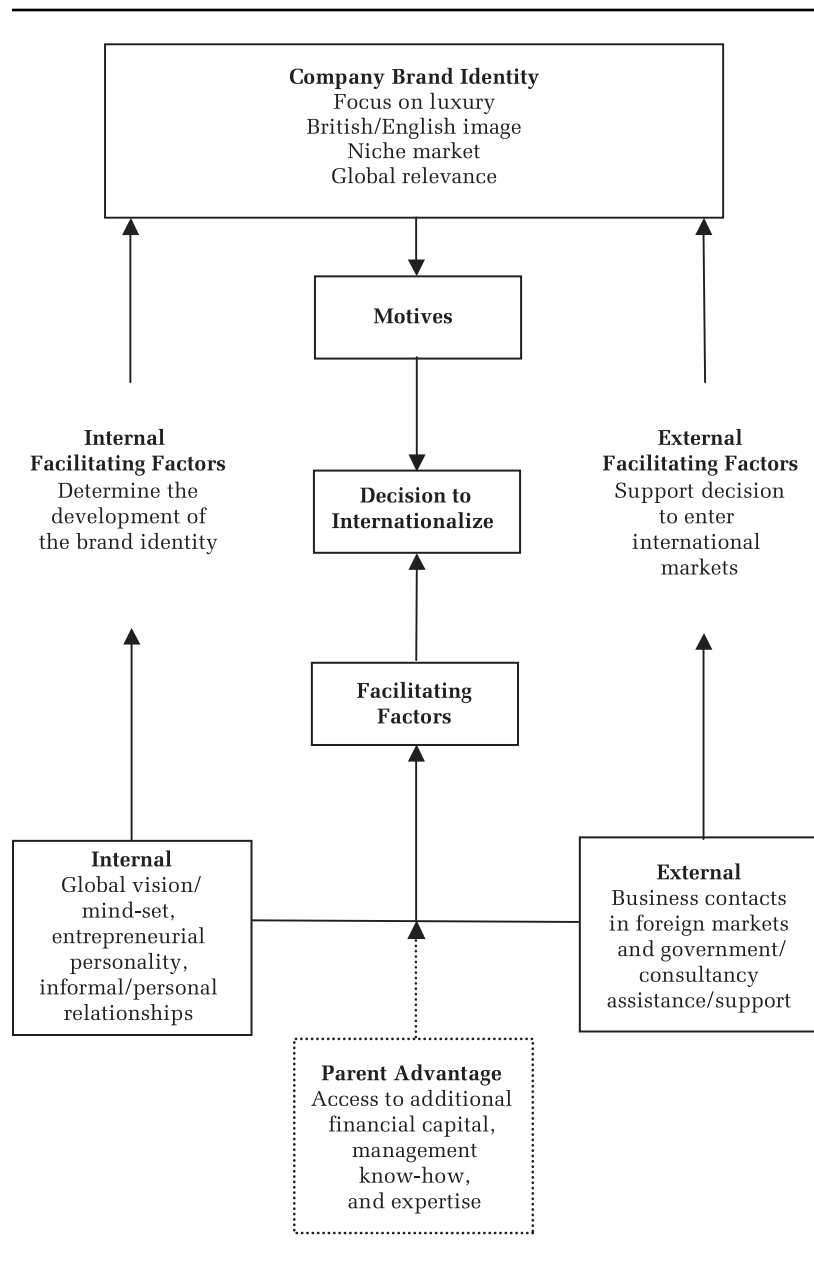


Figure 1.
Decision to Internationalize

brand identity as expressed by a focus on luxury, a British/English image, niche attributes, and global relevance.

Therefore, although the company brand identity represents a crucial antecedent for international expansion, we found that the decision to internationalize also depends on key facilitating factors. For smaller specialist retailers, we found that internal facilitating factors determine the development of brand identity; these include a global vision/mind-set, entrepreneurial personality, and the founder's informal/personal relationships in foreign markets. Likewise, we found that external factors support the decision to internationalize; these included business contacts in foreign markets and government/consultancy assistance and support.

An additional feature facilitating the decision to internationalize was a change in ownership by a parent company, which provided access to additional financial capital, management know-how, and expertise.

Company Brand Identity

For the smaller specialist retailers in this study, the company brand identity was a key trigger for international activities. It led the company to take a proactive decision to respond to foreign market opportunities. For the majority of specialist retailers, the brand identity was linked to the luxury product, image, and market appeal of the company. The desirability of the luxury English or British brand and the attractiveness of this offer within the global market were key reasons for deciding to enter a new market. At the other end of the market spectrum, this study included specialist retailers (Companies D and I) that focus on a niche market segment and original lifestyle concept with affordable middle-market brands. This profile also created opportunities for expansion into foreign markets.

The findings show that the company brand identity is the platform on which these smaller specialist retailers have developed a niche opportunity in international markets. These findings are compatible with a theme in the retail literature that indicates the importance of motives derived from an internationally appealing concept and brand and from distinctive product features (Alexander 1990a, b, 1995; Bridson and Evans 2004; Burt and Mavrommatis 2006; Williams 1991). With reference to the SME literature, this may be viewed as proactive internationalization (McAuley 2001; Westhead, Wright, and Ucbasaran 2002), stemming from within the organization (Hollenstein 2005) and linked to the firm's interest in exploiting unique opportunities in the global market. In particular, the companies in this study reflect to some extent the international retailers ("smaller in size") researched by Simpson and Thorpe (1996), who highlight the product, lifestyle, image, and niche of elements of specialty retailing. This also confirms research on SMEs that suggests that companies of this type are often concentrated in sectors that serve a narrowly defined segment (Foscht, Swoboda, and Morschett 2006; Ibeh, Ibrahim, and Panayides 2006; Merrilees and Tiessen 1999; Papadopoulos 1987) and use a distinct set of qualities, which enables them to compete with larger organizations despite resource limitations.

We found that for some of the specialist retailers in this study, the global appeal of the luxury brand stimulated the decision to internationalize. The exclusive merchandise and luxury appeal of the specialist retailer brand was generically "international," requiring only small changes to meet the special tastes of individual markets. Essentially, this was the result of a unique image stemming from the "Britishness" of

the offering (Alexander 1988; Moore 1995), especially in the case of luxury and upscale retailers, which often trade internationally on classic design and English or British associations (Alexander and Myers 1999). This strategy is characteristic of marketing differentiation—that is, the marketing approach used to position merchandise (Almeida, Sapienza, and Hay 2000).

These specialist retailers possessed a “brand without boundaries” (Moore, Fernie, and Burt 2000) that stemmed from brand values and images that have global appeal (Fernie, Moore, and Lawrie 1998). Such retailers operate in niche markets in which customers have similar tastes in transcultural goods (Bloodgood, Sapienza, and Almeida 1996; Rundh 2001; Tordjman 1994) and that require little adaptation in development of international operations (Moore 1995). With reference to the work of Alexander (1995), we argue that retailers that operate in niche markets, bound by a local culture and appeal to an international global segment, are internationally relevant from inception, thus enabling these firms to internationalize early in their development. This pattern of early internationalization that several companies in this study exhibited reflects to some extent the “fast-moving” or “born-global” SME (Bell et al. 2001; Lefebvre, Prefontaine, and Lefebvre 2003), confirming that the proactive pursuit of global niches from the outset is not restricted to SMEs within the high-tech industry and characterizes the international decision-making process of some retailers (Foscht, Swoboda, and Morschett 2006).

The findings from this research reveal that internal factors within the firm, including the global vision/mind-set, entrepreneurial personality, and informal/personal relationships, determine the development of the company brand identity, which in turn facilitates the retailer’s decision to internationalize. The evidence we presented in this study comes as no surprise, given the emphasis on the role of the founder or decision maker in both the international SME and the retailing literature streams (e.g., Bell, Crick, and Young 2004; Boter 2003; Miesenbock 1988; Westhead, Wright, and Ucbasaran 2001). For some smaller specialist retailers, given the role of key personnel in initiating the international expansion of the company, it may be concluded that the internationalization decision-making process is the entrepreneurial act of the owner/manager (Crick, Bradshaw, and Chaudry 2006). In particular, the owner’s entrepreneurial vision and international orientation was a strong theme that emerged from the findings. This confirms the work of previous studies by Jones and Coviello (2005), Nummela, Saarenketo, and Puumalainen (2004), Rialp and colleagues (2005), Vida, Reardon, and Fairhurst (2000), and Williams (1992a).

Internal Facilitating Factors

We found that the international experience of the founder or decision maker had a significant impact on creating an awareness of international markets and opportunities, which propelled some of the retailers into international markets early in the development of the business. This activity of smaller specialist retailers reflects to some extent previous studies in the field of SME internationalization, particularly those related to the expansion process of born-global firms (De Clerq, Sapienza, and Crijins 2005; Gleason, Madura, and Wiggernhorn 2006; Jones and Coviello 2005). Although this study confirms the role of the founder or key manager in international decision making, the findings also suggest a strong link and dependency between management factors and market choice (Alexander and Myers 2000; Bell et al. 2003; Vida and Fairhurst 1998). In particular, the founder's experience of living or working abroad enabled him or her to build personal relationships in different countries, which proved strategically important in the choice of foreign market. Although studies in the SME international literature place a greater emphasis on formal networking (e.g., Rutashobya and Jaensson 2004; Westhead, Wright, and Ucbasaran 2002; Zain and Ng 2006), we conclude that for smaller specialist retailers, informal relationships (formed as a result of family or friends) facilitate the decision to internationalize.

External Facilitating Factors

We found that external factors, including business contacts in foreign markets and government/consultancy support, also facilitated the international decision-making process for smaller specialist retailers. The role of business contacts in the decision to internationalize, while confirming findings from studies in the international SME literature (e.g., Apfelthaler 2000; Coviello, Ghauri, and Martin 1998), yields new insights into the motives for internationalization in the field of international retailing, in which factors related to the resourcing of information and the impact on foreign market decisions have not been investigated (cf. Vida, Reardon, and Fairhurst 2000). This may reflect the study's focus on the issue of retailer "size"; as Vida, Reardon, and Fairhurst (2000) point out, smaller retailers, in addition to larger retailers, may form contacts with other firms to yield access to knowledge and experience absent within the firm.

The majority of specialist retailers in this study emphasized the importance of accessing information on foreign markets from external organizations to facilitate the international decision-making process. Such organizations included agents in foreign markets and government and consultancy organizations in the United Kingdom and overseas. Previous studies have also noted that this access to vital information through strategically relevant organizations is a compelling force behind SME internationalization (Bell et al. 2001;

Rutashobya and Jaensson 2004; Terziovski 2003; Zain and Ng 2006).

We found that the acquired funds, management knowledge, and expertise that a parent company provides were significant in facilitating the overseas expansion of five companies in this study. For the majority of these companies, a presence in international markets had been established before the change in management, whereas for one company (Company H), international expansion occurred for the first time as a direct result of the parent company. In Figure 1, this feature of smaller specialist retailer internationalization is positioned between the internal and the external facilitating factors by a box in dashed lines, indicating how parent ownership may provide an advantage in the process of internationalization for some companies.

This factor is an important finding in light of existing knowledge in both fields, which does not make explicit the role of change in ownership and the injection of capital that provides the resources to increase international activities. Although existing studies in the field of SME internationalization refer to the change in ownership by SMEs as a critical incident in the process of foreign market expansion (e.g., Bell et al. 2003), the role of parent takeover in international retailing has received little attention in the literature (cf. Fernie, Moore, and Lawrie 1998; Moore and Birtwistle 2005).

This study found that the funds, knowledge, and networks injected into smaller specialist retailers are an advantage in both the initial and the latter stages of internationalization. However, although we found that this activity is particularly characteristic of luxury retailers (see Moore and Birtwistle 2005), parent ownership compromises the SME definition. Given the change from private to parent ownership, it may be more appropriate to define these smaller retailers as “SMEs in transition.”

It is recognized within both the international retailing and the international SME literature streams that the motives for internationalization are many, complex, and often specific to the experience of individual firms (Moore, Fernie, and Burt 2000; Rundh 2001; Treadgold and Davies 1988). Therefore, the findings from this study do not purport to be generalizable, but rather, they reflect the individual and specific nature of the motives (Alexander 1990a, b; Williams 1992a) and facilitating factors (Clarke and Rimmer 1997) behind the internationalization of smaller specialist retailers. Figure 1 represents an important theoretical contribution to the existing knowledge in the fields of international retailing and SME internationalization. Within this framework, the nature of the factors motivating international activity by the retail-

Parent-Firm Advantage

CONCLUSIONS

ers considered here reflects a proactive approach as opposed to a reactive response to internationalization. Thus, in line with Alexander's (1995) definition, proactive internationalization focuses attention on the importance of international opportunities and the retailer's willingness and ability to exploit such opportunities before domestic saturation forces the retailer to consider operating in international markets.

Given that the key motive for internationalization is related to company brand identity with associated connotations of luxury product image, market appeal, original lifestyle concept, niche market opportunities, and global relevance, such factors may also be viewed as differential advantages and key promoters of international activity in both the initial and the subsequent phases of expansion, as Vida and Fairhurst (1998) suggest. However, this empirical study also found that these reasons were not sufficient for successful foreign market expansion but were dependent on several facilitating factors, which provided the firms considered here with the necessary resources to make internationalization a strategic reality, as Leonidou (1998) suggests. Although facilitating factors are highlighted in the international retailing literature (e.g., Clarke and Rimmer 1997; Treadgold 1990), the facilitating factors identified in this study yield new insights relevant to smaller specialist retailers.

Research on SME retailer internationalization is at an early stage of development. This article addressed a previously underdeveloped area of research within the domains of international retailing and SME internationalization. Several themes emerging from the findings require additional exploration—for example, the issue of parent company ownership, the role of the entrepreneur/founder, and the role of personal networking in the international decision-making process. Exploration of these issues would undoubtedly provide important insights into a neglected area of international retail study and would serve to develop further the body of knowledge on SMEs in general.

NOTE

1. Verbatim quotations are available from the lead author on request.

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