

Market Competitiveness among Major Industrialized Countries in Saudi Arabia: The Country-of-Origin Effect on Foreign Product Evaluation

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Abstract. The author explores consumers' attitudes towards products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France in Saudi Arabia. The study uses 18 general product attributes marketing practices indicators to explain the general attitudes of Saudi consumers towards products and marketing practices of the six major industrialized countries. An examination of 381 Saudi consumers reveal that they have the most positive attitudes towards products and marketing practices of Japan and the U.S.A. Among the four Western European competitors, German products and marketing practices have received the most favourable ratings. Finally, Saudi consumers have made no substantial distinctions among the products and marketing practices of Italy, U.K. and France.

Introduction

Achieving, enhancing and sustaining competitiveness in international markets is critical for the survival and growth of international business enterprises [1]. Most of the international markets are proving to be aggressively dynamic arenas for competitive interaction. To compete successfully in these arenas, it is of paramount importance that marketing managers have profound understanding of the varying needs and demands of consumers in various international markets within which these firms interact [2]. Consumers' attitudes toward foreign products have been shown to be very important influences on the purchase behavior in international markets [3]. The country-of-origin literature has contributed substantial knowledge of consumers' attitudes toward foreign products in various countries and has provided insight into the significance of such knowledge for the determination of successful international marketing strategies [4]. Although several developing country markets have emerged as focal points of

international business activities, research on the attitudes of consumers toward foreign products in developing countries is scanty [5].

Based on the above considerations, this study was undertaken to empirically examine consumers' attitudes towards products and associated marketing practices of major industrialized countries in Saudi Arabia, a highly competitive developing country market.

The paper is organized as follows. Section two describes the background of the study, including a brief review of the country-of-origin literature and a discussion on the study context, Saudi Arabia. Section three provides the research issues. The methodology of the study is discussed in section four, followed by the discussion of results in section five. The study ends with the discussion and conclusion.

Background

Country-of-origin literature: A brief review

Numerous aspects of the influences of country-of-origin on consumers' attitudes toward foreign products have been examined in the literature. Some have found that consumers' preference for products made in different countries differs [6]. Some have examined and revealed that there is a relationship between consumers' preference for products made in different countries and the level of economic development of those countries [7]. Others have found various other sources of biases that can influence consumers' preference for products made in different countries, including ethnocentric bias [8], patriotic sentiments [9], different demographic characteristics of consumers [10], product type [11], and product familiarity [2, p. 1]. Few others have surveyed consumers of different countries and reported that they differ with respect to country-of-origin influence [12]. Extant literature of country-of-origin influence has contributed significant knowledge of consumers' attitudes in various countries towards foreign products and associated marketing practices. A number of studies related to country-of-origin effect have also been carried out in Saudi Arabia. For example, a study reported that Saudi importers evaluated Japanese suppliers most favorably, followed consecutively by the U.S., England, and Taiwanese suppliers [13]. Another study concluded that oil producing countries and non oil producing countries differed with respect to their attitudes towards the main factors affecting the choice among various brand of imports [14]. Yet another study found that Saudis favored domestic products in some respects but also expressed concerns in others [15]. These studies have advanced our knowledge about the country-of-origin effect in Saudi Arabia.

However, few observations can readily be made about such studies. First, most of the studies have been conducted in the U.S. utilizing foreign students with the assumption that foreign students in the U.S. behave similar to the broader populations of their respective countries [16]. Second, a few studies that have been undertaken outside the U.S., mostly included other industrialized countries and Eastern European countries.

Third, most studies have asked consumers to evaluate their own country's products and marketing practices relative to foreign products and marketing efforts without considering the bias due to patriotism or ethnocentrism. Finally, no study has investigated the competitive foreign rivalries among products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France in an important and highly competitive developing country market, Saudi Arabia.

Saudi Arabia: A highly competitive developing country market

The focus of this study, Saudi Arabia, is well suited to an examination of consumers' attitudes toward imports in a highly competitive developing country market. Saudi Arabia represents \$25 to \$30 billion worth of annual export potential to international marketers [17]. It is one of the biggest consumers of foreign goods with a per capita gross national product surpassed every African and Latin American country and was exceeded in Asia only by that of Japan, Singapore and Hong Kong. Consequently, there has been a proliferation of foreign brands that have been marketed in Saudi Arabia by multinational firms from major industrialized countries. The top six exporters of consumer products to Saudi Arabia are the U.S.A., Japan, Germany, Italy, U.K. and France. Consequently, these countries were included in this study.

Also, a high level of cultural, social, and economic homogeneity prevails in Saudi Arabia. Almost hundred percent of the Saudi population, 12 million, speaks Arabic. Almost all of the inhabitants profess Islam. Further, the phenomenal economic growth, through oil revenues, has brought prosperity in all regions of the country. The combination of common language, common religion, and equitable economic prosperity has led to a common sense of heritage and cultural, social, and economic unity among the Saudis. The characteristic of cultural, social and economic homogeneity is important for this study because similar behavior patterns tend to permeate societies with similar characteristic [18].

Finally, there has been a call for examining the market competitiveness among major industrialized countries in third countries, particularly developing countries, containing knowledgeable consumers. Since Saudi Arabia relies on foreign products to accommodate almost 80% of its domestic needs and the six countries under study here are the top six exporters to Saudi Arabia, it can be expected that consumers in Saudi Arabia are very knowledgeable about products and marketing practices of these six countries.

Research Issues

Based on the preceding discussion, this study sets out to learn the nature of consumers' attitudes toward products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K., and France in Saudi Arabia. For the purpose of this study, the concept of attitude refers to ideas, feelings, emotions, and connotations associated

with a product(s) from an identifiable country [4, p. 1]. Here, attitudes toward product refer to eight core product attributes, i.e., workmanship, quality, suitability, reliability, competitive position, technological advancement, clever use of color and design, and wide choice of sizes and models. Likewise, marketing practices include 10 elements, i.e., package, retail availability, repair and maintenance services, display and merchandising in retail stores, reputation of retail stores, brand names, package labels, advertisement, reasonable price, and inexpensive compared to competition. This classification of products attributes and marketing practices has been advanced in the literature [e.g., 1, 4, and 12]. It has been argued that the eight product attributes are at the core of the product and the ten marketing practices are used as marketing satisfiers in association with the core product [4]. Empirically, these 18 elements have been found to form two factors, one with the 8 elements of product attributes and the other with the 10 elements of marketing practices. Because of the lack of studies on consumers' attitudes toward foreign products in developing countries, this study necessarily had to adopt an explorative approach. The objective was to initially explore consumers' attitudes toward foreign products within the given research context, and to use this study as a basis for developing testable hypotheses for future studies. consequently, the present study sought to examine two broad research issues. These are:

1. What are the attitudes of Saudi consumers toward product attributes-workmanship, quality, suitability, reliability, competitive position, technological advancement, clever use of color and design, and wide choice of sizes and models-associated with the products of the U.S.A., Japan, Germany, Italy, U.K. and France?
2. What are the attitudes of Saudi consumers toward marketing practices-package, retail availability, repair and maintenance services, display and merchandising in retail stores, reputation of retail stores, brand names, package labels, advertisement, reasonable price, and inexpensive compared to competition-associated with the products of the U.S.A., Japan, Germany, Italy, U.K., and France?

Methodology

Measure

The Saudi consumers' attitudes toward foreign products and associated marketing practices were measured on multiple-item scales drawn from previous research. The questionnaire was adopted from [4, p. 1], [19], and [1, p. 1] and included 18 "Likert-type" statements focusing on products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France. For each of the statements, respondents were asked to respond along a five-point scale ranging from 1, 'strongly agree,' to 5, 'strongly disagree.' Within the 18 statements, 8 dealt with various product attributes and 10 were related to marketing practices associated with such products. The reliability coefficients (Cronbach's Alphas) of product attributes and marketing practices were .85 and .80 respectively. The exact wording of all the statements are given in Tables 1 and 2.

Table 1. Saudi consumers' attitudes toward products of major industrialized countries

Research statement	F-Ratio	Mean level of response by country						
		U.S.	Japan	Germany	Italy	U.K.	France	Total
Summary of eight product attributes	245.27 (p=0001)	1.77 2*	1.59 1	1.89 3	2.59 4	2.64 5	2.7 7.5	2.19
Individual items								
1. Products made in _____ are carefully produced and have a fine workmanship	109.01 (p=0001)	1.77 2	1.56 1	1.70 2	2.60 3	2.57 3	2.69 3	2.15
2. Over the past several years, the quality of most products made in _____ seems to have improved	100.01 (p=0001)	1.98 2	1.55 1	1.99 2	2.65 3	2.73 3	2.79 3	2.28
3. The suitability of products made in _____ to the Saudi consumers seem to have improved over the last several years.	85.01 (p=0001)	1.94 2	1.68 1	2.12 3	2.65 4	2.76 4	2.92 5	2.34
4. Products made in _____ are usually quite reliable and seem to last the desired length of time.	108.07 (p=0001)	1.73 2	1.85 2	1.57 1	2.63 3	2.55 3	2.81 4	2.19
5. Products made in _____ occupy a very strong competitive position in comparison to the products of other countries.	130.35 (p=0001)	1.70 2	1.45 1	1.80 2	2.63 3	2.71 3	2.75 3	2.17
6. Products made in _____ show a very high degree of technological advancement.	169.29 (p=0001)	1.59 2	1.35 1	1.74 3	2.77 4	2.62 4	2.69 4	2.12
7. Products made in _____ usually show a clever use of color and design.	35.129 (p=0001)	1.83 1	1.75 1	2.10 2	2.35 3	2.56 3	2.30 3	2.15
8. Products made in _____ are generally available in a wide choice of sizes and models.	89.46 (p=0001)	1.70 2	1.57 1	2.16 3	2.60 4	2.66 4	2.67 4	2.22

*Ranking based on Wilcoxon-Duncan grouping

Table 2. Saudi consumers' attitudes toward products of major industrialized countries

Research statement	F-Ratio (p=0001)	Mean level of response by country						Total
		U.S.	Japan	Germany	Italy	U.K.	France	
Summary of Marketing Practices	179.98 (p=0001)	1.83 1	1.78 1	2.32 2	2.63 3	2.69 3	2.75 3	2.33
Individual items								
1. The packages of products made in _____ are well-designed and are available in an adequate number of sizes. (p=0001)	44.64	1.87 1	1.72 1	2.15 2	2.47 3	2.58 3	2.51 3	2.21
2. Products made in _____ are usually available in the retail stores in which one expects to find them (p=0001)	74.01	1.86 2	1.66 1	2.38 3	2.55 4	2.79 5	2.77 5	2.33
3. In general, repair and maintenance services provided for products made in _____ are adequate. (p=0001)	110.13	1.84 1	1.71 1	2.39 2	2.97 3	2.96 3	3.09 3	2.49
4. Products made in _____ are usually well displayed and merchandised in retail stores. (p=0001)	73.51	1.80 1	1.71 1	2.28 2	2.59 3	2.81 3	2.72 3	2.32
5. The retail stores that carry products made in _____ usually have a good reputation. (p=0001)	49.41	1.72 1	1.86 1	2.03 2	2.50 3	2.56 3	2.58 3	2.21
6. The brand names of products made in _____ are easily recognizable and generally quite well-known. (p=0001)	89.40	1.53 1	1.54 1	1.99 2	2.52 3	2.57 3	2.56 3	2.12
7. The package labels and directions for use of products made in _____ are usually understandable and informative. (p=0001)	71.16	1.62 1	1.75 1	2.33 2	2.62 3	2.42 2	2.71 3	2.24
8. The advertisement of products made in _____ are usually believable and provide a reliable source of product information. (p=0001)	58.87	1.83 1	1.83 1	2.22 2	2.76 3	2.60 3	2.75 3	2.33
9. Products made in _____ are usually reasonably priced in comparison to similar products from other countries. (p=0001)	29.60	2.44 1	2.29 1	3.07 3	2.77 2	3.02 3	3.05 3	2.77
10. Products made in _____ are usually quite inexpensive in comparison to similar products from other countries. (p=0001)	11.19	2 2	1 1	3 3	2 2	3 3	3 3	3

Data collection

The data for the present study was collected from consumers living in the Saudi Arabian major metropolitan areas of Riyadh, Jeddah, and tri-cities of Dammam/Dhahran/Al-Khobar in 1994. Initially, 440 questionnaires were distributed to a judgemental sample consisting of managers, employers, faculty, staff and students from selected business firms and universities. After three call-backs, 381 of these were collected representing a response rate of 87 percent which compares favorably with other studies undertaken in Saudi Arabia [20]. Sixty-three percent of the respondents was from business firms and 37 percent was from universities.

The characteristics of the respondents indicate that a vast majority (67 percent) were between 18 and 34 years old, 85 percent had some college or a university degree, 55 percent had a family of four or more people, and 60 percent made Saudi Riyal (SR) 5,000 to 25,000 per month. In general, the profile of respondents tended to be younger, to have more education, to have large family, and to have higher income. Consequently, this sample closely represented the "middle class" of Saudi Arabia who have strong interest in consumer products from around the world. In order to test for the possible effect for the variations in demographics of the respondents on the study issues, ANOVA tests have been conducted with product attributes and marketing practices. Test results indicate that there is minimum noise from the variations in the demographics in the study. Therefore, the sample of this study can be considered to be very suitable for examining the research issues of this study.

Analysis

In examining the research issues, the analyses of variance were utilized. The analyses of variance were performed for each of the 18 statements and for the two summats, one with 8 product attributes related statements and the other with 10 marketing practices concerning statements, in order to statistically determine the similarities or differences among the responses of Saudi consumers related to six countries. Further, Waller-Duncan k-ratio t tests were undertaken for individual items and for the summats to determine the groupings within which the mean responses associated with different countries are not significantly different.

Results

Table 1 shows the results of ANOVA and Waller-Duncan k-ratio t tests related to product attributes. It can be noted from the Table that the results of the analyses of variance tests indicate significant differences at the 0.0001 levels in responses for all 8 statements both for the summat and individual statements. In general, Japanese products received a relatively positive rating from Saudi consumers, followed by the products of the U.S.A. The products of Germany ranked third, while products of Italy, U.K. and France appeared to be at the same level to Saudis. The positions of Japan and the U.S.

are consistent with the findings of a previous study [13]. However, the lack of any previous study in Saudi Arabia that included the four European countries of this study hampered our ability to compare the entire results.

Japanese products were rated above all countries on seven product attributes out of a total of eight. For only one attribute, i.e., reliability, German products occupied the top position. Products of the U.S.A. ranked second on all eight attributes. For four attributes, i.e., workmanship, quality, competitive position, and clever use of color and design, German products shared second positions with U.S. products, while for the rest three attributes, i.e., suitability, technological advancement, and wide choice of sizes and models, German products ranked third. Products of Italy shared third positions on five attributes and fourth on three attributes. Products of the U.K. shared third positions with Italian products on four attributes and ranked fourth on four other attributes. Finally, French products shared third positions with products of Italy and U.K. on three attributes, shared the third position with Italy on one attribute, shared fourth positions with Italy and U.K. on two attributes, occupied the fourth position on one attribute, reliability, and ranked fifth on one attribute, suitability.

Table 2 displays the results of ANOVA Waller-Duncan k-ratio t tests pertaining to marketing practices. The results of the analyses show significant differences at the 0.0001 levels in responses for all 10 statements, combined and individually. In general, Japanese and U.S. marketing practices received most favorable ratings. German firms' marketing practices ranked second, while marketing practices associated with products of Italy, U.K. and France were perceived to be at the same level by Saudi consumers. Again, the ranks of Japan and the U.S.A. are consistent with the results of a past study [13]. The findings related to the four European countries could not be compared because of the unavailability of any past research.

Regarding individual statements, Japanese firms' marketing practices ranked first on all the ten practices. Marketing practices of U.S. firms shared first positions with Japanese firms on eight practices. Only on two practices, i.e., retail availability and inexpensive compared to competition, U.S. firms' practices were rated second to that of Japanese firms. German firms ranked second and third on seven and three marketing practices respectively. Firms of Italy occupied second positions on two practices, ranked third on seven practices and the fourth position on one practice, retail availability. Firms of the U.K. shared the second position with German firms on one attribute, shared third positions with Italian and France firms on six practices, shared third positions with German and France firms on two practices, and shared the fifth position with France firms on one practice, retail availability. Finally, firms of France shared third positions with firms of Italy and U.K. on six practices, shared third positions with firms of the U.K. on two practices, shared the third position with Italian firms on one practice, and shared the fifth position with France firms on one practice, retail availability.

The results of this study point to several implications for international marketers. The study highlights the relative competitive position of the products from Japan, U.S., Germany, Italy, U.K., and France with respect to the eighteen marketing elements. Also, the study provides some insights as to several general ways by which the products of Japan, U.S., Germany, Italy, U.K., and France can be improved in order to better suit the needs and wants of Saudi consumers. Further, the study points out several ways that the marketing practices associated with products from Japan, U.S., Germany, Italy, U.K. and France can be refined in order to improve the competitive impact of these products in the Saudi market. Finally, the study focuses on several ideas about how the products and marketing practices of Japan, U.S., Germany, Italy, U.K., and France can be improved for other country markets in addition to the Saudi market.

Conclusion

The purpose of this paper has been to examine Saudi consumers' attitudes toward products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France. The approach in this study has been to utilize a number of general product attributes and marketing practices that can help explain the general attitudes of Saudi consumers toward foreign products and corresponding marketing practices.

Results indicate that, in general, there is a significant difference in the attitudes of Saudi consumers toward products and associated marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France. Saudi consumers correspondingly seemed to have the most positive attitudinal response to the products and associated marketing practices of Japan followed by the U.S.A. Among the four Western European competitors, Germany products and associated marketing practices were perceived more favorably by Saudi consumers. In general, Saudi consumers did not make any substantial distinctions among the products and associated marketing practices of Italy, U.K. and France. Further, the data highlight several general product attributes and marketing practices that can be improved by business firms in order to secure a more competitively attractive position in the Saudi Arabian consumer market.

This research sheds some light on the nature of consumers' attitudes toward products and associated marketing practices of major industrialized countries in a developing country market, Saudi Arabia. Hence, the study contributes to the growing body of literature related to cross-cultural comparisons of "country-of-origin" influence. Further, by utilizing a developing country as a setting for the research, the present study contributes to the generalizability of the existing body of research which is done mostly in industrialized countries. Finally, the study can be of value to the international marketers in a number of ways, including: the study highlights the relative competitive position of products and marketing practices of the U.S.A., Japan, Germany, Italy, U.K. and France in the Saudi Arabian market; it provides some insights as to the ways in which Saudi consumers react toward the products and marketing practices of the six

countries; and it points out several general ways by which the products and marketing practices of the six countries can be improved in order to better suit the needs of Saudi consumers.

This study is limited by several factors that should be addressed in future research. First, the results of this study should be tested further with other independent samples because a given data set can always have peculiar characteristics. Second, it is obvious that all of the various product attributes and marketing practices cannot be utilized in a single study. Therefore, a certain number of product attributes and marketing practices had to be selected for this study. Third, given the exploratory nature of this study, further research is necessary before detailed recommendations can be made to specific firms facing the competitive challenge in Saudi Arabia. Fourth, the study is cross-sectional in nature, hence, the analyses fail to capture the dynamic nature of consumer attitudes related factors. Finally, various other determinants of country-of-origin influence, including product type, product familiarity, etc., need to be explored.

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المنافسة السوقية بين دول صناعية كبرى في المملكة : تأثير بلد المنشأ على تقييم المنتج الأجنبي

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ملخص البحث. يدرس الباحث ميول الزبائن نحو المنتجات والممارسات التسويقية لكل من المنتجات الأمريكية، اليابانية، الألمانية، الإيطالية، والبريطانية، والفرنسية في الأسواق السعودية. تستخدم هذه الدراسة ١٨ صفة للمنتج ومؤشراً للممارسات التسويقية لشرح الميول العامة للسعوديين نحو المنتجات والممارسات التسويقية لست أقطار صناعية كبرى. وبعد اختيار ٣٠٠ زبون سعودي، يتضح أن لديهم ميولاً إيجابية نحو المنتجات والممارسات التسويقية لكل من اليابان والولايات المتحدة الأمريكية. وأما المنتجات والممارسات التسويقية الألمانية فقد كانت الأفضل من بين الدول الأوربية الأربع. هذا ولم يكن لدى الزبائن السعوديين فرق جوهري بين المنتجات والممارسات التسويقية لكل من المنتجات الإيطالية، البريطانية، والفرنسية.