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**Rural Industries Research and
Development Corporation**

Marketing Venison Products

**Trademark and country-of-origin
influences and effects**

**A report for the Rural Industries Research and
Development Corporation**

by Suku Bhaskaran

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Foreword

The Australian deer industry is based primarily on breeding temperate deer species (fallow, red deer and elk) for production of velvet antler, venison and venison co-products. The industry has a strong export focus with about 80% of production being marketed into Asian and European countries. Despite strong competition in export markets, RIRDC believes there is significant potential to develop export markets and that the industry should aggressively target export markets. This report was commissioned as a review of past COO studies in order to scope and evaluate the potential to undertake venison export marketing programs that emphasise the product's Australian origin and thus its differentiating attributes such as quality, safety, authenticity and concern for animal welfare.

This report reviews more than 100 studies on country-of-origin (COO) labelling, COO trade marks, customer beliefs and behaviour (consumer and business buyers) regarding products from different source countries and issues surrounding COO marketing initiatives. The review indicates that, even though more than 700 studies on COO beliefs and customer behaviour have been completed in the last 40 years, there are very few product-market specific studies on red meats and more specifically on venison. The review canvasses that there are serious contextual and methodological limitations in several past studies and, therefore, the findings of several past studies may not be wholly reliable. However, notwithstanding the limitations, COO based marketing initiatives could provide competitive advantages and deliver beneficial outcomes in some countries and in some market segments. The report recommends that the Australian venison industry should undertake product-market specific COO studies to determine the opportunities and the strategies that would be appropriate to develop sales into different countries and into different market segments in these countries.

This project was funded from RIRDC core funds which are provided by the Australian Government.

This report is an addition to RIRDC's diverse range of over 1500 research publications. It forms part of our Deer R&D sub-program which aims to improve knowledge and understanding of current markets for venison and venison co-products and develop strategies for future market development appropriate to the current market situation.

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Executive Summary

In the last 40 years nearly 700 studies have been completed on the theme of country-of-origin (COO) beliefs and COO effects on customer behaviour. However, there are very few studies on food products, even fewer studies on red meats and hardly any major studies on venison. There is an obvious gap in knowledge on COO effects on purchase decisions for products such as venison.

Further, past studies have focussed on consumers (as opposed to the food service industry and food processors) and, generally, on overall COO beliefs and behaviour rather than product-market segment beliefs and behaviour. Therefore, there is need to undertake product-market segment specific COO studies.

The review in this report also indicates that there are serious contextual and methodological shortcomings in many extant COO studies. Given the methodological and contextual shortcomings identified in past studies, it is important that COO studies on venison should clearly substantiate the reasons for the choice of research context and research methodologies including matters such as sampling frame used, sample selection methods, survey techniques and data analysis techniques.

Notwithstanding the limitations in past studies that were canvassed above, past studies contain information that would be useful and relevant in developing COO based strategies for export-marketing venison. The following is a summary of relevant information obtained from the review of past studies:

- COO beliefs provide a halo effect when consumers evaluate products and therefore COO beliefs can influence buyer beliefs and purchase intentions
- Customers use COO cues in purchase decision making when other cues are not readily available to evaluate products or when other cues are not readily understandable
- COO beliefs are highly contextual. COO beliefs are contingent upon product category and product line, product history, customer variables, relationship-related variables etc
- COO beliefs are not static and continually evolve and change over time because of externalities such as product specific health scares or information on health attributes. As a result, positive COO beliefs alone will not provide sustainable competitive advantages
- Effective communication of COO advantages is critical to maintaining competitive advantage arising from positive COO beliefs
- COO beliefs can be used to differentiate product offerings and has to be used in conjunction with other marketing strategies including supply chain and marketing mix strategies
- Positive COO beliefs can arise from national/cultural affiliation and this can be a competitive edge in export markets that have national/cultural affiliations to Australia
- Positive COO beliefs can be used to develop brand images and beliefs. However, it seems that where there are already strong brands, brand images generate stronger customer beliefs than COO beliefs. Therefore, the Australian industry needs to take cognisance of the potential threat from international brands and international marketeers.

1. Introduction

The report reviews extant studies on country-of-origin (COO) labelling and trade-marks, customer behaviour (consumer and business buyers) and responses to the use of “Produced in/Made in/Manufactured in/Assembled in ...” labels, and customer behaviour (consumer and business buyers) and responses to the use of distinctive trade marks that use the country/region of production/manufacture as a marketing tool. In the last 40 years more than 700 studies have been completed on COO effects on customer beliefs, influence on purchase decision making, purchase behaviour and on the use of distinctive COO trade marks and logos in marketing initiatives. (Papadopoulos and Heslop, 2002). This report reviews 114 publications that are major and recent studies on the subject. Thirty-two of the articles discussed in the report were published in the last five years (2000-2004). Thirty-four articles were published between 1999-1995. Thirty articles were published between 1994-1990. Eleven articles were published between 1989-1985 and the remaining seven articles pre-date 1985.

There are only a few studies that specifically explore COO beliefs on venison or more generally COO beliefs regarding red meats. Because of this limitation, findings from other studies would be used to postulate possible effects on venison and venison products. In the case of venison and generally all meat products COO attributions and beliefs tend to be complex. COO attribution can, for example, mean ‘full’ origin (animal born, raised and slaughtered in a specified country) or it can mean where the animal was born or raised or slaughtered or ‘finished’ (Davidson, Schroder and Bower, 2003). Issues regarding COO attribution and definition (other than discussions on hybrid products) are not explored in this review because this review concentrates on COO based customer beliefs and purchase behaviour.

2. Discussions

Research Context and Sampling Frame Effects

Past studies have used different study contexts and methodologies to evaluate, measure and analyse COO beliefs and effects. Some examples of the widely different contextual basis of past studies are as follows:

- (a) Overall country image on COO beliefs and behaviour (Reiersen, 2001; Aaker and Maheswaran, 1997)
- (b) COO beliefs and behaviour on goods produced, manufactured or assembled in different countries (Thekor and Pachetu, 1997; Haubl, 1997; Gurhan-Canli and Maheswaran, 2000)
- (c) COO beliefs and behaviour regarding hybrid products where, for example, raw materials originate in one country, manufacturing, assembly, marketing and R&D occur in other countries (Schweiger, Otter and Strebinger, 1997; Batra, Ramaswamy, Alden, Steenkamp and Ramachander, 2000)
- (d) COO beliefs and behaviour for different products from one country (Papadopoulos, Heslop and Beraca, 1990; Okechuku, 1994; Klein, Ettenson and Morris, 1998; Mohamad, Ahmed, Honeycutt and Tyebkhan, 2000)
- (e) COO beliefs and behaviour for different products and product categories from different countries and countries at different stages of economic development (Cordell, 1991; Kaynak and Cavusgil, 1983; Keown and Casey, 1995)
- (f) COO beliefs and behaviour arising from purchase occasion, for example as gift items or for use during special occasions (Amine and Shin, 2002)

Past studies also use widely different samples and offer little or no explanation of the reasons why the sample and the sample selection is appropriate for the study. The following are some examples of different sampling frame choices in past studies:

- (a) Consumers generally (Bilkey and Nes, 1982; Hooley, Shipley and Krieger, 1988; Lawrence, Marr, Prendergast, 1992)
- (b) Segments of the consumer market (Wall, Liefeld and Heslop, 1991; Meyers-Levy and Maheswaran, 1991; Lee, Kim and Miller, 1992; Usunier, 1994; Schaefer, 1997)
- (c) Professional purchasing managers/buyers in industrial markets (Ahmad, Astous and El Adraoui, 1994; Ahmed and d'Astous, 1995; Quester, Dzever and Chetty, 2000)
- (d) Sales staff in retail stores (Torelli, Lim and Ye, 1989)
- (e) Managers in producer organisations (Beverland and Lindgreen, 2002)
- (f) Students as proxy for target consumers (Amine and Shin, 2002)

The results of using different study contexts (including different sampling frames) and methodologies appear to have contributed to widely differing and sometimes even conflicting findings. The review provides some examples of how study context and methodology impacts on findings. In the case of several studies, the justification for the study context and methodologies used are not clear and often questionable and as a result the findings of several of these studies would need to be challenged.

Sampling frame effects on findings is clearly demonstrated by D'Astous and Ahmad (1999). D'Astous and Ahmad analysed COO beliefs of sales personnel and customers of electronic goods sold in a retail outlet. Responses from the sales personnel interviewed indicated that COO is the least important attribute that consumers consider in their product choice decisions. The sales personnel believed that customers prioritise price, brand reputation and warranty in a sequential order of importance. On the other hand, interviews with customers revealed that COO was a critically important consideration in their purchase decisions. D'Astous and Ahmad attribute the contradicting findings based on customer

surveys and survey of sales personnel to the specialist product knowledge of sales personnel. According to D'Astous and Ahmad at the point of purchase, customers do not have information on COO and, therefore, intuitively use brand names as a proxy for COO attribution. Notwithstanding the reasons for the differences in the responses across the two groups, the findings clearly demonstrate the manner in which sampling frame selection can influence survey findings. Unfortunately, as shown in the next example, this point appears to be overlooked in a number of COO studies that were reviewed.

A glaring example of sample selection effects on findings and of even greater concern not highlighting the possible sample induced effects on findings is Quester, Dzever and Chetty (2000). Quester *et al.* analysed COO beliefs of professional purchasers in Australia and New Zealand in regard to equipment and component parts originating from 17 countries. The Quester *et al.* study was based on a mail survey of members of the Association of Purchasing Agents in Australia and New Zealand. The study does not provide any information on the respondents. It appears that, because the sampling frame comprised all members of the Association of Purchasing Agents, the respondents could very well not have been the target or potential market. Could, for example, the respondents have included supermarket purchasers of fruits and vegetables? If this were the case, the results and conclusions of the study would be totally irrelevant.

It is evident from the two examples provided that the sampling frame for the research should be identified carefully and the reasons for the choice of the sampling frame should be justified. Unfortunately, issues of sample selection and research techniques appear to be an overarching weakness in a large number of COO studies.

Research Methodology Effects

Past studies also adopt a wide range of research and experimental techniques. The following are some examples of methodologies used in past studies:

- (a) Single-cue studies where COO was the only information provided to survey participants (Etzel and Walker, 1974; Narayana, 1981)
- (b) Multi-cue list format where several attributes such as price, quality, brand name, warranty, comparison with other brands etc are provided to survey participants (Zhang, 1996; Peterson and Jolibert, 1995; Johansson, Ronkainen and Czinkota, 1994)
- (c) Multi-cue advertisement format where in-addition to multi-cues, advertising messages are also shown to survey participants (Lim and Darley, 1997)
- (d) Single country versus cross national studies (Jaffe and Martinez 1995; Ahmed and D'Astous 1999)
- (e) Prior product experience versus post consumption experience (Tse and Gorn 1993)
- (f) Case study analysis (Kleppe, Iversen and Stensaker, 2002; Beverland and Lindgreen, 2002)

Several studies conclusively show that where single cue method is used, respondents tend to overemphasise COO influence on purchase decisions (Peterson and Jolibert 1995; Verlegh and Steenkamp 1999) and this could lead to misleading conclusions. Lim and Darley (1997) investigated the effects of using different research techniques on investigations into customer COO beliefs and behaviour. Lim and Darley examined the outcomes from invoking single cue, multi-cue list and multi-cue advertisement techniques under three conditions (hetero-method application, non-experiment and post experimental enquiry). Their findings show that single cue and multi-cue list methods generated somewhat similar results under hetero-method application, non-experiment and post experimental enquiry. However, clearly different responses were recorded under all three conditions when multi-cue advertisement technique was used. Lim and Darley's findings demonstrate the effects of using different methodology on COO research findings.

Conclusions in COO studies demonstrate two diametrically opposite positions. One group covering Nagashina (1970) to the current period concludes that COO beliefs substantially influence buyer beliefs and behaviour. In fact, according to Laroche, Papadopoulos, Heslop and Bergeron (2002)

effects of COO beliefs have been conclusively established in studies covering a variety of subjects and through using a variety of methodology. Another group (Lim and Darley, 1997; Liefeld, 1993; Ettenson, Wagner and Gaeth, 1998; Johansson, Douglas and Nonaka, 1985) conclude that COO induced customer beliefs and behaviour has not been established. Lim and Darley contend that past studies may have overstated COO effects on customer beliefs and behaviour and attribute study results to shortcomings in methodologies used. According to Liefeld even if COO may have perceptual impact, COO is not a high-order influencer of consumer choice decisions. As such, notwithstanding their COO beliefs, customers would make buying decisions that are not in any way based on COO beliefs.

In the case of venison products, both methodological and contextual issues need to be carefully evaluated. Study context including sampling frame selection and research methodology appear to have compromised the findings in past studies. In the case of venison products, one needs to, for example, consider whether to survey existing customers, target consumers, potential importers, purchasing executives in retail outlets, chefs in restaurants or patrons of restaurants etc. In planning the research and experimental method, issues such as comparison with substitute products including other meat products and game meat versus farmed venison, products from other sources of imports, comparison with other brands, imported products that are packed locally, effects of advertising and other modes of communication with customers, effects on different segments of the market because of variables such as ethnicity, religion, age-class, income, culture, supply chain effects etc would all have to be considered.

The next part of this paper discusses issues that have been considered in past studies, the conclusions in past studies and the relevance of the findings of past studies for a research project on COO beliefs and effects on venison imported from Australia.

National Stereotyping Effects

A large number of studies, especially early studies (Bilkey and Nes, 1982; Hooley, Shipley and Krieger, 1988; Lawrence, Marr, Prendergast, 1992) have focussed on COO induced effects on overall customer beliefs and attitudes. The conclusion of these studies was that COO based product perception was the outcome of customer perspectives of the source country's economic and political maturity, historical events and relationships, traditions, level of industrialization and economic development, and the degree of technology virtuosity (Bannister and Saunders, 1978). Even if the COO image is not in any way relevant to objectively evaluating the product itself, COO beliefs could generate perceptual, attitudinal and behavioural responses because countries are perceived as having personalities and characters and such images influence customer perceptions, attitudes and behaviours either favourably or unfavourably. This stream of literature contends that customers stereotype the quality, suitability and attractiveness of products coming from certain countries and regions (Agrawal and Kamakura, 1999; Lotz and Hu, 2001), associate product quality with images of the economic and social conditions in the country of origin (Hong and Wyer, 1989; Klein, Ettenson and Morris, 1998) and consequently demonstrate greater purchase intentions for goods and services from countries regarding which they hold favourable images (Wang and Lamb 1983; Piron 2000; Chao 2001). An example of such imagery is provided by Baker and Billington (2002) who suggest that customers perceive Germany as robust and precise, Japan as cutting edge and futuristic, and England as solid and reliable. However, Baker and Billington analyse customers from a mass-market perspective. COO beliefs and images could vary substantially across customer segments and, therefore, it would seem that, images canvassed by Baker and Billington may not be wholly appropriate.

Some studies contend that COO effects operate in a sequential manner with countries tacitly rank-ordered as preferred sources of purchase based on COO beliefs and images. Developed countries are ranked higher than developing countries (Tse and Gorn, 1993; Ettenson, 1993; Lascu and Babb, 1995; Thakor and Kohli, 1996; Manrai, Lascu and Ryans, 1997).

Studies focussing specifically on product-market COO effects canvass that perceptions of a country's marketing strengths and weaknesses, (workmanship, innovativeness, design, economy, safety, service etc), and influence product evaluations and purchase decisions (Davidson, Schroder and Bower, 2003; Peterson and Jolibert, 1995; Verlegh and Steenkamp, 1999). Product specific strengths of countries have been variously described as 'country equity' (Shimp, Samie and Madden, 1993), reputational capital (O'Shaughnessy and O'Shaughnessy, 2000) and 'country-related intangible assets' (Kim and Chung, 1997). The Davidson *et al.* study shows that beef consumers in Scotland regard beef products of Scottish origin and products with the 'Scotch Beef' logo as being safer, higher quality and more expensive than beef marketed with the 'British Meat' label. The Davidson *et al.* study also shows variability in beliefs across market segments. For example, positive beliefs and attitudes to products with the 'Scotch Beef' logo were stronger among rural customers compared to customers in urban areas and among customers who purchased beef from butcher shops as compared to customers who purchased beef from supermarkets.

The predominant conclusion in studies that consider COO effects from a national stereotyping perspective is that often products that are identical in every respect except for their COO are evaluated differently by target customers (Seaton and Vogel, 1982; Wang and Lamb 1983; Nebenzahal and Jaffe, 1993; Elliott and Cameron 1994; Verlegh and Steenkamp, 1999; Ahmed and D'Astous 1999; Orbaiz and Papadopoulos 2003). There are also certain products that are identified exclusively with specific countries, for example French perfumes, English china, German machinery, Italian fashions, Bohemian crystal etc. In the case of products associated exclusively with select countries, customers consciously or unconsciously use COO cues when making judgements about product quality or product image and purchase decisions (Bilkey and Ness, 1982; Cordell, 1992; Tse and Gorn, 1993; Papadopoulos, 1993). Positive COO-product image and association can facilitate higher order product positioning and enable a premium pricing strategy (Phau and Prendergast, 2000; Kapferer, 1994). Thus, COO is a powerful image that can be used as a tool to enhance product standing and develop market positions and profiles (Piron 2000; Chao 2001; Lotz and Hu, 2001).

How relevant are the findings of studies on overall COO beliefs to beliefs and purchase decisions of Australian venison? Would concerns of food safety, hygiene and authenticity regarding red meat and red meat from different countries of origin influence consumer beliefs and behaviour? Does Australia have country equity/country intangible assets in regard to food production and red-meat production? Would country equity/country intangible assets pertaining to food production and/or red-meat production generate "spill-over" benefits to exports of venison? Can the Australian venison industry develop COO labelling and effectively communicate product attributes as was done by the Scottish beef industry with its "Scotch Beef" logo? Would such product identification strategy be effective in only some markets as was the case with Scottish beef? Answers to these questions would depend, among other things, on issues such as the target export country, target export market segment, and COO beliefs pertaining to competing sources of imports in target markets and market segments.

Inter-Country Differences in COO Images and Beliefs

Some studies acknowledge that there are inter-country differences in national stereotyping or halo effects because of product specific COO beliefs. For example, the product-country image of Australia among customers and customer segments in England could be different to the product-country image among customers and customer segments in Japan. Thus, COO based marketing strategies may not always be successful. Barrett (1996), for example, canvasses the use of brand names rather than British COO strategies in some markets because beliefs regarding British origin may not produce favourable outcomes in some markets.

The majority of studies on intra-country differences in COO beliefs analyse the issue rather simplistically. For example, that customers in advanced countries evaluate products made domestically to be superior to products from developing countries (Knight 1999; Chinen *et al.*, 2000; Papadopoulos, Heslop, 2000; Orbaiz and Papadopoulos, 2003) and that customers in less developed countries evaluate imports from developed countries as being superior to products made in the home country (Okechuku and Onyemah, 1999; Kaynak, Kucukemiroglu and Hyder, 2000). Country specific studies in Bangladesh (Kaynak, Kucukemiroglu and Hyder, 2000), Hong Kong (Kaynak and Kucukemiroglu,

2001), Nigeria (Okechuku and Onyemah, 1999) and Kazakhstan (Kaynak and Kara, 1997) show that customers overwhelmingly rate products made in developed countries as being superior to products made in less developed countries. However, a South African study (De Wet, Pothas and De Wet, 2001) immediately following trade liberalization in South Africa finds that South African Blacks prefer to purchase South African made beauty care products as opposed to beauty care products from USA. According to De Wet *et al.* the customers believe that South African products are more adapted to local conditions and that local beauticians have more knowledge about South African products than about products that are imported from the USA. De Wet *et al.* highlight some important issues that need to be considered when analysing COO beliefs and behaviour. It is evident that the type of product, the consequent decision making process involved and the timing of the study influences customer responses regarding beliefs, perceptions and purchase intentions. De Wet *et al.* undertook their study immediately following trade liberalization in South Africa and probably at a time when products of USA origin have not yet gained wide distribution in South Africa. The findings would probably have been different if the study was conducted at a time when the products from the USA had gained wide distribution and there had been advertising and promotional initiatives to inform target customers of product attributes and benefits.

According to Gürhan-Canli and Maheswaran (2000) there could be national culture based differences in COO beliefs. Collectivist cultures (eg Japanese customers) tend to evaluate home country products more favourably regardless of the product attributes whereas individualist culture (eg USA customers) evaluate home country products more favourably only when the product is clearly superior (Gürhan-Canli and Maheswaran, 2000). Gürhan-Canli and Maheswaran's findings contradict the conclusions in a number of studies (Kaynak and Kara, 1997; Kaynak, Kucukemiroglu and Hyder, 2000; Kaynak and Kucukemiroglu, 2001) focusing on Bangladesh, Hong Kong and Kazakhstan (all collectivist societies) where imports from developed countries were perceived to be superior. There are also some examples of studies that demonstrate differences in beliefs across countries that fall within the same national culture context. For example, COO is apparently not considered a significant variable in Belgium whereas it is an important consideration in Canada (Ahmed and d' Astous, 1993), both individualistic societies. Similarly, a number of studies undertaken in Australia indicate a very strong preference for Australian-made products regardless of quality or price considerations (Fischer and Byron, 1995; Sweeney Research, 1999, Baker and Ballington, 2002). Sweeney reports that 88% of consumers in Australia prefer to buy Australian products whenever possible and 77% are happy to pay a premium for Australian goods. According to Fischer and Byron by 1994, as a result of the success of the 'Australia Made' campaign, 79% of Australian consumers surveyed responded that they purchase Australian-made products mostly and whenever possible as compared to only 50% of respondents in 1986. Studies on national culture based COO beliefs also ignore that countries could have substantial cultural heterogeneity (Padmanabhan, 1988; Laroche *et al.*, 2002).

Preferences induced by cultural affinity might encourage consumers to buy products from "ethnically-affiliated countries especially if there are intra-national variations in culture" (Laroche *et al.*, 2002: p. 233). A study on "ethnically-affiliated" buyer behaviour focussing on French Canadians and English Canadians showed that English Canadians tended to demonstrate ethnically affiliated buying behaviour (preference for British goods and goods from countries with which they have strong cultural ties – Australia, USA etc). In contrast, French Canadians demonstrated significantly lower "ethnically-affiliated" buyer behaviour.

It is evident that culture and sub-cultural beliefs regarding food and food preparation, for example the slaughter and handling of meat, would influence customer behaviour. For example, religious groups such as Muslims and Jews require animals to be slaughtered according to Halal or Kosher rituals. In addition, issues such as credence (animal welfare, sustainable production etc) influence the buying decisions of special interest groups such as environmentalist and animal rights activists. However, in reality cultural and sub-cultural groupings are more complex than the basis on which past studies such as Laroche *et al.* (2002) are based upon. Sub-groups would, for example, include nationalities, religious groups, animal rights activists and environmentalists. Concerns regarding credence issues and belief in COO and COO based trademarks may be stronger in some cultures/sub-cultures than in others. A number of studies on COO beliefs in the UK pertaining to red-meat purchases indicate that

there are strong variations in beliefs between English and Scottish customers (Davidson, Schröder and Bower, 2003; McEachern and Schröder, 2004), between customers in the UK and customers in the EU (Glitsch, 2000), between customers in rural and urban areas of Scotland (Schröder and McEachern, 2002) etc. Additionally, research in the UK indicates in the case of red meats a number of other attributes such as colour and leanness (Glitsch, 2000) and place of purchase (Grunert, 1997) are more important purchase considerations than COO. Research in the UK also indicates that, when making purchase decisions regarding meat, British consumers tend not to associate meat with live animals (MAFF, 1999). Customers not associating meat purchases to the animals from which the meat is derived from would appear to be an advantage in marketing venison. If this were not the case, it is probable that some customers would avoid deer meat because of emotive issues such as associating deer to the cartoon character Bambi.

Group beliefs and behaviour are likely to be influenced by beliefs pertaining to the entire supply chain and not to COO beliefs alone. In Malaysia, for example, *Halal* slaughtered products that are transhipped with pig meat would not be acceptable to Muslims. Therefore issues including packaging, presentation, shipping, wholesaling and retailing influence customer beliefs and behaviour. For example, public debate on food safety, quality and supply chain issues arising from consumer concerns regarding bovine spongiform encephalopathy (BSE) and its variant Creutzfeldt-Jakob disease (vCJD) resulted in decreasing the consumption of beef (Baines and Harris, 2000). Davidson *et al.* propose that because of the difficulty of directly linking individual illness with specific meals, consumers are associating meat quality and safety to production and supply-chain processes. Consumer behaviour based on COO beliefs would be particularly strong when there are concerns regarding safety and authenticity of production and supply chain processes. If Davidson *et al.*'s perspective is true, it can be inferred that farmed Australian venison (with strict production and supply chain protocols) would, perhaps, generate more positive COO beliefs to game deer meat from other sources. Davidson *et al.* also suggest that the stronger positive image of 'Scotch Beef' in comparison to 'British Beef' is the outcome of the timing of their study, when British beef exports were banned because of BSE scares. The central thesis espoused here is that customer beliefs are influenced by all elements of the marketing mix and the product itself is only one element of the marketing mix. Even if positive COO beliefs exist in the target market for venison products from Australia, it is important to take cognisance of, research and strategise all elements of the marketing mix.

The findings of Laroche *et al.*, (2002) that Canadians of British descent demonstrate 'ethnically-affiliated' buyer behaviour may be relevant in target market selection for Australian venison products. Would, for example, Australian venison have more positive COO induced buyer behaviour in Great Britain, USA, Ireland and other countries with which Australia has close ethnic/cultural affiliation? Research has to be undertaken to determine the marketing environment (demand, competition, product form etc) for venison products in countries with which Australia has ethnic/cultural affiliation and whether these ethnically/culturally affiliated countries should be the target market or whether it would be more cost effective and profitable to export venison to countries such as South Korea, Japan and Taiwan with which Australia seemingly has less ethnic/cultural affiliation.

Product-Market Specific COO Beliefs and Effects

Departing from the broad and generalized assessment of the studies discussed in the earlier sections, a number of studies have attempted to analyse the importance of product and market context to COO beliefs by differentiating between general COO customer beliefs and behaviour and customer beliefs and behaviour that are specific to product classes and categories (Liefeld, 1993; Zhang 1996; Ahmed and d'Astous 2001; Kaynak, Kucukemiroglu, and Hyder, 2000; Chao, 2001), customer-segments (Ahmad, d'Astous and El Adraoui, 1994; Ahmed and d'Astous, 1995; Brodowsky 1998), geographical markets and national cultures (Gürhan-Canli and Maheswaran, 2000), and ethnocentrism/nationalism (Shim and Sharma, 1987; Acharya and Elliott, 2003; Shoham and Brenčić 2003). Even, if one were to limit the analysis to quality evaluations, COO beliefs in a country can vary substantially for different classes of products and in different segments of the markets in the country (Kaynak, Kucukemiroglu and Hyder, 2000). Not all customers use COO cues and when customers use COO cues they may also not use it to the same extent or may not use it in the same way (Heslop and Papadopoulos, 1993).

COO is highly contextual (contingent upon product category, product history, consumer variables, product variables, relationship-related variables etc) concept and COO beliefs evolve over time (Kleppe, Iversen and Stensaker, 2002; Beverland and Lindgreen, 2002). The study by Beverland and Lindgreen (2002) reviews COO effects for New Zealand produced venison. Beverland and Lindgreen's findings are based on surveys of six key informants associated with the New Zealand Game Industry Board. It is probable that the findings would have been different if the research had focussed on customers or target customers. The Beverland and Lindgreen study would be highly relevant to the Australian venison industry because it is a New Zealand study and focussed on COO beliefs regarding food and agricultural products including venison. However, the study is based on single case study methodology and that too through interviewing a small sample of industry stakeholders. The study has not used many of the tested research techniques (multi-cue, conjoint and environmental analysis) that have been used in other COO studies. In my opinion, the Beverland and Lindgreen study is methodologically flawed and, therefore, the findings of the study may not provide information that could be useful to the strategic marketing needs of the Australian venison industry.

Baker and Ballington (2002) use evidence of the "success" of 'Made in Australia' campaign to canvass that COO beliefs can be used in the United Kingdom to market products such as food, drinks, textiles and other "more traditional" goods that have strong associations with history and culture. Much of Baker and Ballington's contentions are based on studies in Australia (Fischer and Byron, 1995; Sweeney Research, 1999, Baker and Ballington, 2002) that have wholly relied on customer surveys of buying intentions. According to Sweeney 88% of consumers in Australia prefer to buy Australian-made whenever possible and 77% are happy to pay a premium for Australian-made goods. In another study, Fischer and Byron attribute the 'Australia-Made' campaign to be highly successful because the number of respondents that indicated that they purchase Australian-made products "mostly and whenever possible" had increased substantially from 50% in the 1986 survey to 79% in the 1994 survey. The findings of the Australian studies and that of Baker and Ballington (2002) corresponds to the findings in a number of overseas studies (Keown and Casey, 1995; Agrawal and Kamakara, 1999; Kaynak and Kucukemiroglu, 2001) but contradict the findings in other studies conducted in the USA and Europe on COO product specific beliefs. Review and analysis of all these studies suggest that the contradictions in the findings are the outcome of different methodologies and sampling frames that were used by the researchers.

Some studies (Erickson, Johansson and Chao, 1984; Johansson, Douglas and Nonaka, 1985; Lawrence, Marr and Prendergast, 1992) contend that COO has a halo effect in that customers infer product attributes based on COO beliefs. According to Seaton and Vogel (1981) and Nebenzahal and Jaffe (1993), for example, customers expect cheaper prices for products that originate from countries with less favourable country images in comparison to price expectations for similar products from countries with more favourable country images. Chao (1993) extends this thesis by contending that favourable COO product images negate price-quality relationships. Thus if a country enjoys favourable COO product images, customer perceptions of product quality will not alter because of premium or budget pricing strategies. According to Chao, Japan, for example, has high quality image for various products at both premium and more moderate price levels. Several studies (Seaton and Vogel, 1981; Erickson, Johansson and Chao, 1984; Johansson, Douglas and Nonaka, 1985; Lawrence, Marr and Prendergast, 1992; Chao, 1993; Nebenzahal and Jaffe, 1993) indicate that because of product specific COO images, there are benefits in using COO trademarks and logos as a strategy to differentiate products from competing offerings from other sources. Notwithstanding, the potential to use COO as a differentiation strategy, there is little evidence of direct relationships between favourable COO images and price inelasticity of demand.

Past studies on COO and price-quality relationships have primarily focussed on non-food items. In the case of food products, particularly red-meat and even more so a niche product such as venison, issues such as the products position as a low involvement purchase could mean that price of substitute products (for example veal or other exotic meats), product brand profiles, product packaging attributes and packaging aesthetics, type and image of distribution modes etc could all influence customer beliefs and behaviour. COO effects are greater for high involvement products (complex decision

making-more expensive items such as cars) than for low involvement products (Erickson, Johansson and Chao, 1984; Peterson and Jolibert, 1995; Ahmed and d' Astous 1993, 2001; Okechuku and Onyemah 1999; Piron 2000). COO effects are less pronounced where products are homogeneous and standardized and COO effects are more pronounced where the product is highly differentiated (Erickson, Johansson and Chao, 1984; Hong and Wyer, 1989; Manrai, Lascu and Ryans, 1997; Chinen, Jun and Hampton, 2000). According to Keown and Casey (1995) the influence of COO beliefs is very strong in purchase of products such as wine, oriental rugs and caviar. Agrawal and Kamakara (1999) conclude that COO effects are greater for agricultural products than for manufactures. Agrawal and Kamakara's findings demonstrate the complexity of the issue and the importance of evaluating COO effects from a multi-dimensional context. There is ample anecdotal evidence that ethnocentric Japanese consumers prefer domestic rice to rice that is imported from countries such as Australia and the USA, and that Japanese consumers prefer Kobe beef to imported beef. Thus, COO effects can vary across product categories and product-lines in different product markets (different countries and different market segments in these countries).

COO beliefs can also vary for different products from one source country. For example, electronics products from Japan are perceived as being of high quality (Tse and Gorn 1993; Kaynak, Kucukemiroglu and Hyder, 2000), however food products from Japan do not attract highly favourable COO beliefs (Kaynak and Cavusgil 1983). Further, different market segments in a country can demonstrate widely differing COO beliefs and attitudes. For example, Kaynak and Kara (1997) conclude that non-ethnocentric Kyrgyz consumers demonstrate significantly more favourable beliefs, attitudes and buying intentions for imported products in comparison to their ethnocentric counterparts. Notwithstanding the caveat on product specific COO beliefs and behaviour, there is evidence that new brands or products from countries with favourable COO images are more readily accepted by customers (Tse and Gorn 1993; Lampert and Jaffe, 1998; Chen and Pereira, 1999). COO effects could also vary because of the nature of the purchase (Quester, Dzever and Chetty, 2000) – is it a new purchase, a re-buy, a component etc? Past use and good experience with products from a country generates positive affirmation and evaluation of products from that country (Jaffe and Martinez, 1995). Highly involved consumers are more sensitive to COO but this sensitivity diminishes as consumers become more familiar with the product and brand (Lee and Ganesh, 1999; Loussiaef, 2001).

Demographic variables such as gender, age, income, social status and education also influence customer beliefs and behaviour about products from different countries (Bilkey and Nes, 1982; Usunier, 1994; Jaffe and Martinez 1995; Schaefer, 1997; Ahmed and d' Astous, 2001). Jaffe and Martinez (1995), for example, conclude that professionals and more highly educated consumers regard foreign products more favourably than less educated consumers. In contrast, a Canadian study (Ahmed and D' Astous, 2001) concludes that younger consumers and person from lower income classes hold more favourable beliefs regarding products from countries such as South Korea and Taiwan. The contradictions in findings demonstrate that COO beliefs and behaviour arise from the close linkages between specific market needs and product attributes.

Several studies conclude that customers in some countries prefer to purchase products made domestically even if the prices are higher (Hooley and Shipley, 1988; Han, 1988; Hong and Wyer, 1989; Papadopoulos, Heslop, and Beracs, 1990; Han and Terpstra, 1998; Lee, Kim and Miller, 1992). In some cases the preference for domestic products is attributed to national pride or patriotism (Reiersen, 1966; Nagashima, 1970; Baumgartner and Jolibert, 1978; Wall and Heslop, 1991), belief that the domestic economy would be threatened by imports (Heslop and Papadopoulos, 1993), beliefs regarding potential standards of after sales service, for example, quick availability of spare parts (Han and Terpstra, 1998), and unfamiliarity with foreign products and brands (Ettenson, Wagner and Gaeth, 1988; Alder, Hoyer and Crowley, 1993). In the case of a product such as venison, unfamiliarity with foreign products (especially because of religious requirements such as Halal or Kosher killing or food safety issues) could influence beliefs and buying intentions.

Effects of Communication Strategies on COO Beliefs and Attitudes

There is evidence that images about countries can change over time and, therefore, COO beliefs are not permanent (Bilkey and Nes 1982; Hong and Wyer, 1989, 1990; Daring and Wood 1990; Parameswaran and Pisharodi, 1994; Phau and Prendergast, 2000; Verlegh, 2002). Effects of communication on COO beliefs have been explored in some very early studies. Reiersen (1967), for example, demonstrates that foreign product images held by consumers in the USA who are exposed to specific communication media differ greatly from the foreign product images of consumers who are not exposed to these messages. Reiersen also contends that COO images can be made more favourable by associating the products with the names of prestige retailers in the USA. Nagashima (1970, 1977) also demonstrates that negative COO beliefs can be changed through advertising and national export promotion campaigns. Up until about the early 1970's, for example, products from Japan were perceived to be low quality and cheap imitations of major brands in Western Europe and the USA. The negative COO image and belief has changed dramatically. Products from Japan are now recognised as hallmarks of high quality, excellent workmanship and innovativeness. The change to Japan's COO image was the outcome of effective marketing and communication programs and accelerated R&D initiatives by Japanese companies (Relerson 1966; Lampert and Jaffe 1997, 1998; Insch and McBride 1998).

The findings in the studies discussed above provide valuable information for the Australian venison industry. As a relatively new and small exporter of venison, it would seem that the Australia industry would have to communicate to its target market that the country follows stringent hygiene and quality protocols. This message has to be continuously reinforced. Further, it would seem that it would be beneficial for Australian exporters to market their products through established wholesalers and retailers in export markets.

Effects of COO Beliefs on Buyer Decision Making Process

COO beliefs assume importance when customers have difficulty in discriminating between competitive offerings or when customers do not have sufficient knowledge to reduce the risks of their purchase behaviour (Alba and Hutchinson, 1987; Baker and Ballington, 2002; Papadopoulos and Heslop 2002) and therefore are unable to make purchase decision based on attributes such as price, quality and sales services. Knowledge and familiarity with the product tend to reduce the use of COO as an informational cue by customers (Maheswaran, 1994). Motivational intensity (processing motivation, goals and type of information) influence COO based evaluations (Gurhan-Canli and Maheswaran, 2000) and COO based evaluations are part of the mental short cut to decision making which offers a summary of the attributes of the product (Johanson, 1989) and serve as a proxy of quality evaluation (Han, 1989; Johansson, 1989). According to Gurhan-Canli and Maheswaran, in cases where consumers use COO under low motivation situations, there is compelling evidence that images provided by dispersed information would affect COO beliefs. In contrast, in high motivation situations evidence on COO is unlikely to be used in evaluations. According to Gurhan-Canli and Maheswaran when COO beliefs are salient and when consumers find new information that is relevant to their judgement, COO beliefs can change.

Papadopoulos and Heslop (1993) canvass that COO beliefs come into effect cognitively and intuitively in the following sequential steps:(a) overall COO image arising from previous contact and experience (b) overall COO image, cognitive and affective influences arising from experience with other products from the country formulates COO image for the product/brand being considered (c) COO image and functional (core) and aesthetic (augmented) attributes of product/brand create product/brand beliefs and attitudes, and finally (d) comparison with products from other countries generates cognitive and affective behaviours. Thus, the evaluation process moves from an overall image based on COO beliefs to beliefs arising from product specific attributes and comparison with products from other sources.

Interrelationships between Brand Strategies and COO Effects

Brand induced beliefs and behavioural responses, particularly internationally known brand names, and the effects of brand image on customer COO beliefs have been explored in a growing number of studies. Brand name is an image or extrinsic variable that works as summary statistic in formulating purchase intentions (Huber and McCann, 1982; Erickson, Johansson and Chao, 1984; Han, 1989). Brand name is commonly used as a proxy of quality or other product attributes when consumers do not

have sufficient knowledge to assess product quality and other attributes (Jacoby, Olson and Haddock, 1971; Szybillo and Jacoby, 1974).

Brand names foster surrogate COO beliefs because of the identification of brand names with specific countries: IBM with USA, Sony with Japan, Mercedes Benz with Germany, Gucci with Italy, Louis Vuitton with France ... (Ahmed and d'Astous, 2001; Samiee, 1994). The effects of branding on product beliefs and evaluations can be more pronounced than COO effects (Thekor and Pachetu, 1997). Branding and successful marketing mix and communication strategies can generate brand equity and product positioning, for example, BMW signifies sophistication, Nike signifies fitness etc (Phau and Prendergast, 2000). However, there is evidence that COO effects can depreciate positive brand images if the product was designed or assembled in a country with a inferior COO image (Johansson and Nebezahl, 1986). Purchase intentions of high value and luxury products such as a motorcar tend to be influenced both by brand image and COO beliefs (Haubl, 1997). Customers not only choose a reputed brand but also consider the place of manufacture or place of assembly in their buying intentions. However, a strong brand name can reduce the strength of COO effects (Heslop and Papadopoulos, 1993). Most reputed brand names are associated with countries that have high COO images. Overall, international brand name image appears to override COO effects. However, some studies contend that, notwithstanding brand positions and profiles, COO is an important influencer of product choice decisions (Han and Terpstar 1988; Tse and Gorn 1993; Ahmed and d'Astous, 2001).

Increasing numbers and volumes of international brands and private label products are contract manufactured in low cost manufacturing/production bases (Chao 1993; Inch and McBride 1998) while product design and R&D are undertaken elsewhere. Products that are the outcome of collaborative initiatives across several countries are classed as hybrid products. As a result of globalization and liberalization of trade, there has been a proliferation of hybrid products – products that are designed in one country, assembled in another country, products with components and parts from multi sources, brand name registered in one country etc (Han and Terpstra, 1988; Chao, 1993). COO evaluations on hybrid products can arise through (a) product specific beliefs of the country of manufacture/production (b) overall image of the country of manufacture/production, and (c) beliefs regarding the country in which the brand name originated (Lee and Bae, 1999; Lee and Ganesh, 1999).

Notwithstanding hybridization of products based on licensing, franchising, contract manufacturing and other arrangements, COO is an important influencer of product evaluation and purchase decisions (Chao 1993; Inch and McBride 1998; Dzever and Quester 1999; Li, Murray and Scott, 2000). In fact, a number of studies conclude that when a country name in the COO label is associated with a country with negative COO image, customer evaluation of the product becomes unfavourable (Cordell, 1991; Wall, Liefeld and Heslop, 1991).

Some studies (Chao, 1993; Li, Murray and Scott, 2000) conclude that customers do not distinguish between where the product is designed and where it is made. Customers tacitly assume that the country where the product is designed is where quality control is managed and, therefore, the country of design is the surrogate country of manufacture. According to Jaffe and Nebezahl (2001) the importance of the country of assembly and country of design in purchase intentions are different for different products. Inch and McBride (1998) draw similar conclusions in their analysis of the effects of multiple sourcing, designing and assembly on customer beliefs and behaviour. Inch and McBride argue that COO beliefs regarding country of production, country of design, country of assembly etc would vary across products and across markets.

Issues of brand name effects may be relevant to the Australian venison industry if there are competitive threats from international companies that have highly reputed brand positions for food products. For instance, can a large multinational company use brand-leveraging strategies to introduce venison products that are derived from contract farming in Australia or elsewhere in the world? Contract farming, contract manufacturing, contract packing and contract distribution operations in different countries would introduce the issues or opportunities arising from hybrid products. Thus, in regard to venison exports from Australia competitive threats through brand-leveraging by large companies and the issues surrounding hybrid products could impact on COO based marketing strategies.

3. Conclusion

Considerable research has been conducted on COO beliefs and effects on customers. Some studies conclude that COO is a salient variable on consumer product evaluation (Han and Terpstar, 1988; Zhang, 1996; Kaynak, Kucukemiroglu and Hyder, 2000) while other studies (Elliott and Cameron, 1994; Choe and Cho, 2000; Nooh and Powers, 2003) conclude that COO only has a minor effect on quality assessment and purchase decision.

Differences in the conclusions of various studies can be attributed to variables such as the level of product involvement (complexity or sophistication of a product necessitating significant consumer knowledge in making product evaluation or purchase decision) (Ahmed and d'Astous 1993; 2001), methodological differences in the studies (Akaah and Atilla, 1993; Ahmed and D'Astous, 1996), familiarity with countries and products being studied (Johansson, Douglas and Nonaka, 1985; Ahmed and d'Astous 2003) and demographic characteristics of the market (Bilkey and Nes 1982; Choe and Cho 2000). Although COO beliefs and effects may vary because of the variables discussed above, studies that focus on products that involve complex decision making or technically complex products consistently show that COO significantly influences customer beliefs and product evaluation (Ahmed and D'Astous 1993; Piron 2000).

Past studies do not specifically identify the type of information cues that influence COO beliefs (Gurhan-Canli and Maheswaran, 2000a). However, growing customer concerns regarding food safety and quality issues especially in regard to red-meats could mean that COO beliefs would become important in export marketing products such as venison.

COO beliefs and effects are product-market specific (Kleppe, Iversen and Stensaker, 2002). In a general sense, COO is an important cue in purchase decision-making. However, product-country images vary across markets (geographical markets and market segments) because of cultural values and socio-political influences (Kleppe, Iversen and Stensaker, 2002).

The synthesis of extant studies suggest that the use of COO branding and trade-marks together with effective communication and product differentiation strategies could be useful in market development and market penetration initiatives. However, marketers need to clearly identify the information cues that would generate positive product specific COO beliefs in target markets. For example, having determined that there are opportunities to export fish from Norway to countries such as Taiwan, Singapore and Hong Kong, The Norwegian Seafood Export Council (NESC) researched buyer beliefs and behaviour. The NESC identified that image, reference group influence, word-of-mouth and informal channels of communication etc influence customer beliefs and purchase intentions regarding seafood (Kleppe, Iversen and Stensaker, 2002). The NESC developed COO identification trademark and logo to provide a generic image of Norway as being a fresh and clean environment, ensured that its products were aesthetically suitable (firm and fresh in appearance) and communicated this information regarding COO and product attributes to informal reference groups (Kleppe, Iversen and Stensaker, 2002) (Kleppe, Iversen and Stensaker, 2002). In short an effective marketing mix and supply chain strategy should support COO marketing initiatives.

Based on this literature review I would recommend that the Australian venison industry take the following actions:

- Initiate a scoping study to prioritise target markets. For example would the UK (with which Australia has cultural affiliations and, therefore enjoys a positive COO image) be a priority market or would South Korea (where there is a tradition in consuming non-mainstream meat products) be a greater priority?

- Initiate a target product-market focussed study on venison products of Australian origin. The proposed study should research product choice decision process, COO beliefs in regard to Australian venison in comparison to competitive and substitute products in different segments of the target market, brand beliefs, beliefs regarding supply chain issues, hybrid products etc.
- Develop informed market entry, distribution, sales and communication strategies that are based on the findings of target product-market research.

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