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Competition *between* and competition *within*: the strategic positioning of competing countries in key export markets

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Abstract

Purpose: *This research aims to understand how five Producing Countries (PCs) – Australia, Chile, France, South Africa and the US – are perceived by consumers in five Consuming Countries (CCs) – UK, Ireland, US, Canada, and Sweden – in relation to the following product dimensions: taste profile and distinctiveness, wine type, labelling, packaging, consumption occasion, safety, reliability and environmental friendliness.*

Design/methodology/approach: *An international consumer panel company provided about 500 respondents per CC, who took part in an on-line survey. A pick-any approach measured the associations of product attributes to each of the five PCs. Deviations from the expected value greater than 5% characterise differences in perception by consumers in a specific CC to the PCs.*

Findings and Practical implications: *The study shows the efficacy of the pick-any approach to simultaneously provide information on the position occupied by a PC in the minds of consumers located in different CCs and the role played by different PCs in a specific CC. These results will be particularly useful for both public and private wine bodies when designing export strategies.*

Key words: *cross-national, pick-any approach, competition, positioning, country image.*

1. INTRODUCTION

The last twenty years have seen a fast internationalisation of wine markets across the globe and the rise of the new wine world, competing with traditional wine producing countries (OIV, 2010). This research fills an important gap as new and old wine countries are involved in strong competition in most international wine markets with significant import share. While new wine world producers have initially been perceived as relatively homogeneous by wine consumers, large investments in national marketing campaigns and long term presence in the markets have likely resulted in differences *within* new world producing countries. On the other hand, the initial success of new world wine countries have forced old wine producers to adapt and to change their wine making and marketing. This competition has almost resulted in a reversal of the original positioning, where new wine world producers now strive for regionality and organic production, formerly a stronghold of traditional producers. Similarly, old wine countries now compete with brands and modern packaging to keep or regain market shares lost to new world competitors. It is therefore unclear, to what degree consumers' country images still differ *between* old and new wine producing countries.

Large and small wineries regularly export their products to generally more than one country (Crozet et al., 2009). It is, therefore, important to understand how consumers perceive wines coming from different *Producing Countries* (PC) in key *Consuming Countries* (CC), not only in relation to traditional intrinsic and extrinsic product attributes (Mueller et al., 2010a), their taste (Sirieix and Remaud, 2010), their value-for money (Orth, 2006), or matching with food (Casini et al., 2009), but they are also required to be safe, reliable, and environmentally friendly (Euromonitor International, 2010).

In addition, knowing the positioning of a country in consumers' minds is important, because when consumers are in front of a shelf or a menu, they are faced with multiple wine areas. If one knows only how *good* a country is, without having information on how much *better* or *worse* the country appears in relation to its main competitors, one risks putting in place inefficient exporting strategies. By using a free-choice *pick-any* approach (Driesener and Romaniuk, 2006), this research aims to understand how five PCs – Australia, Chile, France, South Africa and the US – are perceived in five CCs – UK, Ireland, US, Canada, and Sweden – in relation to a series of intrinsic and extrinsic product attributes, whose baseline level of importance has been provided by existing literature (Goodman, 2009; Loveless et al., 2010).

2. LITERATURE REVIEW

Wine is never chosen for one exclusive reason. Some elements are certainly more important than others, but the final consumer choice is generally determined by a mix of factors. Researchers often focus their attention on the dichotomy between intrinsic and extrinsic attributes (Egan et al, 2008; Mueller et al., 2010a), but new elements such as the consumption occasion (Halsted, 2002; Martinez-Carrasco Martinez et al., 2006), environmental friendliness (Mueller and Remaud, 2010; Sirieix and Remaud, 2010), safety and reliability (Loveless et al., 2010) have been progressively taken into account.

2.1. Taste and packaging attributes

There is a long history of research debating the relative importance of intrinsic attributes, relating to the taste of wine, and extrinsic attributes, such as labelling information and packaging. While both attribute types are important to consumers when evaluating wine, the majority of studies conclude that extrinsic product information is dominant (Lange et al., 2002; Combris et al., 2009; Siegrist and Cousins, 2009; Mueller, et al. 2010a; Mueller and Szolnoki, 2010). Consumers' perceptions of a wine producing country are suggested to differ regarding taste, labelling and packaging attributes.

2.2. Value for money

Price has an ambivalent role for consumers' wine quality perception and purchase intent. Consumers usually associate wines of higher price with higher quality (Plassman et al., 2008; Mueller et al., 2010a), when evaluating liking. But when it comes to purchase intent, most consumers prefer lower and medium over higher prices (Mueller et al., 2010a). Accordingly, value for money perceptions are suggested to be an integral part of wine producing country perceptions.

2.3. Wine consumption occasion

The importance of intrinsic and extrinsic elements varies in relation to the occasion in which the wine is consumed (Hall et al., 2001). For example, Martinez-Carrasco Martinez et al. (2006) report differences in the utility between formal wine occasions in restaurants relative to informal consumption. More recently, the results of an international research project about consumers' preferences toward wine in retail (Goodman, 2009) and on-premise (Goodman et al., 2008) resulted in strong differences in the importance of choice drivers between both occasions. Recommendations and grape variety were two key elements for the choice of wine in a retail environment, while matching with food and the desire to try something different are most important in an on-premise setting. Wines from different countries of origin are likely to differ in consumers' perceived suitability to fulfil these different needs of informal and formal occasions.

2.4. Environmental friendliness

Environmental issues are increasingly in consumer attention and are becoming a key issue in the competition between old and new wine countries. Mueller and Remaud (2010) found that only a small share of Australian consumers are willing to pay a price premium for eco-friendly claims, but organic wines strongly improved in terms of consumers' evaluation between 2007 and 2009. Delmas and Grant (2008) investigated the price premium American consumers are willing to pay for eco-certification and Sirieix and Remaud (2010) measured perceptions Australian consumers have with environmental friendly wine. At this stage it is unknown, how consumers in different CCs differ in their perception of environmental friendliness across several PCs.

2.5. Food safety and reliability

Wine safety and reliability are the result of a combination of extrinsic elements, such as medals, prices, brands, and region of origin (Lockshin, et al. 2006). These elements have been widely investigated in the wine marketing literature for consumer choices analyses, but they

have been never put in relation to safety and reliability; this differs to what we have seen in other food categories such as poultry (Stefani et al., 2008), beef (Loureiro and Umberger, 2007), or other fresh products (Pouliot and Sumner, 2008). Only Rocchi and Stefani (2006) observed that traditional origins are sometimes interpreted as a sign of reliability, but also can be a sign of lack of tradition.

2.6. Cross-country image research

The concept of Country Image (CI) refers to the descriptive, inferential and informational beliefs one has about a particular country (Martin and Eroglu, 1993). It conceptually derives from the literature on Country of Origin (COO) effects (Balestini and Gamble, 2006, Wang and McCluskey, 2010; Veale and Quester, 2010), as COO cues can be salient and relevant for high involvement products such as wine (Zeugner-Roth and Diamantopoulos, 2010). CI is important in the wine sector as it is able to influence product evaluation of wine purchasing (Arias-Bolzmann et al., 2003, Batt and Dean, 2010) and affects price expectations (Papadopoulos and Heslop, 2002).

However, contrasting to other product categories, where CI effects have been comparatively investigated at a cross country level (Elliot et al., 2010; Yeh et al., 2010), all the studies in the wine marketing literature focused on single-countries (Lee and Lockshin, 2010, Wang and McCluskey, 2010). Only more general studies on preferences towards intrinsic and extrinsic wine attributes and choice drivers have been conducted in multiple countries (Goodman, 2009; Jarvis and Stasi, 2010; Remaud et al., 2010;) showing significant differences between New World (NW) and Old World (OW) countries.

To our best knowledge, we are not aware of a study comparing country of origin perceptions of old and new wine producing countries across a number of key export markets. This research fills an important gap as new and old wine countries are involved in strong competition in most international wine markets with significant import share.

3. SAMPLE AND METHOD

The authors selected five old and new world PCs from four continents, which strongly compete in most import wine markets – Australia, Chile, South Africa and the US as new wine world countries and France as the most typical representative of the old wine world. Respondents were selected in five CCs – UK, Ireland, US, Canada, and Sweden – which represent key export markets for each of the PCs selected above. These CCs show different cultural and wine purchasing backgrounds, which are likely to provide different results in the perceptions of the various PCs. An international consumer panel company provided about 500 respondents per CC, who took part in an on-line survey. The respondents had to be frequent wine consumers, that is they drank wine at least once per month.

A list of attributes for each of the seven main intrinsic and extrinsic product dimensions – taste profile and distinctiveness, wine type, labelling, packaging, consumption occasion, safety and reliability and environmental friendliness – was developed based on an extensive review of existing wine marketing literature as discussed in the literature review. Due to space limitations, it is not possible to present the complete list of country image items, a sub-sample is provided in the first column of Appendix A.

A *pick-any* approach (Driesener and Romaniuk, 2006) measures the associations with each of the five PCs. This recent methodology has been widely applied in the branding field (Romaniuk et al., 2007; Bogomolova and Romaniuk, 2010; Nenycz-Thiel and Romaniuk,

2009), but it has been always used to measure associations to identity brand elements, such as descriptors, colours and slogans, not countries of origin. The method consists of showing respondents a list of product (brand) attributes for each of the dimensions researchers want to investigate. For each dimension respondents are asked to indicate which, if any, country (brand) they would associate with each attribute. Respondents could select as many attributes as they wanted and could also link the same attribute to more than one PC. Like other forced-choice methods, the *pick-any* approach allows obtaining similar information as forced-choice approaches, but it is quicker to understand and complete (Bogomolova and Romaniuk, 2010)

In order to measure the propensity of the respondents belonging to *k-th* CC to associate the *i-th* element of *z-th* product dimension to the *j-th* PC, the deviation from the expected value a *i-th* element of the *z-th* product dimension would receive from the respondents belonging to the *k-th* CC with regards to the *j-th* PC was calculated according to the following formula:

$$\%Dev_{izjk} = \left[\frac{\text{Count}_{izjk} - \left(\sum_{i=1}^m \text{Count}_{izjk} * \sum_{j=1}^m \text{Count}_{izjk} \right)}{\sum_{i=1}^m \sum_{j=1}^m \text{Count}_{izjk}} \right] * 100$$

where:

Count_{izjk} = number of times the *i-th* element of the *z-th* product dimension has been associated to the *j-th* PC by the respondents belonging to the *k-th* CC;

n_k = number of respondents for the *k-th* CC.

Analogous to the concept of statistical significance, all the *i-th* deviations greater than 5% from the expected value are considered important and therefore characterise unique perceptions of a specific consuming country towards a specific producing country.

4.RESULTS

A summary of the findings will be provided for each PC for all six country image dimensions. Due to space limitations detailed tables with CC specific results cannot be shown here. The Appendix gives an example of a CC specific results table.

4.1.Taste profile and distinctiveness

The results for taste profile and distinctiveness (see Table 1) show that Australian wines were perceived as good, not boring and easy to drink in every CC. This result is particularly interesting, as none of the other PCs obtained a similar judgement. Chilean wines were positively judged in terms of taste and ease of drinking only in Ireland and Sweden. These CCs appreciated the varieties produced in Chile and thought that these wines were exciting. At the same time, Irish, English and Swedish consumers believed Chile is not a very distinctive wine region. In addition, Chilean wine styles and varieties were perceived as very homogeneous in Ireland and Canada. This judgement was shared with South African wines, especially in the United Kingdom, US, Ireland and Sweden. However, in the UK and the US, South African products were thought of as having neither appeal nor tradition; they were considered exciting, not boring, and fashionable, in Ireland and Sweden. In this context it is worth noting the positioning of US wines. They were thought to be boring, not easy to drink or tasty among the five CCs. Moreover, they were perceived as not coming from a very unique region and were perceived to be very similar to each other.

France, as the old world producer, was different from all other PCs. The first element to observe was that French wines had a very unique and distinctive profile, with the highest degree of deviation from the average. History and tradition were their key strengths. They were perceived as complex, elegant and thought-provoking wines. Moreover, in the consumers' perception they offered a wider range of styles and varieties, which also make them more exciting. On the other side, French wines were not particularly appreciated for their taste and certainly are not easy to drink.

Tab. 1: Taste profile and distinctiveness

Producing countries	summary of perceptions in the five CCs
Australia	Good, not boring, easy to drink
Chile	Good and easy to drink in Ireland and Sweden, but not distinctive and homogeneous
France	History and tradition, complex, elegant, exciting and provoking wines
South Africa	Very homogeneous wine styles and varieties, no appeal or tradition
USA	Boring, not easy to drink, very similar between each other and not coming from a very distinctive region

4.2. Wine Types

This dimension measured which wine type consumers associate with each PC (see Table 2), it was noted that English, Irish and Swedish consumers considered Australia as the home of white wines, while US and Canada associated this country with the production of red wines. It is interesting to observe that Chile is generally recognised as a red wine PC, and that one cannot think about sparkling wines without mentioning France. Conversely, South Africa showed a tendency towards both red and white wines, while all CCs, apart from Sweden, thought of the US when being asked about rosé wine.

Tab. 2: Wine types

Producing countries	summary of perceptions in the five CCs
Australia	White wines for the UK, Ireland and Sweden, Red wines for USA and Canada
Chile	Red wines
France	Sparkling wines
South Africa	Red and white wines
USA	Rosé wines for all but Sweden

4.3. Labelling, packaging and price

Australia and USA were considered very similar in relation to labelling, packaging and price. Wines coming from these two countries were perceived as not expensive and as easy to understand. The labels were associated with being modern and, with regard to Australian wines, also unique, especially for Canadian and US consumers. The ability to produce good-value-for-money wines was also recognised for Chile, but this country was still not able to communicate this to its final users. Chilean wine labels lacked modernity and were difficult to understand; a situation. This last point is also common to French wines. Every CC thought that French wines were very difficult to understand and were also very classic. At the same time, they were also considered expensive, so consumers did not often think of buying them in the future (see Table 3).

Tab. 3: Labelling, packaging and price

Producing countries	summary of perceptions in the five CCs
Australia	Not expensive and easy to understand, modern and unique labels, especially for Canada and the US
Chile	Good-value-for-money, but they lack modernity and are difficult to understand
France	Classic, expensive, and difficult to understand labels
South Africa	Good-value-for-money and modern packaging only for Sweden
USA	Not expensive and easy to understand, modern labels

4.4. Consumption Occasions

In terms of consumption occasions, France again generated the most distinctive profile among our CCs. While South African wines did not seem to play a role for daily consumption or as wines for special occasions, and Chilean, Australian and US wines were considered good for a dinner at home with friends or for a relaxed night out, French wines were synonymous with celebration. To honour a special occasion, having a dinner in a fine dining restaurant, or to give a gift, French wines were preferred in every CC. It is also interesting to note that the consumption of French wine was strongly associated with food. While consumers did not have any particular problem in opening a bottle of wine coming from other PCs without having a meal, French wines are thought to be ideal with food (see Table 4).

Tab. 4: Consumption Occasions

Producing countries	summary of perceptions in the five CCs
Australia	Dinner at home with friends or a relaxed night out
Chile	Dinner at home with friends or a relaxed night out
France	Special occasions, dinner in a fine dining restaurant, gifts to be matched with food
South Africa	Indifferent
USA	Dinner at home with friends or a relaxed night out

4.5. Wine safety and reliability

In terms of perceptions of wine safety and reliability (see Table 5), the US and Canada appeared to be the two CCs where PCs had the most distinctive profiles in consumer perception. The % deviations for these two CCs, were much higher than for Ireland, Sweden or the UK. Common elements between Canada and the US were the lack of trust towards Chile and South Africa. It was believed that wines coming from these two regions are not safe and lack quality control, with the consequence that consumers do not really know what they are going to consume. Moreover, production was not considered reliable, and quality variability is one of the elements which characterised them the most.

Conversely, France, despite the negative judgments on label clarity, was considered safer and able to supply reliable products. Quality controls were perceived as being above minimum levels and, in general, French production inspired trust. This safety, however, did not seem to stem from labelling information, but from the credibility of French wine regions and vineyards, as well as from the possibility of knowing who is behind the production of a certain wine. It is interesting to note that, while US consumers had confidence in domestic production, judging it as safe, trustworthy, reliable, and able to guarantee good quality controls, consumers in other CCs critically perceived trustworthiness, reliability and quality

standards of US wines. Finally, Australian wines were positively considered by all CCs, especially for the ability to produce safe wines. In addition, Canadian, English, and Irish consumers thought it possible to know who made the wines and appreciate the reliability of Australian wines. The perception of safety seemed to come more from what it is on label than the region or vineyards a wine comes from.

Tab. 5: Wine safety and reliability

Producing countries	summary of perceptions in the five CCs
Australia	Safe wines. Canada, Ireland and UK appreciate Australian reliability, but based on what is on labels rather than wine areas and vineyards
Chile	Not safe, lacking quality control, not reliable and variable quality for US and Canada
France	Safe and able to supply reliable products. Credibility of French wine areas and vineyards
South Africa	Not safe, lacking quality control, not reliable and very variable quality for US and Canada
USA	Trustworthy, reliable and good quality controls only for domestic consumers

4.6. Environmental friendliness

Finally, we present the results of the perception of environmental friendliness of the five PCs (see Table 6). South African wines were quite negatively judged by US consumers. Canadian and US consumers thought that South African wine was not environmentally friendly or sustainable. They felt the production of wine generates serious environmental damage, which is reflected in the carbon and water footprint left by these wines. A similar opinion, although less negative, was given by US consumers of Chilean wines, which were perceived as not environmentally friendly products from polluted areas. Conversely, French wines obtained a high score from all CCs. French production was considered as very natural and respectful of the environment. French wines were perceived to be sustainably produced, requiring little energy or water. As such, the environment in France was considered very clean. Although it may appear obvious that English, Irish and Swedish consumers think that these products do not generate many food miles given their proximity to France, it is interesting to observe that this opinion was also common among Canadian and US consumers. These last two CCs believed that Chilean and South African wines have higher food mileage. As for safety and reliability aspects, it is again interesting to observe the nationalistic position of US consumers with regard to their domestic production. Contrary to other CCs, who did not believe in the natural, sustainable and environmentally friendly US wine production, American consumers believed that domestic production does not have much impact in terms of energy and water and does not use unnatural substances. This might not be surprising as the US was the only country, which was selected both as PC and CC in this study. Similar deviating self perceptions are likely for other wine producing countries.

Finally, Australian wines were considered respectful of the environment among all CCs, but they were slightly perceived as having high food miles in Ireland and Sweden. In particular, the Canadian market was very much in favour of Australian production. These wines were put at the same level as French wines, especially in relation to the cleanliness of the environment and the carbon and water footprint.

Tab. 6: Environmental friendliness

Producing countries	summary of perceptions in the five CCs
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Australia	Environmentally friendly, especially in Canada. Canadian consumers put Australia on the same level of France. High food mileage in Ireland and Sweden
Chile	Not environmentally friendly, coming from polluted areas, with a high food mileage for US and Canada
France	Natural, sustainable and respectful of the environment. Low food mileage
South Africa	Not environmentally friendly, coming from polluted areas, with a large carbon and water footprint and high food mileage for US and Canada
USA	Natural, sustainable and environmentally friendly only for US consumers

5. CONCLUSION

The study measured consumer perceptions with five different new and old world wine producing countries across five consuming countries. Results revealed that new wine producing countries were not seen as homogeneous but were perceived distinctively differently from each other in most CCs. During their market presence of more than ten to fifteen years in most export markets, new world wine producing countries have build up unique country images. At the same time our research confirmed a still existing strong divide in the profile between new world and the most prominent old world country, France, which had the most distinctive profile in all CCs.

From a methodological perspective this study confirmed the efficacy of the *pick-any* approach to simultaneously provide information on the position occupied by a PC in the minds of consumers located in different CCs and on the role played by different PCs in a specific CC. In a quicker and easier to understand approach than forced-choice methods, the *pick-any* approach provides a wide range of information to marketers.

From a managerial point of view, this data is particularly useful for both public and private wine bodies, when export strategies need to be designed or realigned. If we discuss the results in relation to Australia, for example, we can see that this PC has a relative competitive advantage in relation to Chile, South Africa or the US in most importing countries. Australian wine may well compete with the other new world PCs, when consumers need to chose a wine for a dinner with friends or for a casual night out, focusing in particular on the clarity of its labels and the reliability of its production. Moreover, in case Australian producers want to export to Canada or the US, they should stress the environmental character of Australian wine production. At this stage Australia is still not able to compete with French wines in the on-premise sector.

Further research could look at extending this study to other PCs and CCs, in order to identify the positioning of other competing PCs in the minds of consumers located in other strategic key markets. Moreover, segmentation analyses (Mueller and Rungie, 2009) should be performed on this data, aiming at understanding whether consumers differentiate more between different PCs or between the product attributes they are exposed to.

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Appendix

Tab. 7: Elements utilised for taste profile and distinctiveness dimension (CCs in rows, PCs in columns; red indicates deviations larger than 5%)

UK n = 525		Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	taste good	10	1	-15	5	-2
1	are easy to drink	11	0	-18	5	2
2	are complex and thought provoking	-6	4	9	-1	-6
3	have a lot of different styles and a variety of tastes	2	-3	7	-1	-6
4	taste pretty much the same and are boring	-9	0	-4	-5	17
5	are truly different from wines from other countries	-2	7	-3	3	-5
6	are produced in distinct wine regions	-7	-9	23	-6	-2
Ireland n = 533		Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	taste good	12	7	-17	4	-7
1	are easy to drink	13	7	-24	3	1
2	are complex and thought provoking	-8	0	15	-1	-7
3	have a lot of different styles and a variety of tastes	-2	-2	10	0	-6
4	taste pretty much the same and are boring	-5	-7	-10	-2	24
5	are truly different from wines from other countries	-3	5	3	2	-6
6	are produced in distinct wine regions	-7	-10	23	-5	0
US n = 516		Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	taste good	8	1	-7	0	-2
1	are easy to drink	5	-1	-11	-1	8
2	are complex and thought provoking	-3	0	10	-1	-7
3	have a lot of different styles and a variety of tastes	-2	-4	1	-3	8
4	taste pretty much the same and are boring	1	4	-5	6	-6
5	are truly different from wines from other countries	-1	1	3	4	-7
6	are produced in distinct wine regions	-8	-2	9	-5	6
Canada n = 519		Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	taste good	10	2	-9	2	-5
1	are easy to drink	7	2	-12	0	3
2	are complex and thought provoking	-3	1	11	0	-9
3	have a lot of different styles and a variety of tastes	3	-7	6	-2	0
4	taste pretty much the same and are boring	-9	-1	-12	1	20
5	are truly different from wines from other countries	1	6	0	4	-11
6	are produced in distinct wine regions	-8	-4	16	-4	1
Sweden n = 505		Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	taste good	10	5	-10	4	-8
1	are easy to drink	10	5	-18	2	1
2	are complex and thought provoking	-5	0	9	1	-6
3	have a lot of different styles and a variety of tastes	1	0	4	1	-7
4	taste pretty much the same and are boring	-7	-4	-5	-7	23
5	are truly different from wines from other countries	-2	2	-4	6	-1
6	are produced in distinct wine regions	-7	-7	24	-6	-3

Tab. 8: Elements utilised for environmental friendliness (CCs in rows, PCs in columns; red indicates deviations larger than 5%)

UK	n = 525	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are produced in an environmentally friendly manner	9	-10	9	-4	-5
1	harm the environment during their production	-6	7	-3	1	1
2	are natural products	0	-2	11	0	-9
3	contain unnatural additives	-6	4	-3	1	4
4	have a large carbon footprint (high greenhouse gas emission)	-3	3	-6	-1	8
5	have a large water footprint (high water use, low water conservation)	-2	1	-3	2	2
6	have high food miles	3	9	-21	5	4
7	come from a clean environment	4	-6	7	-2	-3
8	are produced sustainably	1	-5	9	-1	-3
IRE	n = 533	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are produced in an environmentally friendly manner	9	-7	10	-6	-6
1	harm the environment during their production	-5	5	-4	1	3
2	are natural products	-3	0	16	-3	-10
3	contain unnatural additives	-6	1	-4	2	7
4	have a large carbon footprint (high greenhouse gas emission)	-2	1	-9	1	10
5	have a large water footprint (high water use, low water conservation)	-2	0	-5	4	3
6	have high food miles	5	6	-23	6	6
7	come from a clean environment	3	-2	9	-4	-6
8	are produced sustainably	1	-4	10	-2	-5
US	n = 516	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are produced in an environmentally friendly manner	5	-10	4	-13	14
1	harm the environment during their production	-3	8	-7	9	-7
2	are natural products	3	-3	7	-7	0
3	contain unnatural additives	-3	6	-5	9	-7
4	have a large carbon footprint (high greenhouse gas emission)	-3	2	-2	8	-5
5	have a large water footprint (high water use, low water conservation)	-1	4	-3	6	-6
6	have high food miles	2	5	-2	6	-11
7	come from a clean environment	1	-6	4	-10	11
8	are produced sustainably	0	-6	5	-9	10
CAN	n = 519	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are produced in an environmentally friendly manner	12	-9	7	-8	-2
1	harm the environment during their production	-8	8	-7	7	-1
2	are natural products	2	-1	10	-4	-7
3	contain unnatural additives	-6	4	-8	4	6
4	have a large carbon footprint (high greenhouse gas emission)	-6	3	-7	3	7
5	have a large water footprint (high water use, low water conservation)	-5	2	-6	6	3
6	have high food miles	-1	3	-2	6	-6
7	come from a clean environment	8	-6	5	-7	0
8	are produced sustainably	3	-5	6	-5	0
SWE	n = 505	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are produced in an environmentally friendly manner	10	-3	4	-3	-8
1	harm the environment during their production	-4	3	-2	0	3
2	are natural products	-3	1	12	0	-10
3	contain unnatural additives	-3	-1	0	-1	6
4	have a large carbon footprint (high greenhouse gas emission)	-4	-1	-2	-1	8
5	have a large water footprint (high water use, low water conservation)	-5	1	-1	3	1
6	have high food miles	7	6	-28	8	8
7	come from a clean environment	3	-3	7	-3	-4
8	are produced sustainably	0	-3	10	-3	-5

Tab. 9: Elements utilised for safety and reliability (CCs in rows, PCs in columns; red indicates deviations larger than 5%)

UK	n = 525	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are safe	4	-3	-5	0	4
1	are reliable	6	-2	-1	0	-3
2	are risky because you don't know what you will get	-13	13	-6	0	6
3	have consistent quality	8	-5	2	1	-6
4	are variable in quality	-13	8	-1	1	5
5	are trustworthy	8	-7	3	-1	-4
6	inspire confidence	3	-5	10	-2	-6
7	have a minimum quality standard	-3	1	0	0	3
IRE	n = 533	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are safe	8	-4	-4	-1	2
1	are reliable	3	1	2	0	-5
2	are risky because you don't know what you will get	-10	2	-9	4	13
3	have consistent quality	4	1	3	2	-10
4	are variable in quality	-7	5	-11	3	11
5	are trustworthy	5	-2	5	-2	-7
6	inspire confidence	3	-1	12	-4	-10
7	have a minimum quality standard	-5	-2	3	-2	6
US	n = 516	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are safe	10	-2	-2	-4	-2
1	are reliable	3	-7	7	-12	10
2	are risky because you don't know what you will get	-7	18	-16	30	-24
3	have consistent quality	1	-8	11	-12	8
4	are variable in quality	-2	9	-11	12	-9
5	are trustworthy	0	-7	7	-11	11
6	inspire confidence	-4	-10	11	-11	15
7	have a minimum quality standard	0	8	-7	7	-8
CAN	n = 519	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are safe	7	-5	-1	-5	4
1	are reliable	5	-4	5	-7	1
2	are risky because you don't know what you will get	-16	17	-16	19	-4
3	have consistent quality	9	-9	10	-7	-3
4	are variable in quality	-11	13	-16	9	6
5	are trustworthy	8	-10	11	-7	-2
6	inspire confidence	6	-7	13	-7	-5
7	have a minimum quality standard	-7	5	-7	5	4
SWE	n = 505	Producing Countries - % Dev				
		Aus	Chile	France	SA	US
0	are safe	8	-2	1	-2	-5
1	are reliable	3	0	2	0	-5
2	are risky because you don't know what you will get	-5	2	-6	-3	12
3	have consistent quality	-1	0	7	2	-9
4	are variable in quality	-5	3	-11	1	12
5	are trustworthy	3	-1	4	2	-8
6	inspire confidence	1	1	2	2	-7
7	have a minimum quality standard	-4	-3	0	-2	10