OPTIMIZING FOR COUNTRY OF ORIGIN EFFECTS: A CROSS-REGIONAL STUDY OF FOUR PRODUCT CATEGORIES

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ABSTRACT

A global survey of COO effects for four product categories elicits statistically significant consumer preferences for specific country of origin relative to hybrid product operational dimensions, indicating the need to also identify COO consumer preferences beyond the cost benefits normally associated with global supply chain management practices. Optimum pairings of Regional Trade Areas in terms of COO dimensional preferences are suggested for global consumer market segmentation purposes.

INTRODUCTION

While Country of Origin (COO) effects on consumer product selection have been extensively documented, the proliferation of hybrid products, products with multiple country affiliations (Country of Assembly-COA, Country of Design-COD, Country of Brand-COB, Country of Parts-COP) indicates the need to investigate global consumer COO product dimensional preferences. A Triad/regional trade areas analysis of consumer product valuation in terms of Roth and Romeo operational product dimensions, prestige, design, innovation, and workmanship, would elicit specific product-dimension preference for: 1) optimal hybrid product dimensional mix, and 2) marketing "economies of scope" via either standardization or the necessary customization of the product offering for differentiation objectives.

LITERATURE REVIEW & HYPOTHESES

Beginning with Schooler 1965 seminal study [16], evidence to date generally supports the existence of COO effects. Consumers express preferences for products from some countries over those of other countries [1] [2] [5] [6] [7] [8]. Cordell [5] makes the argument that when deciding on overseas production locations, the manager must take into account not only resources and cost benefits, but also the effect that country of origin may have on consumer evaluations. Examining COO perceptions of fourteen countries and eight products, using perceived quality and choice measures, preferences are found to be more products specific for industrialized countries relative to less developed countries. In addition, hypotheses that performance risk and brand moderate COO effects are upheld under most conditions [5]. Roth and Romeo, evaluating COO effects in terms of the fit between countries and product categories, propose a framework which allows for the matching of the importance of four product dimensions, workmanship, design, innovation and prestige with COO perceived image along the same dimensions. Matches can be either favorable or unfavorable and managers can utilize productcountry match information to assess consumers' purchase intentions and to assist in managing product's COO. Within each product category, there is little variation in the dimension importance evaluations, suggesting a uni-dimensional construct to country image. For all respondents, the correlation between country image and the willingness to buy is positive and highly significant. Country familiarity differences do not appear to affect the consumers' use of image dimension(s) when assessing their willingness to buy [15]. While numerous studies have documented the negative stereotype associated

with products made in developing countries [2] [8] [13] [14], a critical question arises as to how consumers may evaluate products of this nature, and more critically how consumers may evaluate such a product if it is indicated as being designed in a more economically advanced country enjoying a strong reputation worldwide as consumers may rely on this information and impute quality. Chao [3] addressed this hybrid product issue. No significant Country of Design (COD) by Country of Assembly (COA) interaction effect is detected, suggesting that poor perceptions of product quality associated with a particular country of assembly location cannot be compensated by having the product designed in a country with a positive design stereotype. There is no advantage to using a country with superior perceived design capability to boost product quality perception if the product is assembled in an already poorly perceived location [3] [4]. This study demonstrates the value in dimensionalizing COO construct, and the results indicate that a careful choice of design and assembly locations is warranted.

With globalization and the sustained dismantling of national boundaries by telecommunications (the Internet in particular), people may be more sophisticated in their perceptions of consumer products from different countries. Their preferences may vary according to their perceptions of each country in terms of the countries' specialization in specific product dimensions [10] [11] [12], giving rise to the following hypotheses:

H1. The relative importance factor attributed to each of the operationalized COO product dimensions does not vary between nationals from different regional trade areas for H1a. TV products, H1b. Casual Clothes products, H1c. Personal Computer Products, H1d. Medium-Priced Automobile products H2. The relative importance factor attributed to each of the operationalized COO product dimensions, i.e. prestige, design, innovation, workmanship, does not vary across product class, H2a. For all nationals, H2b. Between nationals from different regional trading areas.

METHODOLOGY

Nationals from different parts of the world attending intensive Business Administration and Marketing Certificate Programs at two West Coast universities with a diverse socioeconomic, demographic, occupational background were surveyed. Most attendees were working professionals in their respective countries, thus providing for a globally representative sample of the consumer population. To balance out the international population, U.S. undergraduate and graduate students were also surveyed, providing for an American perspective.

The survey questionnaire collected 1) Cultural, political, and economic affinity for specific country (ies), 2) Unique preferences for a particular country for prestige, design, innovation, and 3) Ratings of the importance of COO product dimensions on a scale of 1 to 7, 1 being least important, and 7, most important for four generic consumer products: TV sets, Casual Clothes, Personal Computers, and Medium-Priced Automobiles. Connotative definitions for the four product dimensions were also provided to minimize potential misunderstanding with prestige as brand name, reputation, design as clever use of color, appearance, style, innovation as applied advanced technology, creativity, ingenuity, and workmanship as assembly, production reliability, quality, durability. The sample population was partitioned into Triad Areas, Regional Trade Areas in terms of European vs. U.S. nationals, Asian vs. U.S. nationals, European vs. Asian nationals, North American vs. South American nationals for comparative studies for valuation convergence/divergence determination, and validation via null hypothesis testing.

Stata [17], a robust statistical package preferred by medical research institutions and federal reserve

banks was used to analyze the data and assess product dimensions relationships and their relative weights/importance factors. Nonparametric test statistics are applied extensively in lieu of the classical analysis of variance tests, given their less restrictive assumptions [9]. Parametric statistics are also provided in this study in addition to the nonparametric statistics to reinforce and establish more confidence in the findings. All null hypothesis testing are conducted first, with nonparametric methods (Pair wise Kruskal-Wallis K-W tests for equality of populations) to emphasize the median as a positional measure, given the cross-nationality comparative nature of the study, and secondly with parametric tests for equality of means and variances (One-way ANOVA with multiple comparisons and Scheffe corrections) for further confirmation.

DATA ANALYSIS & FINDINGS

Two hundred surveys were distributed to students, of which 170 were collected (85%) for a usable total of 167 (83.5%). Of the 167 responses, gender partition consists of 58% male and 42% female respondents; 30 different nationalities are represented, with 34% from the U.S., 7% from Japan, 6% from Spain, 6% from Germany, 4.8% from Switzerland, and 4.8% from Brazil, and the rest from various countries. The sample population is quite mature (lending some stability and reliability to the findings), ranging from 18 to 59 in age, with 26.35% in the 18-24, 28.74% in the 25-29, 25.75% in the 30-34 and respectively 8.38% in the 35-39 and 40-44 age bracket for a total cumulative percentage of 97.60%. 82% of the respondents are university graduates, with 47.1% at the post-graduate level.

TV Sets

In terms of product prestige, design and innovation for TV sets, Japan is the undisputed global benchmark with 67% of respondent nominations for prestige, 74% for innovation and 65% for design. The U.S. ranks second for design and innovation, conceding second place to Germany for prestige. These three countries account for 95% of all responses for prestige and innovation and 84.45% for design, with France and Italy tied at 3.70 % each for third and fourth place. The best-ranked six countries for TV workmanship are Japan, Germany, Korea, the U.S.A., Taiwan and Canada in descending order. Graphical data analysis of the four product dimensions reveals varying levels of assigned importance, but the rank order of the four dimensions in terms of their relative importance vis a vis each other is maintained throughout the four regional areas and does not deviate from the total sample ranking of mean ratings. Workmanship is rated highest, followed by innovation, design and prestige.

Median ratings for prestige are identical for South-America and Asia at 5, North America rating it a 4 and E.U. a 3.5: South American and Asian nationals (($chi^2(1)=0.929$, p=0.3352; 0.947) concur on the relative importance of prestige in their evaluation of TV sets while European and North American nationals are close to concurrence (($chi^2(1)=0.469$, p=0.4934; 0.926): South American and Asian nationals concur on the relative importance of prestige for TV sets.

Median ratings for the design dimension are 5 for North America, Asia and Europe; congruence is confirmed for Europe and North America (chi²(1)=0.155, p=0.6937; 0.975), for Europe and Asia (chi²(1)=3.241, p=0.0718; 0.262), for Asia and North America (chi²(1)=2.448, p=0.1177; 0.423): *European, North American and to a lesser degree Asian nationals all agree on the relative importance of design for TVs.*

With respect to innovation, congruence is indicated for South America, E.U. and Asia with a median rating of 6 for all three regions by medians plot analysis, confirmed for Europe and South America ($chi^2(1)=2.320$, p=0.1277; 0.541), for Europe and Asia ($chi^2(1)=1.923$, p=0.1655; 0.330), and for Asia and South America ($chi^2(1)=0.066$, p=0.7972; 1.000): South American, Asian and to a lesser degree European nationals all agree on the relative importance of innovation for TVs.

Complete agreement for workmanship is expected and evidenced by the median ratings plots (all four ratings at 7, the highest rating), and confirmed for Asia and North America ($chi^2(1)=0.044$, p=0.8345; 0.995), Asia and South America ($chi^2(1)=0.243$, p=0.6223; 0.965), and North America and South America ($chi^2(1)=0.492$, p=0.4829; 0.897): *Nationals from all four regional trading areas concur on the relative importance of workmanship for TVs, with more Asian, North American and South American nationals in agreement with each other as compared to any other regional pairings.*

Casual Clothes

France leads in prestige, followed by Italy and the U.S., while Italy leads in design, followed by France and the U.S. Interestingly enough, the U.S. leads in the innovation category, followed by France, Italy and Japan. The best six countries for casual clothes workmanship ranked in descending order are: France, the U.S.A., Canada, U.K., Germany and Korea. In terms of product dimensions importance (mean ratings), Europe and North America both rank workmanship first, followed by design, innovation and prestige; Asia ranks design first, followed by workmanship, prestige and then innovation while South America ranks workmanship first, followed by design, prestige and then innovation.

Median ratings plots indicate complete agreement among all four regional areas nationals with respect to prestige, corroborated for Europe and North America ($chi^2(1)=0.064$, p=0.8010; 0.995), Europe and Asia ($chi^2(1)=0.423$, p=0.5154; 0.954), Asia and North America ($chi^2(1)=0.753$, p=0.3855; 0.862): Nationals from all four regional trading areas concur on the relative importance of prestige for casual clothes, with more European and North American, European and Asian, Asian and North American nationals in agreement with each other as compared to any other regional pairings.

South America and Asia nationals both rate design as the most important dimension with a median rating of 7 while North America and E.U. nationals both gave it a lower 6 on a scale of 1 to 7. The distribution of the ratings is also similar, confirmed for Europe and North America ($chi^2(1)=0.087$, p=0.7679; 0.900), and Asia and South America ($chi^2(1)=0.001$, p=0.9722; 0.994): Asian and South American nationals agree that design is more important for casual clothes than European and North American nationals.

Innovation as a product dimension achieves consensus of opinions as all 4 regional areas rate it a 4. The histograms of the distribution of the ratings do not exhibit the same degree of cohesion, but congruence is confirmed for Europe and North America ($chi^2(1)=0.017$, p=0.8971; 0.999), Europe and South America ($chi^2(1)=0.127$, p=0.7215; 0.980), and North America and South America ($chi^2(1)=0.224$, p=0.6362; 0.955). Nationals from all four regional areas concur on the relative importance of innovation for casual clothes, with more European and North American, North American and South American nationals in agreement with each other as compared to any other regional pairings.

Consensus is not reached for workmanship as Asia, Europe and South America rate it a 6, and North America a 7. Congruence is validated for Europe and Asia ($chi^2(1)=0.184$, p=0.6676; 0.980), Europe and South America ($chi^2(1)=0.350$, p=0.5539; 0.946): *European, Asian, and to a lesser degree South American nationals all agree on the relative importance of workmanship for casual clothes*.

Personal Computers

The U.S. dominates this product category in prestige, design and innovation, setting itself as the global benchmark with 85% of respondent nominations for prestige, 64% for innovation and 72% for design. Japan is the distant second in prestige with 12.7%, 35.6% of the nominations for innovation and 25.4% for design. These two countries account for 97% of all nominations. The best-rated six countries for workmanship are in descending order: Japan, the U.S., Korea, Taiwan, Germany, and Canada. The importance ranking of the four product dimensions, workmanship (1), innovation (2), design (3), and prestige (4) is not maintained throughout the regions, indicating divergence of opinions. Innovation and workmanship (31%) are more important for Europeans, followed by prestige (19%) and then design (18%). Innovation (29%) is more important for Japan, followed by workmanship (28%), prestige (22%) and design (21%). North American respondents rank workmanship (31%) foremost in importance, followed by innovation (29%), design (22%) and prestige (19%). South America emulates Europe in terms of rank order but with different weights, workmanship and innovation tie at 27%, prestige at 24% and design trailing at 21%.

South America rates prestige a 6 for personal computers, Asia a 5, and Europe and North America in agreement with each other, a 4. The congruence in opinions is confirmed with K-W equality tests with $chi^2(1)=0.013$, p=0.9100 and one-way ANOVA with Scheffe corrections at 1.000: *European and North American nationals concur on the relative importance of prestige for PCs*.

The design dimension does not suffer from as much divergence as Europe is the only outlier with a median rating of 4 and North America, South America and Asia are in agreement with a 5 rating. Convergence of valuations for these three regions is corroborated for Asia & North America $(chi^2(1)=0.000, p=0.9939; 0.991)$, Asia and South America $(chi^2(1)=1.304, p=0.2534; 0.649)$, North America and South America $(chi^2(1)=1.654, p=0.1983; 0.759)$: Asian, North American and to a lesser degree South American nationals all agree on the relative importance of design for PCs.

Nationals from the four regional areas are unanimous about innovation, with all median ratings at 7, the highest importance rating, validated for Europe and North America ($chi^2(1)=0.428$, p=0.5131; 0.665), Europe and Asia ($chi^2(1)=1.294$, p=0.2554; 0.977), Europe and South America ($chi^2(1)=0.214$, p=0.6440; 0.966), Asia and North America ($chi^2(1)=3.237$, p=0.0720; 0.411), Asia and South America ($chi^2(1)=0.343$, p=0.999; 0.977): *Nationals of all four regional areas concur on the relative importance of innovation for PCs, with Asian, South America and European nationals to a greater degree*.

Opinions regarding workmanship for PCs reaffirm the importance of this dimension, with all median ratings at 7, confirmed for Europeans and North Americans ($chi^2(1)=0.488$, p=0.4848; 0.985), Europeans and Asians ($chi^2(1)=0.005$ p=0.9430; 0.900), Europeans and South Americans ($chi^2(1)=0.338$, p=0.5612; 1.000), Asians and North Americans ($chi^2(1)=0.521$ p=0.4704; 0.702),

Asians and South Americans ($chi^2(1)=0.351$, p=0.5535; 0.913), and North Americans and South Americans ($chi^2(1)=0.000$, p=0.9828; 0.997): Nationals of all four regional areas concur on the relative importance of workmanship for PCs, and to greater degree, European with South American nationals, and North American with South American nationals.

Automobile Products

Germany, Japan and the U.S. dominate this product category, with Germany leading in prestige with 63.85%, followed by Japan (23.85%) and the U.S. (7.69%). Japan leads in automobile product innovation with 70.54%, followed by the U.S. (13.95%) and Germany (11.63%). Japan also leads in product design with 43.85%, followed by Germany (26.92%), the U.S. (14.62%) and Italy (13.08%) for a cumulative 98.47%. Germany ranks first in workmanship, followed by Japan, U.S.A., U.K., Korea and Canada. Asia and South America are identical in importance ranking for the four dimensions, with workmanship at 27%, design 26%, innovation 24%, and prestige at 23%. European and North American respondents concur with workmanship being more important but differ on the remaining other three dimensions. Europe rates the importance of innovation at 26%, design 25%, and 21% for prestige. North American respondents rate design at 25%, innovation at 24% and prestige at 22%.

Median ratings plots denote common valuation for South America and Asia for prestige with a rating of 6 and for Europe and North America with a rating of 5, confirmed with box plots of ratings for distribution comparison and validated for Europe and North America ($chi^2(1)=1.503$, p=0.2202; 0.767), and for Asia and South America ($chi^2(1)=0.002$, p=0.9644; 0.997): *Asian and South American nationals agree that prestige is more important for automobiles*.

European, Asian and North American nationals are in agreement with a median rating of 6 for design while South America is the sole statistical outlier with a median rating of 7, confirmed for Europe and North America ($chi^2(1)=0.552$ p=0.4574; 0.993), and Asia and South America ($chi^2(1)=0.227$ p=0.6341; 0.962) pairings: *European and North American nationals are more in agreement on the relative importance of design for automobiles than Asian and South American nationals*.

All regional area nationals converge with a median rating of 6 for innovation, validated for Europe and North America ($chi^2(1)=0.824$, p=0.3642; 0.855), Europe and Asia ($chi^2(1)=0.483$ p=0.4872), Europe and South America ($chi^2(1)=0.006$, p=0.9385; 0.989), Asia and North America ($chi^2(1)=2.696$ p=0.1006; 0.355), Asia and South America ($chi^2(1)=0.478$, p=0.4892; 0.986), and North America and South America ($chi^2(1)=0.512$, p=0.4744; 0.775): Nationals of all four regional areas concur on the relative importance of innovation for automobiles, with more European and South American nationals, Asian and South American nationals in agreement with each other as compared to any other regional pairings

Prior unanimity regarding workmanship carries over to automobiles with regional congruence with a median rating of 7. K-W equality of population tests and Scheffe corrected one-way ANOVA corroborate this phenomenon for Europe and North America $(chi^2(1)=1.142 \text{ p}=0.2853; 0.368)$, Europe and Asia $(chi^2(1)=0.007 \text{ p}=0.9334; 0.926)$, Europe and South America $(chi^2(1)=2.047, \text{ p}=0.1525; 0.378)$, Asia and North America $(chi^2(1)=1.121 \text{ p}=0.2897; 0.702)$, Asia and South America $(chi^2(1)=2.279, \text{ p}=0.1311; 0.702)$, and North America and South America $(chi^2(1)=0.578, \text{ p}=0.4470; 0.980)$: Nationals of all four regional areas concur on the relative importance of workmanship for

automobiles, with more North American and South American nationals, European and Asian nationals in agreement with each other as compared to any other regional pairings.

The importance ratings by region for each of the product categories and the regional best countrypairings are summarized in Table I.

Table I

Product Dimensions Valuation Concurrence/Divergence Summary						
Product Dimensions:	All	Importance Ranking:				Regional
		E.U.	Asia	N.A.	S.A.	Best Pairing:
TV Sets						
Prestige	4	4	4	4	4	South America & Asia
Design	3	3	3	3	3	E.U. & North America
Innovation	2	2	2	2	2	Asia & South America
Workmanship	1	1	1	1	1	Asia & North America
Casual Clothes						
Prestige	3	4	3	4	3	E.U. & North America
Design	1	2	1	2	2	Asia & South America
Innovation	3	3	4	3	4	E.U. & North America
Workmanship	1	1	2	1	1	E.U. & Asia
PC Products						
Prestige	4	3	3	4	3	E.U. & North America
Design	3	4	4	3	4	Asia & North America
Innovation	2	1	1	2	1	Asia & South America
Workmanship	1	2	1	1	1	E.U. & South America
Automobile Products						
Prestige	4	4	4	4	4	Asia & South America
Design	2	3	2	2	2	E.U. & North America
Innovation	3	2	3	3	3	E.U. & South America
Workmanship	1	1	1	1	1	North & South America

Legend: *italicized* product dimensions denote divergence; ranking: 1 most important, 4 least All: Total sample; N.A.: North America; S.A.: South America.

MANAGERIAL IMPLICATIONS

The globalization of business spurred onward by the pursuit of higher profits with lower manufacturing, sourcing costs and the search for new markets have exacerbated the complexity of COO effects beyond the supply-sided rational argument [18]. Globalization has also brought on intense debate about the merits of and continuing relevance, or lack of, national origin identifiers. Some observers, and prominent author (Ohmae), argue that origins are no longer relevant in global markets where "hybrid" products, those with components from several countries, are the norm. Others maintain that the reverse is true, since globalization will bring about specialization, and therefore highlight the strengths (real and perceived) of origin countries, with origin now loosely defined, i.e. the country of manufacture, design. These arguments may be purely rhetorical to consumers as their valuations of product dimensions **do differ** across product class, and **do differ** also across national boundaries (in this study across regional trade areas). Generalization of consumer product dimensional preferences for international marketing

purposes could prove hazardous. Design, which is as critical as workmanship for clothes does not have the same allure when applied to personal computers; innovation, which is perceived to be as important as workmanship for personal computers is secondary to design for casual clothes. Chao's conclusion regarding the careful selection of a country for manufacture to avoid COO derogation [3] [4] is corroborated by this study, as workmanship is the most critical product dimension as perceived by consumers for all four classes of products. The findings suggest that when considering foreign sourcing, the seller must consider not only labor costs in the foreign country but also the sourcing country's image for specific product dimensions, and either emphasize or downplay the sourcing country. When sourcing from a country with a favorable image, the seller may choose to highlight the country of assembly (COA) for promotional purposes. Beyond the workmanship dimension, strategic combinations of countries in terms of their perceived competencies for design, innovation, and prestige for promotional and product labeling purposes should enhance a product competitive position: Japanese, U.S., German brands with Japanese, or German, or Korean, or U.S. assembly For TV sets, French, Italian, U.S. brands with French, or U.S., or Canadian manufacture for casual clothes, U.S. brand with U.S., or Japanese, or Korean, or Taiwanese manufacture for PCs, German, Japanese, U.S. brands with German, or Japanese, or U.S. manufacture for mid-priced cars. Within each product class, the lack of consistency in regional pairings for the four product dimensions is indicative of the rather critical need to manage COO effects according to regional preferences. TV sets may appear to be global products based on the importance ranking of the four product dimensions but regional perception differences persist.

The current global proliferation of consumer products "Assembled in China" warrants further investigation into China and its attendant country of assembly (COA) effects in conjunction with product positioning and pricing schema: China was not nominated once for workmanship in this study. The recent sourcing decision of a reputable U.K. company for its home entertainment line of products, with high end and correspondingly higher priced products to be assembled in the U.K. with the remainder to be assembled in China would seem to validate this future research endeavor.

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