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Track 2 - Panel 3

„Conscious Consumption and its Implications at the Interface between Marketing, Consumer Science and Sensory Science“

Title: „Country-Of-Origin Effect and Consumer Brand Loyalty“

Keywords:

COO, Consumer Behavior, Brand Loyalty, Counterfeit, Fashion

Introduction

In 2012, the European fashion industry sales reached approximately €170 billion, with over 181,000 firms, of which 30% are Italian companies (SMI (Sistema Moda Italia), 2013). Fashion is one of the biggest segments of the Italian economy and plays a leading role in the international scene. Both imports and exports play a pivotal role in the fashion industry, accounting for respectively 52.2% and 42.2% of total revenue (SMI (Sistema Moda Italia), 2013), making Italy the second largest exporting nation in the fashion industry worldwide, with sales reaching 51.1 billion in 2012 (Macchion et al., 2014). Italian clothing is at the forefront of global fashion with some of the biggest names featured in worldwide catwalks and in city centers. Prada, Versace, Fendi, Valentino, Giorgio Armani, Dolce & Gabbana, Gucci, and much more are only a few of the globally-recognized brands permeating the fashion industry and setting the standards of modern styles.

Background Situation

This study is centered around the “Made in Italy” label on clothing and its brand promise to consumers. The prestige of the “Made in Italy” brand originates from Italy’s own nation brand’s strength. The country of origin concept and its influence on product branding, perception, and evaluation is essentially embedded in nation branding. A nation is not a “traditional” product, as it does not offer a tangible product or service; instead, it offers a variety of associations and factors such as people, history, tourist attractions, natural resources, culture, image, geo-location, political and economic system, and so on (Fan, 2006). Italy, according to the Nation Brands Index, has the sixth best national image in the world, ranking on the top for tourism and second for its culture (Anholt, 2013). Literature today has focused on COO and its effect on consumer purchasing behavior, but it is still unclear whether it promotes consumer brand loyalty. Studies have suggested the higher impact of brand experience on consumer brand loyalty than brand personality (Brakus, Schmitt, & Zarantonello, 2009), the strong and consistent effect of brand reputation and perceived quality of a product on consumer brand loyalty (Selnes, 1993), and the relationship between the degree of congruity between a brand’s image and identity and the degree of consumer brand loyalty to the said brand (Nandan, 2005). More precisely, there is a lack of research on country-of- origin’s specific impact on consumer brand loyalty, revealing a gap in the literature regarding this topic. Furthermore, existing literature does not cover significantly the impact of country-of-origin on consumer evaluation and purchase behavior of clothing products bearing the “Made in Italy” label. Rather, studies have focused on consumer brand loyalty towards the product’s brand origin, especially in the luxury

sector, in which brands rather than featuring their country-of-origin, the country in which the product is manufactured, opt for promoting their brand origin – the country in which the product is designed and branded, but not in which it is manufactured – to increase their brand equity. So consumers perceive and evaluate the brand by their personality, origin cues, brand name, and consumers own notions such as a status symbol (Aaker, 1997; Phau & Prendergast, 2000; Paciolla & Mai, 2011). This study focuses specifically on COO and its role in impacting consumer brand loyalty.

Research Objectives

The aim of this research paper is to assess the efficacy of the COO effect as a marketing tool for “Made in Italy” labeled clothing but more importantly, to gain crucial information on its level of brand loyalty in consumers to outline its utilization as a marketing tool for creating brand loyalty. While the second objective relates to consumer perception of Italian clothing products’ quality based on their country of origin. Furthermore, the degree of consumer brand loyalty to the “Made in Italy” label is tested under the impact of the counterfeit market of imitation “Made in Italy” and Italian luxury garments. Professionals from the Italian luxury sector, representatives of anti-counterfeit organizations, and marketing researchers will back up the theoretical section of this research paper and give valuable insights into the topics as part of this study. The survey serves as a practical method for extracting relevant insights into consumer perception and evaluation of “Made in Italy” labeled clothing, their reliance on COO as a legitimate product attribute for evaluation and test their brand loyalty to Italian-made clothing when faced with a cheaper, counterfeit product alternative. Combined with a solid theoretical framework and practical expert knowledge, this research process serves as an effective presentation guideline for this paper’s topic.

Research Question

The following research question will be employed as a guiding framework and will be answered in the course of the paper:

RQ: What role does the COO effect play in consumer brand loyalty for clothing “Made in Italy”?

In order to fulfill the objective of the research and further assess consumer perception of clothing “Made in Italy”, two other variables are included in the study, the impact of counterfeiting on the “Made in Italy” brand and the robustness of its consumer brand loyalty. Such variables as integrated into the following

sub-questions:

- How does the counterfeit clothing market impact consumer perception of “Made in Italy” clothing?
- Does the “Made in Italy” brand deliver on its brand promise?

Methodology

As a primary source of data, a literature review was developed as part of the data collection procedure, which laid the foundation for this study. To better understand the research topic, an online questionnaire technique was employed to collect the data. Findings from respondents' answers (n=412) to the conducted survey and the observed relationships between consumer perceptions and loyalty to “Made in Italy” garments were used to demonstrate how this subject is not simply grounded on theory but presents a basis for future research. In other words, the questionnaires' results outlined consumer perception of clothing “Made in Italy”, the impact of counterfeiting on the “Made in Italy” brand, and the robustness of the “Made in Italy” consumer brand loyalty. In addition to the quantitative data collected through the online survey, eight expert interviews were conducted to further enrich the knowledge and to more in-depth and updated information from industry experts to better answer the stated research questions.

Conclusions

As the questionnaire results revealed, COO does indeed influence consumer purchases regarding the “Made in Italy” label, as on average participants of the survey agreed that a garment's country-of-origin does present an added value – but it does not necessarily build brand loyalty in consumers. On average consumers were neutral to COO playing a big role in their purchasing choices, a concept which also emerged from the expert interviews, where respondents confirmed that COO may lose effectiveness as it becomes more difficult to distinguish one brand from another. Most questionnaire respondents agreed with the statement that country of origin says a lot about the product's quality and strongly agreed with the notion that shoppers are influenced by COO biases when purchasing Italian clothing brands.

The “Made in Italy” label is perceived as being of high quality. Questionnaire respondents agreed that Italy has excellent quality workmanship, that Italy has recognized brand names, and that it is a producer of high-quality clothing. These findings are in line with Anholt's (2005) research that the presence of national stereotypes about a country, in this case the Italian lifestyle, makes it easier for consumers to navigate

loads of product information by relying on preconceived notions of Italy's culture of self-care and beauty.

Thus, consumers are aware that "Made in Italy" clothing is of superior quality and attribute a higher value to it, but also agree that it is expensive and are neutral to the statement that it is worth the extra money when compared to similar clothing. This confirms Bilkey and Nes' (1982) findings, in which they pointed out that COO acts as only one of the many attributes that distinguish a product, that a product has other intrinsic and extrinsic traits that may have more influence over consumer buying behavior, and that only in the absence of other cues or characteristics consumers use COO as a means of evaluation.

Recommendations

COO is an integral part of "Made in Italy" producers' marketing mixes. Consumers perceive Italy has a superior producer of fashion, furniture, and food – a notion which benefits small, medium, and large Italian businesses alike – and feel a desire to own something "Made in Italy". Price plays a role in barring consumers from regularly purchasing "Made in Italy" fashion, being one of the main constraints in developing its brand loyalty, but consumers are satisfied with the experience of purchasing and owning something "Made in Italy". This notion feeds the theory that "Made in Italy" does not need to produce brand loyalty, it should rather focus on its characteristic of exclusivity, attracting new consumers and keeping the satisfied ones coming back when presented with the resources and occasion to buy one of its products again.

Businesses working under the "Made in Italy" label cannot compete with counterfeit and mislabeled "Made in Italy" clothing, as lowering the price to match these unfair competitors would decrease its reputation of exclusivity and would risk sacrificing the very element that keeps consumers coming back – quality. There is the need for immediate measures to protect and capitalize on what reflects a pivotal knowledge and cultural resource for Italy by making sure that the craft and skill are passed down.

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